

British Horse Industry Confederation

Strategy for the Horse Industry in England and Wales



Llywodraeth Cynulliad Cymru
Welsh Assembly Government



Department for Environment
Food and Rural Affairs

Front Cover of the Strategy for the Horse Industry in England – Photograph descriptions

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| <p>1. Thoroughbred mare and foal grazing – Thoroughbreds have been bred here for over 300 years and 5,000 thoroughbred foals are produced yearly. There is also an important section of the breeding industry devoted to producing Sport Horses.</p> | <p>2. Horse being lunged in an outdoor arena – The estimated value of riding lessons is £500 million annually.</p> | <p>3. Exmoor ponies – An endangered native species, used here to aid conservation in water meadows.</p> |
| <p>4. Horse racing – Over five million people visit the 59 racecourses in Great Britain each year.</p> | <p>5. Riders enjoying open countryside – 2.4 million people ride, and many more have an interest in horses, reflecting the industry's growth potential.</p> | <p>6. Great Britain's Olympic Eventing team won Silver in Athens in 2004 – the Olympics and the Paralympics form the peak of equestrian sport.</p> |
| <p>7. Equestrian businesses – The horse industry's gross output is estimated at £3.4 billion and includes equestrian businesses such as tack/feed shops, livery yards and riding schools, amongst others.</p> | <p>8. A group of disabled young riders practise a drive to music – Horses can provide valuable therapy and learning opportunities for young people and adults alike.</p> | <p>9. Shoeing a horse – Farriers are one of the many professional services forming part of the horse industry. Other services include specialist vets, saddlers and many more.</p> |

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Strategy for the Horse Industry in England and Wales

Prepared by the British Horse Industry Confederation

in partnership with

the Department for Environment, Food and Rural Affairs

the Department for Culture, Media and Sport

the Welsh Assembly Government

December 2005



THE BRITISH HORSERACING BOARD



The British Horse Society
Registered Charity No. 210504



THE THOROUGHBRED
BREEDERS' ASSOCIATION



BRITISH
EQUESTRIAN
FEDERATION



British Horse Industry Confederation



Llywodraeth Cynulliad Cymru
Welsh Assembly Government



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Food and Rural Affairs

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Contents

| | <u>Page</u> |
|--|-------------|
| Ministerial foreword | 6 |
| Industry foreword | 8 |
| Executive summary | 10 |
| Introduction | 18 |
| <ul style="list-style-type: none">• The purpose of this Strategy• Vision for the Horse Industry• The nature of the Horse Industry• The extent of the industry• Equine Health and Welfare• The importance of the industry• The future of the industry• The preparation of this Strategy• Strategic aims | |
| Strategic aims and objectives | |
| 1. Bring the Horse Industry together and develop its national, regional and local impact | 26 |
| <ul style="list-style-type: none">a) Bring the industry together nationallyb) Develop the industry's regional and local influence | |
| 2. Increase participation in equestrianism and the social contribution of the Horse Industry | 32 |
| <ul style="list-style-type: none">a) Increase participation in equestrianismb) Work with Government to develop the social, educational and health benefits of association with horses | |
| 3. Boost the economic performance of equestrian businesses | 42 |
| <ul style="list-style-type: none">a) Raise standards of business performanceb) Encourage co-operation to improve business opportunitiesc) Ensure strong links with Development Agenciesd) Ensure a level fiscal and regulatory playing fielde) Reach an industry view on the status of the horse | |

- f) Address problems associated with insurance & health and safety risk management
 - g) Enhance the value of equestrian goods and services
 - h) Increase equestrian tourism
4. Raise equestrian skills, training and standards 58
- a) Attract and retain staff
 - b) Provide an environment in which people wish to build a career
 - c) Identify skill levels and training needs
 - d) Improve opportunities for work- and college-based learning
5. Increase access to off-road riding and carriage driving 63
- a) Ensure a joined up and well-maintained network of public rights of way
 - b) Increase provision of other off-road equestrian routes and of areas with equestrian open access
 - c) Continue safety education for motorists, riders and carriage drivers
 - d) Ensure urban and suburban riding and carriage driving is promoted and improved
6. Consider the environmental impact of the horse 77
- a) Improve standards of land management
 - b) Encourage correct and safe manure storage and disposal
 - c) Encourage the use of horses in conservation grazing projects which support wildlife and pasture biodiversity
7. Encourage sporting excellence 85
- a) Extend coaching development programme
 - b) Improve the standard of facilities
 - c) Extend long-term athlete and equine development programmes
 - d) Encourage unaffiliated bodies to engage
8. Improve the quality and breeding of horses and ponies 89
- a) Establish lead bodies to assist in the improvement of the quality of horses and ponies
 - b) Capitalise on National Equine Database to improve breeding
 - c) Raise standards in studs
 - d) Balance genetic improvement with genetic diversity
 - e) Conservation of native and indigenous horses and ponies

Resources, Monitoring and Implementation 99

Annex A :
Government departments' Public Service Agreement 100
aims and objectives

Ministerial Foreword

Government recognise the major contribution which the horse industry makes to the economy, and the important role that horses play in the lives of so many people in both the cities and rural areas across England and Wales. Moreover, Government shares with the British Horse Industry Confederation a strong conviction that the industry has the potential to develop further and to contribute even more. This Strategy is aimed at unlocking that potential.

Over the past four years, the relationship between the industry and Government has developed markedly, and a real working partnership has emerged. The publication of this Strategy is a landmark in this partnership, and recognition of the value and potential of all horse-related activities.

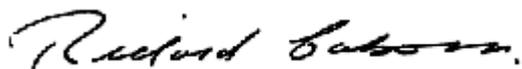
We were delighted with the constructive responses to the consultation on the draft Strategy, and the document has evolved significantly as a result. The Strategy provides an exciting and demanding challenge, and we recognise the groundwork done by the British Horse Industry Confederation and others in recent years to enable the industry to meet that challenge. The Strategy now includes more information about how the industry can contribute towards achieving national priorities, such as economic growth, community development, education, sport, health, rural regeneration, environmental protection and social inclusion and how Government can help them improve their performance. The Strategy is not, however, set in stone, and Government will continue to look for further ways in which it can work with the industry to achieve common objectives, for example in relation to improving access for riders to safe, off-road routes and widening participation. We also want to encourage the industry to look ahead to make the most of opportunities available to them, such as the London Olympics in 2012.

This Strategy does not stand alone. It sits beside the Health and Welfare Strategy for the Horse, Pony and Donkey which is also being developed in cooperation with the horse industry, and supports existing work such as the horse passport scheme and the establishment of the National Equine Database, into which Government has already invested large sums of public money.

The horse industry encompasses a remarkably broad range of activities and businesses, all of which rest in one way or another on the horse and draw on the passionate enthusiasm it arouses. The implementation of the Strategy will require the harnessing of this enthusiasm, and the continued, positive efforts of everyone interested in horses or engaged in horse-related business. For this Strategy to succeed, it is vital that the good work that has gone into developing this Strategy continues and does not lose momentum. We, therefore, urge everybody concerned with horses and equestrianism to read this Strategy and pledge their support, so that we can move forward in unison to deliver the vision it sets out of a strong, vibrant and sustainable future.

A handwritten signature in black ink, appearing to read 'Jim Knight'. The signature is fluid and cursive, with a large initial 'J' and a long horizontal stroke at the end.

Jim Knight MP
Minister for Rural Affairs and Local Environmental Quality and
Minister for the Horse Industry

A handwritten signature in black ink, appearing to read 'Richard Caborn'. The signature is cursive and somewhat stylized.

Richard Caborn MP
Minister for Sport and Tourism

A handwritten signature in black ink, appearing to read 'Carwyn Jones'. The signature is cursive and elegant.

Carwyn Jones AM
Minister for Environment, Planning and Countryside
Welsh Assembly Government

Industry Foreword

Given the large number of people who ride horses or drive carriages, the larger number who work in horse-related businesses and the still larger number who have an interest in horses which stops short of active participation, some might imagine that the horse industry constitutes one of the most influential pressure groups in England and Wales today.

They might also imagine that this multi-billion pound industry would be well able to co-ordinate its efforts, improve its economic efficiency and easily persuade new people into the sport.

Unfortunately they would be wrong in both their imaginings. As a community we have too long been punching beneath our weight and have lacked either the will or the wit to capitalise on the strength which comes from effective and wholehearted co-operation.

But this Strategy has the capacity to mark a very important turning point in the fortunes of the horse industry in England and Wales. It represents the fruits of two years of enthusiastic co-operation between all the signatory equestrian organisations, and between the industry and Government. It has also been given increased authority by the huge response to the consultation exercises which have punctuated its creation. The Strategy reflects in particular the labours of seven 'Champions' - Annie Dodd (British Horseracing Board), Claire Williams (British Equestrian Trade Association), Margaret Linington-Payne (British Horse Society), Cathy McGlynn (British Horse Industry Confederation consultant), Pat Harris (British Horse Industry Confederation consultant), Andrew Finding (British Equestrian Federation), Graham Suggett (British Equestrian Federation) and David Mountford (British Equine Veterinary Association) and I am confident that the end product is a fair reflection of what the majority of participants within the industry would like to see happen over the coming months and years.

However, whereas we can rejoice that the Strategy has at last seen the light of day, we now have the more demanding task of taking forward the 50 Action Points which are necessary if there is to have been any point in all this effort. Every action needs a person or, more likely, people to do it. There is not a rider or driver or worker in equestrianism who is absolved from all responsibility. If you do your bit the Strategy will be a success. If you prefer to leave it all to someone else you lose your right to complain when nothing happens.



Graham Cory
Chief Executive, The British Horse Society
Chairman, British Horse Industry Confederation



Gavin Pritchard-Gordon
Executive Director, Thoroughbred Breeders Association
Vice Chairman, British Horse Industry Confederation



Andrew Finding
Chief Executive, British Equestrian Federation



Julian Marczak
Chairman, Association of British Riding Schools



Claire Williams
Chief Executive, British Equestrian Trade Association



Annie Dodd
Associate Director Industry Liaison, British Horseracing Board



Lesley Barwise-Munro
President, British Equine Veterinary Association

Executive Summary

The purpose of this Strategy is to foster a robust and sustainable horse industry, increase its economic value, enhance the welfare of the horse, and develop the industry's contribution to the cultural, social, educational, health and sporting life of the nation. The Strategy sets out a vision of where the industry aspires to be within ten years, how the different parts of the industry fit into this picture, and how the Government can help it in following this path. The Strategy will be supplemented by an Action Plan, due to be published in early 2006, which will set out who is responsible for taking things forward, the desired final outcome, the current position and the next steps. This will serve as the basis for monitoring progress in the future. It is intended that a progress report will be produced after one year and at suitable points thereafter.

The horse industry can be said to comprise:

- all activities based on the use, possession or ownership of horses, ranging from professional through to leisure; and
- the suppliers of horse-related goods and services for those core activities.

The use of the term 'industry' in this document is intended to emphasise the national importance of these diverse activities, and the many links between them, as well as the shared commitment of participants. The term also covers equine enthusiasts who are not engaged in these pursuits full-time, and is intended to include the many recreational riders, horse-owners and others who do not see themselves as part of an industry in the traditional sense.

The horse industry is a significant economic force. Estimates suggest that:

- Its gross output is £3.4 billion;
- It employs up to 250,000 people directly and indirectly;
- 2.4 million people ride;
- 11 million people have some interest in the horse industry, and 5 million an active interest; and
- the horse population is at least 600,000 and could total nearly 1 million.

The industry makes a hugely important contribution to the economy and social fabric of many communities. It is particularly important in (but by no means confined to) rural areas. Current trends, especially in the leisure economy, suggest potential for real growth in the industry. However, some small businesses and riding schools have fallen behind other leisure sectors and may decline even further if they do not become more competitive. The principal requirement for growth over the next ten years is to develop the necessary infrastructure to implement the actions set out in this Strategy. To be successful, the Strategy will need to be fully accepted and actively promoted by the entire horse industry, and supported through positive engagement from Government.

The health and welfare of horses, ponies and donkeys is fundamental to the success of the industry, and underpins the whole of this Strategy. A separate Health and

Welfare Strategy for the Horse, Pony and Donkey is being published by the Government, in conjunction with the British Equine Veterinary Association (as part of the wider national strategy for Animal Health and Welfare) and these two documents are closely linked. Many of the actions within this Strategy for the horse industry will be beneficial to horse welfare, for example, improving pasture management and creating safer grazing land, raising standards of business performance, and promoting higher skill levels within the industry.

Eight interlinked aims have been identified as key to achieving the overall purpose of this Strategy. These eight aims form the basis of the separate Strategy chapters, which include more detailed objectives and specific action points intended to move the industry towards realising the overall vision.

Aim 1: Bring the Horse Industry together and develop its national, regional and local impact

Bring the industry together nationally - Communications between the various parts of the industry have not always been effective. It is essential that disagreement within the industry is overcome and that all concerned begin to work together to promote its further development. As a first step toward this, the Communications Directors of the leading equestrian bodies should come together to share information and build closer relationships. This should enable the industry to develop, over time, a coordinated communications function, and a greater sense of unity.

Develop the industry's regional and local influence - Just as coming together more will greatly increase the industry's national relevance, so greater co-operation at regional and local level will multiply its effectiveness. The industry needs to build its capacity at a regional level and to engage with the growing range of regional bodies which play an increasingly significant role in people's lives. Similarly, at a local level, the industry needs to develop its links with local authorities. On the back of this, the industry should encourage the development of local horse networks to represent and promote grassroots horse interests across the full range of local authority responsibilities, such as access and planning.

Aim 2: Increase participation in equestrianism and develop the social contribution of the Horse Industry

Increase participation in equestrianism - The future of the industry depends on adopting a more inclusive approach and attracting a constant stream of new riders. For most people, the riding school is their introduction to the horse industry, but the quality of this experience can be highly variable. All parts of the industry need to recognise and support the integral role of riding schools as the bedrock for creating and maintaining mass participation. For their part, riding schools need to be professionally-run businesses, offering attractive, efficient and, as far as possible, safe facilities, in order to compete effectively with other leisure activities. To achieve greater participation, and to ensure a high quality riding experience for all, the industry needs to produce a plan for how riding schools can maximise their potential. It also needs to carry out detailed research into the number and location of riders, and into public perceptions of equestrianism in order to identify and address real and perceived barriers.

Work with Government to develop the social, educational and health benefits of association with horses - While it is vital to increase participation for economic reasons, there are other very good reasons for drawing new people into riding, broadening its appeal, and increasing awareness of its potential contribution to wider social issues. These include educational attainment; personal and social development; sport and recreation; physical health and fitness; mental health; disability; social exclusion; and criminal justice. Examples exist of good work being done with equines in all of these areas, but at present these are quite rare and tend to arise from the enthusiasm of a few dedicated practitioners working on a financial shoestring. The horse industry needs to develop its potential in the social, educational and health fields, in order to make a greater contribution in these areas and tap into the significant funding streams associated with them. This will require the industry to engage with the relevant Government departments to persuade them of the real benefits that it can offer in pursuit of their Public Service Agreement aims and objectives.

Aim 3: Boost the economic performance of equestrian businesses

Raise standards of business performance - There are over 18,000 active equestrian businesses in Great Britain. The majority are small- or medium-sized enterprises. Equestrian businesses tend to be run on lower than average profit margins than comparable businesses in other sectors, and have little awareness of how they are performing relative to others. The industry needs to develop a benchmarking system to enable businesses to assess their performance, and to focus on parts of their operations where there is potential for improvement.

Encourage co-operation to improve business opportunities - Equestrian businesses often have little interaction with each other, and are frequently run by people who are driven by an interest in horses rather than in business. The industry needs to ensure that this practical expertise is matched by sufficient business acumen and management skills in order to maximise the potential of these businesses. Targeted continuing professional development in the workplace is necessary for equestrian managers, as is an effective business networking system to share information, experiences and best practice.

Ensure strong links with Development Agencies - In view of their wide-ranging functions and substantial resources relevant to boosting the horse industry's economic performance, it is vital that the industry establishes a regular dialogue with the Regional Development Agencies, so as to highlight the industry's importance and make the most of available opportunities.

Ensure a level fiscal and regulatory playing field - Many people in the industry feel that equestrian enterprises are unfairly hindered by inequitable regulatory barriers to growth and an uneven business playing field. Such disparities, e.g. in relation to VAT, business rates and land use planning, can have a disproportionate effect where businesses are operating on narrow margins. While the Government and the industry do not agree in all cases on the nature, impact or even existence of such disparities, they do agree on the need for the industry to operate as far as possible on a level playing field with other comparable sectors. They also agree that more could be done to encourage consistent application of existing planning

guidance, and on the need to maintain an open and constructive dialogue in order to consider and, if possible, address any real and significant fiscal and regulatory constraints on equestrian businesses that the industry can identify.

Reach an industry view on the status of the horse - Under domestic legislation, only horses that are used to farm agricultural land or are farmed for meat or hides can be said to be agricultural animals. By contrast, European Union legislation treats the horse as a food-producing animal. Many in the industry believe that this situation leaves the industry at a disadvantage, particularly compared to farming. However, this view is not shared by all, and there is a need for the industry to determine whether the status of the horse is a significant issue, and, if so, to establish an agreed industry-wide position and make a convincing case for change.

Address problems associated with insurance and health and safety risk management - Riding is an inherently risky activity. However, in recent years, substantial increases in insurance premiums have caused significant financial difficulties for owners of riding and livery establishments. These problems are in part a reflection of an increasingly litigious society, fuelled by the proliferation of “no win, no fee” cases, and may, in part at least, be addressed through a better understanding of how to manage risk and through more effective record keeping. In addition, a recent House of Lords judgement (Mirvahedy v Henley) has important implications for horse owners, who may now find themselves liable for damage caused by their horses even where they have not been negligent. The industry needs to continue to discuss with Government ways of ensuring that the risks associated with riding are recognised and accepted; help riding establishment proprietors improve the quality of their records; and explore with the Government ways in which the adverse implications of the Mirvahedy judgement might be ameliorated for horse owners.

Enhance the value of equestrian goods and services - Adequate data on the value and growth of the horse industry and its component parts are essential for proper commercial and policy decisions. Current statistics are unhelpful from the industry’s point of view, and work should be undertaken to facilitate the gathering of statistics that will better allow the value of the industry to be assessed. In addition, more needs to be done to promote the UK as a source of quality goods and services, and encourage the use of new and developing technologies to improve business productivity and efficiency.

Increase equestrian tourism - While there is general consensus about the need to increase opportunities for equestrian tourism, there is less agreement about what this means in practice. The industry needs to do more; for example, encourage a cohesive approach to promoting equestrian tourism through local authorities, regional tourism councils and national bodies; publish a national register of riding holidays and equestrian tourism opportunities on the internet; and establish a national descriptive grading system for equestrian tourism.

Aim 4: Raise equestrian skills, training and standards

Attract and retain staff - The horse industry faces major challenges in attracting and retaining sufficient numbers of staff. Career information is not always readily

available to young people, and the nature of the work may not fit easily with conventional lifestyles. The industry needs to develop clear career and qualifications structures, raise training and progression opportunities, improve working conditions, and build closer liaison with careers advisers. Workplace experience should be used more effectively as a means to attract young people into the industry.

Provide an environment in which people wish to build a career - Equestrian business proprietors need a broader range of business-related skills than many currently possess. The industry needs to encourage them to further their skills in human resource management, health and safety and physical resource management. Aside from the Stable Lads Association in racing, employee representation in the industry is limited. The industry needs to consider further whether a demand exists for greater representation and whether it would deliver additional benefits.

Identify skill levels and training needs - Little accurate data currently exists about the skill levels of people working in the industry or about likely future skills requirements. The industry needs to carry out research in order to improve its understanding and preparation in these areas.

Improve opportunities for work- and college-based learning - There is concern voiced by some about the content of some college and non-vocational training courses. There is a need to develop closer working between industry-based training providers and colleges, more flexible funding arrangements, and better training and career pathways.

Aim 5: Increase access to off-road riding and carriage driving

Ensure a joined up and well maintained network of public rights of way - Strong concerns exist about the current arrangements for identifying, securing, delivering and protecting statutory rights of way. Progress is being made through initiatives such as Discovering Lost Ways and Rights of Way Improvement Plans, but much more needs to be done. The industry needs a coordinated structure to lead its access interests at a national level; it needs to establish productive links with the organisations which have led the way for walkers and cyclists; and it needs to develop a coordinated plan to improve access for all riders and drivers. At a local level, Local Access Forums need to be developed further so that they can work effectively with local authorities in the delivery of Local Transport Plans which take full account of the needs of equestrians.

Increase provision of other off-road equestrian routes and of areas with equestrian open access - Clear scope exists for farmers and other public and private landowners to provide voluntary access to their land for riding and driving. Bodies like the Forestry Commission need to be encouraged to continue to grant ready access, and a good practice guide needs to be developed to encourage others to pursue similar access projects. The potential of stewardship and other subsidy schemes for encouraging landowners to grant access needs to be explored and disseminated; and toll rides need to be accepted as a legitimate part of the overall access picture.

Continue safety education for motorists, riders and carriage drivers - At least 3,000 road accidents every year involve horses. Fortunately, few involve rider casualties, but work is needed to produce a more accurate picture of the overall equestrian road safety position. This can help to reduce accidents by identifying local blackspots which can be addressed by the highway authorities, and provide valuable evidence to back up local, regional or national road safety campaigns. The Department for Transport has done good work to educate motorists about how they should safely pass horses on the roads, and the industry now needs to continue to work with the Department and the Highways Agency to explore further ways of addressing safety issues, such as inappropriate road surfaces, and promote safety education, to the benefit of both horse riders and car drivers.

Ensure urban and suburban riding and carriage driving is promoted and improved - Riding is often mistakenly seen as an exclusively 'rural' activity. In fact, there is a huge demand for access to safe places to ride on the outer margins of towns and cities, as well as within urban centres. Good examples of urban and suburban riding facilities already exist, but the industry needs to exploit opportunities to promote urban riding and driving, and highlight the need to provide equestrian facilities to serve areas of major new housing development.

Aim 6: Consider the environmental impact of the horse

Improve standards of land management - As well as the positive impact which horses have on the environment, there are also potential negative impacts which need to be managed. The industry needs to work with local authorities and others to promote high standards of pasture management, ensure the continued effective control of ragwort, and secure a more consistent approach to planning. Both industry and Government need to improve their knowledge about where horses are kept, and about the quality of the land used for grazing.

Encourage correct and safe manure storage and disposal - The storage and disposal of horse manure is an ongoing issue for horse owners. The spreading of horse waste is currently considered by the Environment Agency to be a low risk waste and is dealt with under its Low Risk Initiative. A recent European Court of Justice ruling that livestock effluent may not be classed as a 'waste' when it is used as a soil fertiliser, should also have beneficial effects for the horse industry. However, there is a need to develop and disseminate clear and practical advice on safe and correct means of waste storage, composting, disposal and spreading.

Encourage the use of horses in conservation grazing project which support wildlife and pasture biodiversity - Well managed equines can be good for wildlife on meadows and pasture. There are 75 conservation schemes operating in England and Wales, which use native pony breeds to help keep hill vegetation open by eating rough grasses. These schemes not only capitalise on the strengths of the native breeds but also help to secure their future. A range of guidelines exist to support conservation projects, but there may be scope to review these to produce a consolidated good practice guide.

Aim 7: Encourage sporting excellence

Extend coaching development programme - Great Britain is already successful in many areas of equestrian sport, but the industry needs to work hard to maintain this position, both in the international equestrian arena and in the public's sporting consciousness. The 2012 Olympic Games represent a major opportunity to develop equestrian sport at all levels. The British Equestrian Federation (BEF) is developing a unified Coaching Development Programme, which will help to raise standards throughout the industry.

Improve the standard of facilities - High quality facilities are fundamental to successful performance, and the BEF is leading on the development of a strategy to encourage the improvement of equestrian facilities amongst its members. The benefits of this work need to be shared more widely within the industry.

Extend long-term athlete and equine development programmes - Long-term athlete development is used in various sports to help young people reach their full potential. The BEF has such programmes for both young riders and horses, and these should be extended to a wider range of equine organisations interested in encouraging excellence.

Encourage unaffiliated bodies to engage - Many local sporting bodies organise equestrian activities without being linked to their sport's national governing body. Sometimes rules and regulations are not administered well, and standards of insurance and health and safety are not what they should be. Such 'unaffiliated' groups should be brought into the fold to raise standards, give competitors a better experience, and encourage excellence.

Aim 8: Improve the quality and breeding of horses and ponies

Establish lead bodies to assist in the improvement of the quality of horses and ponies - Considerable effort goes into breeding high quality horses and ponies. However, aside from the Thoroughbred Breeders Association, which takes care of the needs of racing, the arrangements for promoting horse and pony breeding are too complex. There is a need to identify and develop lead bodies for the breeding of horses, other than racing thoroughbred horses, which could represent and coordinate the views of the breed societies and other organisations within their ambit.

Capitalise on National Equine Database to improve breeding - The industry needs a comprehensive national database which can bring together breeding and performance information for the benefit of all. The National Equine Database (NED) is a collaborative project between Defra and the horse industry, which will provide a central source of reliable information on horses bred, owned or registered in the UK. The industry needs to give its full support to the project, and to take full advantage of the benefits it can offer.

Raise standards in studs - Concerns exist about the standards and record keeping of some studs. The Breeders Quality Mark Scheme offers an opportunity to rectify this situation, and the breeding industry needs to rally around the scheme as a common industry standard. Work needs to be done to support breeders in order to

retain their expertise: schemes such as Premium Mare Designation should be considered as ways of recognising quality outside of the thoroughbred field.

Balance genetic improvement with genetic diversity - The drive for genetic improvement needs to be balanced with maintaining genetic diversity, ensuring the genetic 'fitness' of the national herd and maintaining the gene pool.

Conservation of native and indigenous horses and ponies - The UK has a unique range of native pony types. As well as forming a significant element of the equine breeding sector, they contribute to conservation and tourism, and are very popular animals for riding and driving. Work needs to be done to promote greater recognition of the role that native horses and ponies play in these fields.

Training of young horses - There is no value in breeding quality horses and ponies unless they are trained to their optimum performance in whatever role they find themselves. Encouragement must be given to those engaged in the training of young horses to enable them to produce horses that perform to the best of their physical ability.

Introduction

The purpose of this Strategy

1 The purpose of this Strategy is to foster a robust and sustainable horse industry, increase its economic value, enhance the welfare of the horse, and develop the industry's contribution to the cultural, social, educational, health and sporting life of the nation. The Strategy sets out a vision of where the industry aspires to be within ten years, how the different parts of the industry fit into this picture, and how the Government can help it in following this path.

Vision for the Horse Industry

2 The British Horse Industry Confederation (BHIC) and Government share a vision that within ten years the horse industry will have developed substantially from its current position, that the fragmentation that has impeded its progress in the past will have been resolved, and that equestrianism will be duly recognised as a successful and significant business, sport and leisure activity.

This vision is that, by 2015:

- opportunities for riding for people of all ages and competences will be widespread, participants will be numerous and diverse, and the activity will no longer be perceived as exclusive, elitist or prohibitively expensive;
- this growth will be underpinned by a nationwide network of high quality, professionally managed and financially secure riding centres;
- riders and drivers will have access to an extensive, high quality, safe and secure network of statutory and non-statutory off-road routes;
- the horse industry will present a single, unified and influential front in pro-active support of the wide range of interests it covers;
- the industry will have further established itself as a significant business sector and be widely recognised as making a substantial contribution to national and regional, rural and urban economies, to the social and cultural life of the nation, and to a sustainable and well-managed environment;
- equestrian sports will have a central place in the nation's sporting consciousness, based on high profile national and international sporting achievements (including success at the 2012 Olympics), and be frequently and positively reflected in regular and mainstream media coverage; and
- Britain's position as a world leader in equestrianism and breeding will be cemented; its unique equestrian heritage will be protected and celebrated; and its reputation as a nation of responsible and competent horse owners and breeders will be enhanced through still higher standards of equine health and welfare.

3 It is hoped that this Strategy, and the separate but associated Health and Welfare Strategy for the Horse, Pony and Donkey, will make a major contribution towards realising this ambitious but, we believe, achievable vision. However, this will require the continued, positive efforts of everyone interested in horses or engaged in horse-related business. The BHIC and Government were delighted with the

constructive approach that characterised the responses to the consultations undertaken in preparing this document and look forward to seeing similar levels of support from all parts of the horse world in implementing the action points contained in this Strategy, and taking forward this vision.

The nature of the horse industry

4 The horse industry is more varied than almost any other sector. Essentially, it can be divided into two parts:

- activities based on the use, possession or ownership of horses; and
- suppliers of horse-related goods and services for those core activities.

5 Activities forming the core part of the industry range from professional through to leisure. In between lie many semi-professional riders, and participants whose interest is split between earning a living and pure leisure activity.

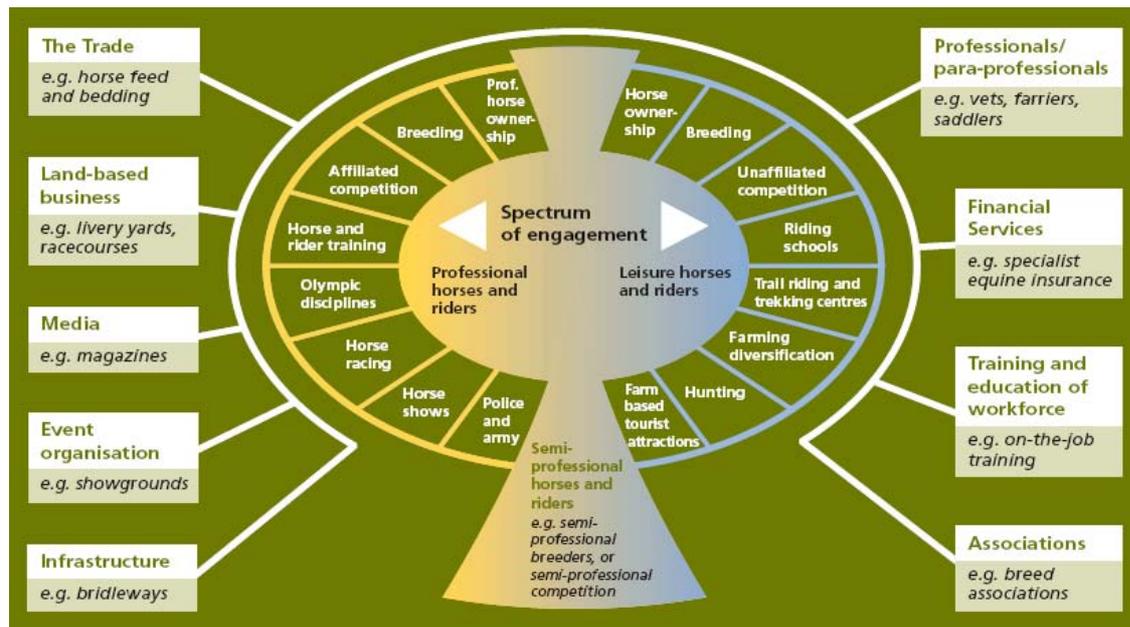
6 The industry core caters directly for the needs of consumers. The activities geared toward professional riders include commercial breeders, affiliated sports, trainers and racing. The leisure-orientated activities include the provision of riding lessons and hacking, unaffiliated sports and tourist attractions.

7 The other part of the industry is made up of providers of goods and services to the core. Examples include farriery, feed supply, veterinary services, livery yards, venues, tack, workforce training, and insurance.

8 There are also many equine associations, societies, organisations and charities which provide services and a focal point for their members and cover a variety of different interests and concerns. Welfare organisations and charities form an integral part of the industry and are active in providing information and guidance, as well as providing services and remedial care for horses, ponies and donkeys.

9 The use of the term 'industry' is intended to emphasise the national importance of these activities taken as a whole, and the many links between them, as well as the shared commitment of those who participate in them. It is not intended to exclude the many equine enthusiasts who are not engaged in these pursuits full-time, some of whom may not see themselves as part of an industry in the conventional sense but rather as belonging to a looser horse confraternity or primarily to a specialist equine group. The term 'horse' includes ponies and donkeys, while 'rider' includes carriage drivers and vaulters.

10 The following diagram illustrates how the various parts of the industry relate to each other.



(Please note that the sector labelled above as ‘Associations’ is intended to include all types and sizes of organisation, charity, society or group with an interest in horses.)

The extent of the industry

11 In March 2004, Defra and the BHIC published research on the horse industry in Great Britain¹, with the National Assembly for Wales and the Scottish Executive. This estimated the industry’s gross output² at £3.4 billion. While this figure was based on the limited data available, and is not as robust as those for other industries, it suggests that the horse industry is even more considerable than many would have thought.

12 Other estimates derived from existing data are:

- the horse industry employs 50,000 people directly and up to 200,000 people indirectly;
- 2.4 million people ride;
- 5 million people have an active interest in the horse industry;
- 11 million people have some interest, including watching horse racing on television; and
- the current horse population is at least 600,000 and may total up to 1 million.

¹ A Report of Research on the Horse Industry in Great Britain, prepared by The Henley Centre, March 2004. See www.defra.gov.uk/rural/horses/topics/research.htm

² In simple terms, this is the market value of total sales of horse-related goods and services produced in Great Britain each year. To give an example, gross output in the car manufacturing industry is what people spend on buying cars and spare parts; gross value added (GVA) is gross output minus what the car industry buys in from other industries. GVA is the more useful figure in determining what an industry is worth, because it equals the incomes directly earned within it. Unfortunately, there is not the necessary information to give the GVA of the horse industry.

Equine Health and Welfare

13 The health and welfare of horses, ponies and donkeys is fundamental to the industry's future growth and is vital to all eight strategic aims. The horse industry must continue to acknowledge that good health and welfare are intrinsic necessities in all aspects of its activities, and ensure that health and welfare considerations are core to any training or education conducted in the horse industry.

14 Because of its special position, equine health and welfare is the subject of a separate but related Health and Welfare Strategy for the Horse, Pony and Donkey. That strategy is being developed as part of the Animal Health and Welfare Strategy for Great Britain and will be published, following consultation, in 2006.

15 An industry working party, led by the British Equine Veterinary Association, has developed a draft strategy³, which was published for consultation on the 24 August 2005. The objective of that document, which is complementary to this Strategy for the horse industry, is to achieve a demonstrable and sustainable improvement in horse, pony and donkey health and welfare, particularly in areas where suffering currently occurs.

The vision for the Health and Welfare Strategy for the Horse, Pony and Donkey is that by 2015:

- All equids should enjoy good standards of health and welfare.
- All individuals responsible for the health and welfare of equids will possess sufficient knowledge to meet effectively their responsibilities and fulfil the duty of care.

16 The use of horses, ponies and donkeys defines many aspects of their management and many of the general risks to which they are exposed, and hence influences their health and welfare status. The draft strategy recognises this fundamental determinant and its importance in identifying how health and welfare issues should be addressed.

A number of aims are identified within the draft strategy, including:

- to establish or confirm the current health and welfare status of the different populations, especially the leisure sector;
- to identify research priorities and funding sources for them;
- to review the case for further or revised regulation, voluntary or statutory, in particular relating to transportation, tethering, livery yard operation, sanctuaries and carcase disposal;
- to ensure adequate effective disease surveillance and control;

³ See www.defra.gov.uk/animalh/ahws/ehws/index.htm

- to support and promote responsible breeding;
- to maintain the continued availability of equine medicines;
- to identify and address issues related to the permanent physical identification of equines by microchips;
- to implement successfully the National Equine Database;
- to re-examine current advice on health and welfare standards;
- to establish what education and training currently exists and to ensure that programmes support all key objectives; and
- to enforce standards of health and welfare where irresponsible owners are unwilling to follow voluntary advice.

17 The draft strategy presumes that horse, pony and donkey health and welfare reflects the Farm Animal Welfare Council's five freedoms⁴. The strategy also acknowledges that levels of equine health and welfare in England and Wales are generally high and notes that current standards for welfare are described in the Equine Industry Welfare Guidelines Compendium for Horse, Ponies and Donkeys, (2002)⁵.

ACTION 1: To achieve and maintain a high standard of equine health and welfare

Action : To achieve and maintain a satisfactorily high standard of animal welfare throughout the horse industry, through successful implementation of the Health and Welfare Strategy for the Horse, Pony and Donkey, and through industry support to dedicated equine welfare organisations.
Responsibility : The whole horse industry.
Priority : On-going.

18 It is noted that welfare organisations are in their own right an integral part of the horse industry, with the total annual turnover of equine charities estimated at £61 million. They are a significant consumer and producer of equine services and many are major tourist attractions.

⁴ www.fawc.org.uk/freedoms.htm

⁵ The Equine Industry Welfare Guidelines Compendium for Horse, Ponies and Donkeys
www.adas.co.uk/equinewelfare/compendium.pdf

The importance of the industry

19 The significance and potential of the horse industry itself, and of the benefits it brings to the life of the nation, are only now being fully recognised. As the figures demonstrate, the industry makes a hugely important contribution to the economy, as well as to the social fabric of many communities. Given the geographical distribution of the industry, it is particularly (but not exclusively) important in rural areas. Participation in equestrian sport and other riding activities promotes health and well being, including helping to combat the growing problem of obesity; contributes to the education of many young people, helping them to develop both independence and a sense of responsibility; fosters volunteering, community development and social inclusion; and helps care for the land and the environment. The Government and the industry will continue to work in partnership to maximise these benefits.

The future of the industry

20 The research carried out by the Henley Centre, also investigated the industry's prospects. It concluded that current trends, especially the leisure economy, suggest the potential for real growth. However, some small businesses and riding schools have fallen behind other leisure sectors and may decline even further if they do not become more competitive.

21 On 18 February 2005, a ban on the use of dogs to hunt wild mammals came into effect in England and Wales. In drafting this Strategy, the merits or otherwise of a ban have been consciously avoided and over time the effects of a ban, on this Strategy, will be monitored and consideration will be given to any necessary revisions to the action points.

22 The Government is planning the abolition of the Horserace Betting Levy in 2009 and intends that it be replaced by commercial arrangements between the Racing and Betting Industries. The Levy is the statutory mechanism for collecting an agreed percentage of bookmakers' gross profits which is then distributed within the racing and wider horse industry. An independent review group is currently seeking to identify a sustainable and enforceable replacement mechanism, taking into account recent court judgements in respect of database rights. This would aim to provide continued funding for key purposes such as the improvement of horseracing (e.g. integrity, racecourse improvements, prize money and staff training), the advancement of veterinary science and education, and the improvement of breeds of horses (thoroughbreds and rare native breeds).

23 The Henley Centre research also observed that the horse industry is diverse, with communication between the various parts not always very effective. It is essential that disagreement within the industry is overcome and that those with an interest in the industry begin to view it as a partnership. The principal requirement for growth over the next ten years is to develop the necessary infrastructure to build and implement a successful Strategy that is actively promoted by the entire horse industry.

24 The horse industry will also need to take full advantage of developments over the next few years, not least the creation of Natural England which will bring together,

and enhance, the conservation and environmental protection work of English Nature, the recreation and access responsibilities of the Countryside Agency, and the environmental land management functions of the Rural Development Service⁶. This important new body is expected to come into being in 2007, although its various elements are already working increasingly closely together, and it will be a potentially major partner of the industry as it seeks to realise its vision.

The preparation of this Strategy

25 The British Horse Industry Confederation (BHIC) is the umbrella body formed to represent the industry's views to Government. It has led in developing this Strategy, in cooperation with Defra's Horse Industry Team. Without the voluntary dedication and commitment of the members of the BHIC this Strategy would not exist.

The steering group which has overseen preparation of the Strategy and has dedicated considerable time and resources to its completion has involved:

British Horse Industry Confederation : Fiona Birt-Llewellyn, Duncan Brown, Graham Cory, Annie Dodd, Andrew Finding, Pat Harris, Margaret Linington-Payne, Cathy McGlynn, David Mountford, Lesley Barwise-Munro, Tristram Ricketts, Graham Suggett and Claire Williams.

Defra : James Bradley, Tony Williamson, Des Coles, Amy Westaway and Alice Elliott.

Welsh Assembly Government : Fiona Leadbitter.

26 Defra's Horse Industry Team supports the Minister for the Horse Industry by drawing together the various strands of Government responsibilities affecting the industry. Defra is broadly responsible for equine affairs in England. The Department for Culture, Media and Sport is responsible for policy on equine sport, racing and tourism. The Welsh Assembly Government is responsible for equine matters in Wales.

27 The process of preparing the Strategy was intended to be as inclusive as possible. Following publication of the research, which itself investigated strategic issues, views on the way ahead for the industry were sought from some 300 organisations and individuals. A national conference was arranged, involving over 150 participants from all parts of the industry. Various industry representatives were then charged with bringing together the conclusions, consulting further and developing the draft Strategy document. The draft Strategy was published in February 2005 for consultation. This prompted many responses from individuals, and organisations of all shapes and sizes. This final Strategy has been re-drafted in light of these responses.

⁶ See - www.defra.gov.uk/rural/ruraldelivery/natural-england.htm - please note that all references to English Nature or the Countryside Agency in this document should be read as referring to Natural England from 2007.

Strategic aims

28 Eight interlinked aims have been identified as key to achieving the purpose set out in paragraph 1 above:

- to bring the horse industry together and develop its national, regional and local impact;
- to increase participation in equestrianism and the social contribution of the horse industry;
- to boost the economic performance of equine businesses;
- to raise equestrian skills, training and standards;
- to increase access to off-road riding and carriage driving;
- to consider the environmental impact of the horse;
- to encourage sporting excellence; and
- to improve the quality and breeding of horses and ponies.

29 The following chapters present supporting analysis, a set of objectives to contribute to achieving each aim, and specific actions proposed to accomplish these objectives. They indicate where ever possible, who will be responsible for taking each action and the level of priority⁷. An action plan will be published in early 2006 to support this Strategy and to provide a tool to monitor its success over the coming years.

⁷ 'Short-term' = within one year, 'medium-term' = between one and five years, 'long-term' = between five and ten years. 'On-going' is used in some cases to reflect the fact that these actions are already progressing and by their nature, have no specific end date.

Aim 1: Bring the Horse Industry together and develop its national, regional and local impact

1.1 For such a significant sector, the horse industry has not achieved the widespread recognition and substantial influence that it merits, despite some recent advances. As a result, it is not yet best equipped to achieve many of the aims of this Strategy, such as increasing participation, improving economic performance, influencing local, regional and national policy-making, gaining its full share of the national sporting consciousness and securing the long-term future of its native breeds. A message that was reinforced in the consultation on the draft Strategy was that, if it is to achieve these aims, the horse industry needs to put its own house in order. This will require significantly greater cooperation between the various elements of the industry, a greater awareness of the context within which the industry operates and a determined effort to improve its local, regional and national impact.

1.2 There is a strong belief within the industry that it is seriously divided internally, reflected in particular by the fact that communication between its strands in the past has ranged from patchy at best to virtually non-existent. The Henley Centre report in 2004 highlighted this as one of the main reasons why the industry is not achieving its potential. The report suggested that, without a good internal consultative structure, there was little chance of the desired repositioning being attained.

1.3 While it is recognised that each distinct interest group within the industry has the right to organise and represent itself, there is also a responsibility to cooperate with other groups with similar interests. The industry needs to act together as a whole in order to punch its weight. The view of the industry's representatives is that there is neither a need nor an intention to establish any kind of new umbrella body. However, the progress which has been achieved through the formation of the British Horse Industry Confederation (BHIC) as a forum for bringing together the leading figures from the key industry organisations needs to be built upon further, so that the industry can break down the barriers of the past and seize the opportunities available to it in the future.

(a) Bring the industry together nationally

1.4 The industry would gain immeasurably from greater cooperation at a national level. The BHIC has made significant progress in this regard, but much more needs to be done. The aim must be for all established industry bodies to work closely together to coordinate activities which achieve measurable improvements within the next ten years in areas such as:

- promoting equestrian activities, including riding and equestrian sports, more effectively and increasing participation;
- raising the profile of the industry and its organisations;
- increasing its media coverage and influence, including coverage of national and international sporting achievements;
- enhancing the industry's contribution to the national and rural economy and to wider society;

- widening recognition of Britain's position as a world leader in equestrianism and breeding, and her unique equestrian heritage; and
- increasing awareness and appreciation of the industry's concerns.

1.5 Achieving this requires all industry organisations to commit themselves to:

- enhancing communications within the industry;
- coordinating the marketing and image of the industry as a whole;
- coordinating policies;
- organising the sharing of knowledge and resources;
- collecting information from all organisations into one resource; and
- agreeing a lead organisation, where possible, for each of the individual actions in this Strategy, and support them in their task.

It is clear that some of these objectives are more immediately achievable than others and, in order to build relationships and overcome past conflicts, it will be necessary to proceed in measured stages, beginning with a coordinated approach to sharing and disseminating information. Later perhaps, once progress has been assessed, more sophisticated joint marketing enterprises might be developed.

1.6 A first step on this road will be to bring together the communications directors of each of the key industry bodies for regular meetings to discuss current issues, agree coordinated approaches to common problems and consider further ways in which the public face of the horse industry might be simplified, enhanced and promoted.

ACTION 2: Develop a Horse Industry Communications Network

Action : Initiate a programme of regular meetings between the Communications Directors of key industry bodies.
Responsibility : The BHIC, in partnership with the other industry signatories to this strategy.
Priority : Short-term.

1.7 Subject to further agreement and the availability of resources, this network would form the basis of the central industry communications function proposed in the consultation draft of this Strategy and widely welcomed by respondents. This function would aim to:

- provide a common media access point;
- provide access to information on associations, approved riding schools, licensed livery yards, events, tourism, equine charities, education and training, suppliers etc;
- draw attention to sporting success and other horse-related issues;
- coordinate access to help, advice and information on best practice to equestrian businesses and riders on issues such as human and equine health and safety, business management, access to funding schemes, rates and land use planning, statistics etc;

- increase awareness among equestrian businesses of the opportunities afforded by the national, county and local show circuit, the British Equestrian Trade Association's International Trade Fair and foreign trade fairs;
- support the development of a regional structure and local horse networks (see Actions 4 and 5);
- act as a conduit for enquiries from within the industry and from the public;
- help to promote high standards of horse welfare throughout the industry;
- help to disseminate information about wider issues affecting the industry and promote a greater understanding of the potential benefits of greater engagement; and
- (possibly) provide a mechanism for emergency consultation of the industry in case of events such as an outbreak of contagious disease.

The precise mechanism for achieving this function would require further consideration. It may, for example, involve the creation of a jointly-owned and managed industry website or some other integrated activity, involving shared and pooled resources.

ACTION 3: Achieve effective two-way communications

Action : Explore the development of an effective central industry communications function to enhance the communication, public relations and information structure for the industry and promote equestrian issues and participation.
Responsibility : The network of horse industry communications directors, under the aegis of the BHIC, in partnership with the other industry signatories to this strategy.
Priority : Short- to Medium-term.

1.8 In addition to improving the public face of the horse industry through more coordinated communication arrangements, the horse industry needs to consider ways in which it can bring together other aspects of its work in order to improve efficiency, reduce duplication and eliminate unnecessary competition and potential conflict. One way of achieving this could be to develop a National Equine Centre which could provide a focal point for the horse industry in England and Wales. The racing industry's base is seen as Newmarket, and the concentration of racing businesses, services and organisations in this area has proved of enormous benefit to it. A National Equine Centre could not only bring together racing and non-racing interests but also provide a focal point for equestrian promotion, competition, business advice and tourism. The Royal Agricultural Society for England is developing a proposal for such a centre at Stoneleigh in Warwickshire, in partnership with horse organisations, with the active interest of public bodies. The horse industry will need to consider how to respond constructively to this proposal as and when it is brought forward.

(b) Develop the industry's regional and local influence

1.9 Just as closer working more will greatly increase the industry's national relevance, so greater co-operation at regional and local level will multiply its effectiveness. It will help to increase participation, to broaden engagement, to encourage development of resources, and to secure better provision for existing and potential riders as well as equestrian businesses. It will enable the industry to boost awareness of its products, have more influence over potential partners, and allow grassroots equestrians greater involvement in issues which affect them.

1.10 The horse industry is a significant player in all of the English regions and in Wales, and some elements of the industry have a particular regional association, such as racing in East Anglia. National and European-level policy is increasingly to devolve power and finance to the regional level, and the horse industry needs to ensure that it is recognised as a serious regional force in order to take advantage of this process.

1.11 Many national equestrian bodies have a regional structure, using boundaries of their own choosing. To maximise the effectiveness of the whole industry, these boundaries should be re-aligned to match those of the Government Offices for the Regions and Regional Development Agencies (RDAs). Industry organisations, where appropriate, will need to appoint regional development officers from within their existing staff to coordinate the various activities within each region and create effective links with the RDAs, Regional Assemblies, Sport England regions and other regional bodies and operations.

1.12 Changing the industry's regional structures will not, of course, by itself deliver greater regional impact, but it will allow the industry to engage more effectively with the growing and increasingly important range of regional policy and delivery organisations, such as the RDAs and Regional Assemblies. It will also allow the industry to have an influence on the development and implementation of the regional rural development frameworks which are bringing together key organisations with a mission to identify clear priorities for rural delivery reflecting regional needs. Another group of important regional bodies with which the industry needs to engage are the Regional Rural Affairs Forums, which provide grassroots stakeholders with a voice to influence regional policy making and service delivery, and which have a direct link into national policy-making through regular meetings between their chairs and Government Ministers. People with equestrian interests are already represented on the Forums, including at chair level, but these links have not yet been developed and exploited to the benefit of the industry.

ACTION 4: Develop the horse Industry's regional influence

Action : Establish an effective regional structure for the industry and develop a productive dialogue with key regional bodies, including the RDAs, to promote the industry's interests and build its contribution to regional priorities.

Responsibility : BHIC to lead assisted by other industry signatories to this strategy.

Priority : Short- to Medium-term.

1.13 Parallel to developing the industry's regional impact, work needs to be put in hand to increase its local influence. In particular, it is vital that local authorities are encouraged to take greater notice of horse owners and riders and equestrian businesses in their areas. In particular, those local authorities, in rural, urban and sub-urban areas, which have not yet recognised the value of engaging with the horse industry need to be encouraged to do so across the full range of mutual interests. Several highly successful networking initiatives have been undertaken locally, for example in Leicestershire where some excellent progress has been made, and in other parts of the country, where equestrian groups have come together for specific reasons, such as horse shows, or more general purposes based on their shared interest in horses and riding.

CASE STUDY - Woodhouse Eaves and Swithland Recreational Riding Association

This is a group of riders, liveries, and a riding school within two adjacent parishes in Leicestershire. It was formed through local equestrians recognising the need for local responsibility. In less than a year it has gained around 100 members, negotiated more off-road access and horse warning signs, helped develop the local Parish Plan, and started looking at action with the local Riding for the Disabled Association.

CASE STUDY - Broadstairs and St. Peters Annual Horse Show

The show makes full use of the regional press, usually gaining front-page coverage. In 2002, the local BBC station broadcast live coverage. The organisers believe this level of publicity is essential, not only to provide a successful horse show for local riders but also to develop equestrian awareness among the public at a local level.

1.14 Local networks offer an opportunity for the industry to work in partnership with local authorities and bodies, such as chambers of commerce, so as to:

- advance equestrian interests;
- discuss local equestrian issues (for example planning, tourism or input to Local Access Forums);
- draw up local equine plans in order to promote sustainable growth;
- encourage greater participation by, for example, creating links with schools and colleges;
- play into wider local developments, such as Sport England's local community sports networks; and
- provide the vehicle to help Government achieve its social and public service agendas through the strengths of the industry.

They have the potential to speak for local riders and equestrian businesses, conduct consultations, feed back information to the central industry bodies and work with riding schools and centres to enhance the horse's contribution as an asset to the local community.

CASE STUDY - Leicestershire Equestrian Enterprise Partnership

The Partnership works with Leicestershire County Council, meeting monthly to discuss matters of mutual interest. Together they devised the Leicestershire Equestrian Strategy, to develop local networking implemented by a specially appointed officer. This has spawned even more local groups, which benefit from the generation and dissemination of information and the encouragement of best practice among local authorities and other partners.

1.15 The knowledge and best practice gained from these initiatives should be collated and made available to all parts of England and Wales, and similar schemes should be encouraged elsewhere. Initial discussions with representatives of local authorities who expressed an interest in working with the industry on this issue have suggested an appetite for building a long-term relationship, and that a helpful initial development might be the staging of a national event which would bring together local authorities, from both rural and urban areas, in order to cement the place of equestrianism at a local level and encourage and support the development of effective local horse networks wherever sufficient demand exists.

ACTION 5: Promoting Local Horse Networks

Action: Work with local authorities and the Local Government Association to develop a framework for the creation of local horse networks where sufficient demand exists.

Responsibility: BHIC to lead assisted by other industry signatories to this strategy.

Priority: Short- to Medium-term.

Aim 2: Increase participation in equestrianism and develop the social contribution of the Horse Industry

(a) Increase participation in equestrianism

2.1 The initial consultation exercise made clear that, while the horse industry believes that it is capable of expanding significantly in the growing leisure economy, progress is being hindered by the perception that riding and/or horse ownership is expensive, elitist and sometimes unwelcoming to newcomers. Those from a non-horsey, and particularly an urban, background report difficulty in becoming involved and feeling accepted. It would be difficult to guarantee that everyone's experience of riding schools and other equestrian establishments is uniformly welcoming, although that should certainly be the ambition. As far as the cost of learning to ride is concerned, the reality is that spending on riding lessons is broadly in line with spending on other leisure pursuits such as golf or tennis lessons, and that horse riding generally is no more expensive than many leisure activities.

2.2 The industry must take every opportunity to generate interest, and to convert interest into enthusiasm, and enthusiasm into participation. The future of the industry depends on adopting a more inclusive approach and attracting a constant stream of new riders. Developing the industry's communications arrangements will help, but it is just a start. It is crucial that people's first-hand experience of equestrians and equestrian enterprises, particularly riding schools, is a positive one.

2.3 For most people, the riding school is their introduction to the horse industry. If this experience is good, a life-long involvement is born. If it is not, then a potential participant (and advocate) may be lost forever. Moreover, a significant proportion of riders do not own horses, and rely on riding schools to continue in equestrianism. Riding schools can offer a wide range of activities, not just teaching. Often hacking and/or livery are offered from the same premises: 'riding centres' could perhaps be a more accurate description, and be one that is more attractive to adults.

2.4 All equestrians, and all parts of the horse industry, need to recognise and support the integral role of riding schools, as the bedrock of the industry, in creating and maintaining mass participation. Reinforcing their role is a vital accompaniment to the other measures proposed in this chapter to help increase participation. The Henley Centre report found that riding schools are sidelined within the industry, to the detriment of social inclusion and potential sporting excellence. Riding schools offer everyone the chance to ride. They should be promoted as an asset for the local community, like sports clubs or leisure centres. They should act a feeder into top sport, in the same way as, say, local gymnastics or athletics clubs. They can also be a focus for the entire local equestrian community and its activities, including equine education, welfare promotion and career recruitment. They might link positively with the thriving riding clubs which exist in many areas⁸.

⁸ There are currently 440 riding clubs affiliated to the British Horse Society, encompassing 38,000 members. There are many more clubs which are not affiliated. Affiliated clubs encourage members to give their time in support of others, as well as enjoying the network of support and knowledge that comes with being part of a club. Horses in riding club homes benefit from the horse welfare education the affiliation system provides. The system

CASE STUDY - National Riding Festival

The National Riding Festival was started in the 1990s, after the British Equestrian Trade Association's first national equestrian survey suggested a decline in the number of riders. The Festival was established to stimulate new and lapsed interest in riding. It offers the opportunity for the many different components of the industry - including the trade, riding schools, representative bodies, riding disciplines, equine welfare bodies and breeders - to work together to increase participation and thus secure the future of the industry. An important aspect is to give school children the chance to experience riding using "Trigger" the mechanical horse. This activity is supported by a teacher pack linked with the national curriculum, and offers the opportunity to establish links between primary schools, riding schools and local equestrian retailers.

2.5 For their part, riding schools need to be professionally-run businesses. They need to offer attractive, efficient and, as far as possible, safe facilities, in order to compete effectively with the range of other modern leisure activities. Some riding schools have developed to offer additional services which also provide an extra source of income, and some have also embraced modern technology by developing websites, which can be an important communication tool in an increasingly internet-based society (see case study on Blackdyke Farm). The financial pressures on riding schools, and the consequent closures, are well known. Aim 3 discusses business and management skills, and rating and insurance issues; and Aim 4 looks at industry skills, training and standards considers how to attract and retain staff. The actions proposed in those sections should help riding schools to develop into the pro-active, open and inclusive riding centres that a 21st century horse industry needs at its heart.

CASE STUDY - Blackdyke Farm Riding Centre in Carlisle, Cumbria.

Blackdyke farm is a family-run riding centre which was started in 1980, and now has over 40 horses and just under 400 regular clients each week, a thriving Pony Club, Riding for the Disabled and weekly affiliated and unaffiliated competitions. The riding centre offers many facilities, including two indoor arenas, a heated viewing gallery, a cross country course, training for BHS and other qualifications, and an indoor heated swimming pool. Additional income is gained from hiring out of the arenas and swimming pool (which is regularly used by a local special needs school) as well as from the livery facilities and regular competitions and clinics. The centre has developed an easy to use, well planned website which gives information on tariffs, facilities, staff and up-coming events. This not only advertises the centre's facilities, but makes it more accessible and enables prospective clients to research the centre first, and for existing clients to post notices and keep up to date with current developments and news – see www.blackdykefarm.com

has a clear progression from the novice horse and rider taking part in local club events, through the area qualifiers to national championships at various levels.

ACTION 6: The role of riding schools

Action : To produce a costed and time limited plan for how riding schools can more effectively maximise their potential (perhaps exploring the possibility for developing riding schools into community riding centres which would act as local 'horse hubs') in both rural and urban locations.

Responsibility : The British Horse Society (BHS) and the Association of British Riding Schools (ABRS), in partnership with the other industry signatories to this strategy, with advice from Defra if required.

Priority : Medium-term.

2.6 More reliable data is needed on the number and location of existing riders. This is central to defining the market and the turnover of the industry. It is also important to gather information on people's perceptions of equestrianism, and their reasons for taking part or not taking part (including dropping out). These influence the level of participation and the potential for increasing it, as well as the prospects for equestrian enterprises. The industry, therefore, needs to undertake more research about who participates, where and why.

ACTION 7: Research participation in riding

Action : Research number and location of riders, and public perceptions of equestrianism.

Responsibility : British Equestrian Trade Association (BETA), with Defra.

Priority : Short-/medium-term.

(b) Work with Government to develop the social, educational and health benefits of association with horses

2.7 While it is vital to increase participation in order to maximise the industry's economic performance, there are other very good reasons why the horse industry should look at drawing new people into riding, broadening its appeal to people who might not otherwise come into contact with horses, and increasing awareness of the relevance of the industry to the wider population. These reasons include:

- **Educational Attainment:** Dealing with horses involves a wide range of everyday physical and intellectual skills, offers an interesting context in which lessons can be taught, and can be an effective means of engaging the interest and improving the attainment of some people who are not generally motivated to learn;
- **Personal and Social Development:** Involvement with horses fosters responsibility and confidence, and is, therefore, good for developing personal and social skills in children and young people;

- **Sport and Recreation:** Riding is a sport which offers as much (if not more) opportunity for enjoyment and physical development as any other, and can be a means of engaging the interest of young people who might not otherwise be interested in sport;
- **Physical Health and Fitness:** Riding is good exercise, which can raise the general level health and fitness amongst participants and, in particular, has real potential to help combat the worrying trend towards obesity amongst children and young people;
- **Mental Health:** Involvement with horses has an established and proven track record of contributing towards the therapeutic treatment of people suffering from short- and long-term mental health problems;
- **Disability:** Riding and driving are already popular activities amongst disabled people, which can provide exercise and enjoyment and well as doing much to combat the risk of exclusion;
- **Social Exclusion:** Involvement with horses need not be confined to people of particular age, race, social or economic groups. Unlike many people, horses do not discriminate, and there is real scope for the further use of horses, ponies and donkeys to promote greater inclusion amongst groups at risk of social exclusion such as long-term unemployed, single parent families and older people;
- **Criminal Justice:** Involvement with horses has been used successfully in both the UK and abroad to engage with and support the rehabilitation of youth offenders, drug addicts and long-term prison inmates.

2.8 Examples already exist of good work being done with horses, ponies and donkeys in all of these areas, but it is at present a comparatively marginalised activity, frequently based on the enthusiasm of a few dedicated practitioners working on a financial shoestring with limited numbers of people able to benefit. The horse industry needs to develop its potential in the social, educational and health fields, not only because it has so much to offer, but also because all of the above areas reflect, to one degree or another, Government priorities and, as such, attract funding which can have a knock-on beneficial effect on the industry. A struggling riding school, for example, with spare capacity in midweek could benefit financially from engagement in a social, educational or health project as well as contributing significantly to the well-being of its local community. Government departments have clear objectives and performance targets which are described in their Public Service Agreements (summaries attached at Annex A). The horse industry needs to learn about these and engage with these departments to persuade them of the real benefits that it can offer in pursuit of these targets.

2.9 In order to promote this, and to provide some initial basis for discussion, the following paragraphs highlight just a few of the numerous examples of positive benefits which engagement with horses can have across a range of educational, social and health fronts. This recognises that the separate policy areas identified are frequently linked closely together and that horse-based approaches rarely focus on only one strand to the exclusion of others.

Promoting Educational, Sporting and Personal Development

2.10 Education is one of the most obvious areas where a mutually beneficial relationship can be developed with the horse industry. Riding is a sporting activity which can be pursued within the physical education (PE) national curriculum, and is already offered by a number of schools in England and Wales. These initiatives, however, have largely been carried out on a piecemeal basis, exploiting local demand and opportunity, and little has as yet been done to link up with broader initiatives such as the national PE, School Sport and Club Links Strategy⁹, being run jointly by the Department for Education and Skills (DfES) and the Department for Culture, Media and Sport (DCMS); and the work being undertaken as part of the DfES' 'Youth Matters'¹⁰ project which seeks to reform services and sporting activities for young people including a requirement for local authorities to provide two hours of sport (per week) outside the curriculum and a further two hours (per week) of engaging activity. Sport England has also set up a group called the National Youth Sports Development Association which includes a range of youth groups and provides a contact point for sport to engage with the youth sector.

2.11 As well as fighting for its place within the limited time and resources available for sport in schools, equestrianism has much to offer in support of other aspects of the National Curriculum. The British Horseracing Education and Standards Trust has been running a successful education programme for a number of years. The programme is attracting an ever increasing number of teachers willing to add a different dimension to the National Curriculum, and the enthusiasm of the pupils has been remarkable. From racing's point of view, the potential benefits are a stimulation of interest in the sport as a leisure activity and as a career opportunity.

CASE STUDY - Racing Education Programme

Since its inception in 2000, Racing's Education Programme has grown from strength to strength, enjoying rapid expansion, enthusiastic participation by schools and racing alike, with excellent feedback from teachers, pupils and others in the education sector. National Curriculum areas covered by activities based on the racing industry include maths, science, literacy, history, art, geography, French, business studies, design and technology, hospitality and catering and sports tourism. The programme has established an infrastructure enabling it to reach over 8,000 schoolchildren each year covering an age range between 4 and 18 years old. It allows young people to become more aware of the industry both as a spectator sport and a potential career path, as well as creating meaningful, stimulating and innovative ways of providing learning opportunities.

2.12 In addition to the opportunities that the horse industry might provide for those in mainstream education, there is a widely recognised role for horses to provide therapy and exercise in special needs provision. There have been some exciting and innovative schemes introduced over the past few years, such as the Fortune Centre for Riding Therapy in Dorset and the BHS Children's Riding Project in Wales, but there is clearly scope for much more to be done.

⁹ http://www.culture.gov.uk/sport/school_sport/

¹⁰ <http://www.dfes.gov.uk/publications/youth/>

CASE STUDY - Fortune Centre for Riding Therapy

The Fortune Centre of Riding Therapy is a college for around 45 youngsters, aged between 16 and 21, with learning disabilities and behavioural difficulties. They are on the Further Education Through Horsemastership course and work towards National Vocational Qualifications and British Horse Society stage one exam. The horsemastership course is funded by the Learning and Skills Council. It uses working with horses to teach life and social skills, such as numeracy, literacy, money management, independent travel, hygiene and home skills. Horses have been found to help motivate young people to learn skills that on the surface seem to have little to do with horses and riding. For example, social skills such as self-awareness become important when riders and horses are all sharing a sand school together, and maths becomes more meaningful when calculating the ratios of different horses' feeds. Some of the young people live in student accommodation and some in a more domestic situation, often close to the yard, and are involved in responsibility for running their own lives. See <http://www.fortunecentre.org>

CASE STUDY - BHS Wales – Children's Riding Project

In 2004/5, two 10 week projects for preliminary horse riding and pony care were organised by the BHS and the South Wales Police. 24 children - the majority with special needs – were taken either to the City of Cardiff Riding School or to Liege Manor Farm Equestrian Centre in the Vale of Glamorgan. The courses, which were funded by a BHS legacy, proved very successful in building self-confidence and motivation among the pupils. The youngsters involved had no previous equine experience but through their commitment and enthusiasm they mastered the basics of horse riding. The supervising teacher said that the change in confidence, attitude and behaviour of the children was remarkable.

Addressing Physical and Mental Health Issues

2.13 Few would disagree with the need to encourage people of all ages to exercise more for the long term benefit of their health and fitness. The physical benefits of riding are obvious to anyone who has ever ridden a horse. At a time when society is becoming increasingly and justifiably concerned with the effects of a sedentary and indoor lifestyle on the health, weight and fitness of young people, the potential contribution of riding should be self evident. However, riding rarely features in any discussion of ways in which young people, or indeed, anyone, can improve their health and fitness, despite some excellent examples of its use in promoting health and physical well-being such as Blackburn and Darwen's "Up for Owl" Programme. This scheme provides challenging and enjoyable physical activities to improve the health and fitness of older people, many of whom have recently been discharged from hospital having suffered strokes or heart attacks¹¹. Riding was specifically added to this programme at the request of its participants. Carriage driving and associated horse care also offer opportunities for valuable but less strenuous physical activities for older people. The horse industry needs to make the case for equestrianism as a mechanism of addressing obesity, coronary heart disease, stress and other health problems. It also needs to ensure that fine words are backed up by ready access to riding and driving opportunities to put those claims into action.

¹¹ Department of Health, Better Health in Old Age Report
<http://www.renewal.net/Documents/RNET/Policy%20Guidance/Betterhealtholdreport.pdf>

2.14 Equine Assisted Therapy (or Psychotherapy) is increasingly recognised as a valuable approach to treating people with a wide range of mental health problems. Such approaches do not necessarily involve riding but instead build on the innate qualities of horses, such as their size and power (which are useful for overcoming fear and developing confidence), their natural sociability and their distinct personalities, attitudes and moods to assist people in overcoming their problems, and have been used to address e.g. behavioural problems, attention deficit disorder, eating disorders, abuse issues, depression, anxiety, relationship problems and communication needs. This work, which has a growing national and international reputation for success, is promoted in the UK by the Equine Assisted Growth and Learning Association (EAGALA)¹², which was formed in 1999 to address the need for resources, education and professionalism in this field.

CASE STUDY - Lords House Farm

Lords House Farm, near Great Harwood Lancashire, is a unique, specialist centre providing a range of activities in the community. Although offering a limited amount of mainstream activities, these serve to enhance and support its provision for disabled and disadvantaged adults and children. The main focus of the charity, founded in 1993, is on providing riding and animal assisted therapy, but also covers an additional comprehensive range of educational and leisure opportunities based around interaction with the natural environment and the creation and management of conservation habitats for wildlife. All who attend Lords House Farm to support its work, either as an employee or a volunteer, gain a great deal of personal satisfaction from watching beneficiaries grow in maturity, self esteem, confidence and develop a range of physical abilities and skills that change their lives. Every year, over 800 disabled or disadvantaged children visit the Farm which has over 60 full time students from 16 to 80 years old. www.lordshousefarm.co.uk

2.15 In addition to providing assistance to people with mental health problems, including through the development of craft skills such as the manufacture and repair of saddles, bridles and other equipment, as well as therapy sessions¹³, there is a long history of horses being used to great effect to support people with disabilities. The Riding for the Disabled Association, for example, undertakes an enormous amount of work in this field, and the Horse Rangers Association and Royal Parks Agency work together to provide riding opportunities for disabled people in Bushy Park in South West London.

CASE STUDY - Riding for the Disabled Association

The Association's activities illustrate the wider benefits which equestrianism can bring to society. Its objective is to provide disabled people with the opportunity to ride or carriage-drive so as to benefit their health and well being. Its 16,000 volunteers provide over 600,000 horse rides and drives a year, for more than 25,000 mentally and physically disabled children and adults. Horse riding and carriage driving offers valuable therapy, enjoyment and exercise, and the chance to communicate with and care for horses and ponies. Riding can significantly aid recovery following a debilitating accident for example, and can help develop and strengthen the use and

¹² www.eagala.org

¹³ Tackling Mental Health Issues Through Enterprise. Small Business Service Research paper, June 2004 (<http://www.renewal.net/Documents/RNET/Research/Tacklingmentalhealth.pdf>)

coordination of muscles and limbs. The volunteer instructors work closely with physiotherapists and other health professionals to encourage every individual to aim for attainable goals, some modest (such as gripping the reins) and others far more ambitious (such as competing at national or international levels). Most of the UK's medallists at the 2004 Athens Paralympic Games started with Riding for the Disabled. www.riding-for-disabled.org.uk

Supporting Social Inclusion and Criminal Justice

2.16 While the value of horses as therapy for the mentally or physically disabled is widely recognised, less well known is their value in the fight to address the causes of crime before young people become drawn into a downward spiral of social exclusion and offending. The Government has put considerable effort and funding, for example through the Big Lottery Fund's Young People's Fund¹⁴, into addressing the causes of youth offending and offering young people activities aimed at diverting their energies and encouraging more positive engagement with their surroundings. There are also some good examples emerging at a local level where Councils, such as Newham¹⁵, Portsmouth¹⁶ and Bradford¹⁷ have used horses to good effect as part of their own programmes to address youth offending and other social problems.

2.17 As well as offering an exciting and effective means of engaging those at risk of social exclusion and criminal activity, the horse industry has much to offer in the rehabilitation of offenders. There are only a few such projects in the England and Wales at the moment, for example the Suffolk Punch Stud (see below) or the work at HMP Guys Marsh¹⁸, although there are many other examples from the US and elsewhere.

CASE STUDY - Suffolk Punch Stud

Since 1938, HMP Hollesley Bay, Suffolk, has operated the largest and oldest stud for Suffolk Punch Horses, a very special and rare breed of heavy working horses. Working on the Stud provides education, training and work skills experience for prisoners which prepares them well for life after release. Particularly for those from disadvantaged groups or from urban backgrounds, this kind of work can open their eyes to future options they may never have considered previously. It is expected that the site will shortly be transferred to the Suffolk Punch Trust, but the workforce will continue to be supplied from amongst Hollesley Bay's inmates.

CASE STUDY - Thoroughbred Retirement Foundation (TRF)

Starting from Wallkill Correctional Facility in upstate New York, the TRF now operates four centres provides the dual benefit of helping horses and people. Prisoners, some of them long term inmates, are taught horsemanship and follow a state-accredited vocational training course, developed by TRF, in horse care and management. This innovative approach has become the prototype for other TRF

¹⁴ http://www.biglotteryfund.org.uk/assets/ypf_general.pdf

¹⁵ <http://society.guardian.co.uk/crimeandpunishment/story/0,8150,1544825,00.html>

¹⁶ Cul-de-Sacs and Gateways – understanding the Positive Futures approach, Home Office, June 2003. Page 14. <http://www.renewal.net/Documents/RNET/Policy%20Guidance/Culdesacsgateways.pdf>

¹⁷ Sports For Life, Bradford and Trident NDC Partnership report, <http://www.renewal.net/Documents/RNET/Case%20Study/Sportslifebradford.doc>

¹⁸ HM Prison Service, Prison Service News <http://www.hmprisonservice.gov.uk/prisoninformation/prisonservicemagazine/index.asp?id=3876,18,3,18,0,0>

programs and a model for other organisations. Even more importantly, the inmates develop a bond with another being, the value of which is immeasurable. For many, it is a lesson in trust and compassion that has helped make them better citizens upon their release. "Working with the horses saved my life," said a former Wallkill inmate who is now an alcohol and substance abuse counsellor with the New York Department of Correctional Services. "Around them I could let my guard down. I could be myself. I could also learn from them...about love, trust and caring. And I also realized how much in common we had. We were all in pretty bad shape and we might have been beaten down, but we were definitely not out. Together, we could all make it."

CASE STUDY - San Patrignano, Italy

San Patrignano is a world-renowned centre for the rehabilitation and social reintegration of drug addicts. A number of occupations are offered to residents during their sometimes very lengthy stays during which they are entirely cut off from friends and family. One of the most successful options is horse breeding, which was begun in the early 1980s. The stud, which comprises of 80 horses, concentrates on producing very high quality show jumpers. San Patrignano also has a world-class equestrian arena, which was host to the European Jumping Championships in 2005. San Patrignano was founded on the belief that the relationship between men and horses is an exceptional therapeutic means to help all those with problems in relationships and in relating to others that are typical of drug abuse. Horses allow one to balance and manage one's own emotional reactions, they encourage behavioural constancy and coherence, they require a positive emotional investment and, above all, they require individuals to make an effort to listen and learn a new and unknown language, all of which help participants to escape the self-centredness which characterises most drug addicts.

2.18 If equestrianism is to play any kind of role in addressing these important Government priorities, it is clearly vital to retain and develop further widespread access to riding facilities. The financial difficulties facing equestrian establishments, particularly in urban areas, are documented in the next section of this Strategy. However, there are examples of Government departments and agencies playing a significant part in ensuring that horse-related regeneration projects can be made to serve the community, such as the Aintree Regeneration Project. In addition, it is, of course, vital that the legacy of the equestrian events in the 2012 Olympics, which are currently planned for Greenwich Park, is real, lasting and socially inclusive (even if the physical facilities to stage the events are only temporary). By learning to engage with the Regional Development Agencies, Government departments and other public bodies, and by raising its game in relation to the wider public agendas highlighted earlier, the horse industry will be able to identify community and infrastructure projects which it can support and in turn gain benefit from as they come on stream.

CASE STUDY - Aintree Regeneration Project

The Northwest Regional Development Agency is contributing £4.7m towards a £35m project to redevelop Aintree Racecourse which will include a new unique facility, combining a subsidised riding school for local communities with an international standard show centre that is expected to attract major equestrian competitions and events. Overall, the improved facilities and new equestrian centre are expected to attract an additional 11,200 visitors to the region every year contributing to an

increase of £1.2 million in annual tourist spend, which will provide a significant boost to the tourism industry.

2.19 Finally, another valuable element of the horse industry that is often overlooked is the vital role of volunteers in virtually all aspects. Riding schools, equestrian shows, access groups, breed societies and many other horse-related groups depend fundamentally on volunteers, who in turn gain enormously in terms of personal development and community involvement, from their engagement in the worthwhile activities of these organisations. While the role of voluntary work in charities, such as Riding for Disabled and the International League for the Protection of Horses, is well known, the contribution made by countless organisers and helpers to the success of events at all levels is less widely appreciated. If the horse industry is successful in its efforts to promote riding and other equestrian activities events in order to give them a higher public profile and increase participation, it would be easier to attract volunteers to help and those who were involved would in turn feel more valued and gain from the social and personal benefits on offer.

ACTION 8: Contribution to Government Public Service Agreements

Action : Initiate discussions with relevant Government Departments and agencies on how the horse industry could help contribute to fulfilling their Public Service Agreements and other social policy targets using evidence from case studies, and further research.

Responsibility : BHIC and Defra.

Priority : Medium term.

Aim 3: Boost the economic performance of equestrian businesses

3.1 There are over 18,000 active equestrian businesses in Great Britain, all in some way linked to or dependant on equestrianism¹⁹. The majority are small- or medium-sized enterprises²⁰, many employing fewer than five people. Business activities range from tack shops to feed manufacturers, instructors to photographers, riding holidays to specialist recruitment companies. Improving the economic performance of these enterprises is important not just for the individuals directly involved - as customers, owners or employees - but for the industry as a whole. A healthy and thriving equestrian business sector is vital to the continuing growth and development of equestrian sport, while the economic performance and even the survival of many equestrian businesses depends on a healthy market, buttressed by the other strategic aims.

3.2 A strong equine business sector, performing well in economic terms, will help to keep a constant flow of money coming into the equestrian world. This will benefit not only rural areas but also urban areas, where many of the manufacturing and retail businesses are based. A successful and well-run industry will also be able to lobby more effectively for any changes needed to consolidate and enhance performance in the future.

3.3 The key themes brought out in the initial consultation focused on the business environment (regulation, interaction with local and national government bodies, insurance), internal matters (such as business skills), and joint activities (like promotion, market development and standard-setting). These themes link with one another, and with the other strategic aims (in particular see Aims 1 and 4).

3.4 The main points raised in the consultation are summarised below.

- The majority of respondents felt that regulations – including fiscal and legislative ones, such as the perceived inequity in the rating system between diversifying farmers and existing or new equestrian establishments– were the greatest obstacle to the success of their business. This is similar to the views of small- and medium-sized enterprises nationally²¹.
- Improving business skills, as well as access to and awareness of sources of advice and assistance, was the second most mentioned theme. The development of regional equine strategies could provide networking opportunities and highlight the growing significance of equestrian activity in certain areas²².

¹⁹ Source: British Equestrian Trade Association.

²⁰ Defined as any business with fewer than 250 employees. In the case of equestrian retailers, annual surveys carried out by the British Equestrian Trade Association show that the average number of staff employed is three or fewer.

²¹ See Small Firms: Big Business! A review of SMEs in the UK, Small Business Service, 2002.

²² The Defra Rural Funding Streams Review is looking at this issue and the Rural Business Advice Channel will be a useful source of information for the horse industry when it is made available on the Defra website from March 2006. The intention is to supply better and more accessible advisory services for rural business people, providing advice that is more relevant to them and to the area in which they work and live, and to offer an integrated Defra-family wide information service via a helpline and website.

- Many respondents focused on enhancing the value of equestrian products and services. One strand was to encourage the leisure sector (riders, trainers and riding schools) and business (trade, farmers and education establishments) to work together at local level with local government. Another was to develop new markets, not only export but also domestic, capitalising on the quality image possessed by so many British equestrian products.
- The active inclusion of horses in the development of rural and land use policies also attracted significant comment, including the need to recognise the importance of farm diversification in the development of the industry.
- Equine tourism was identified as an area for development, albeit not as frequently or in as concrete terms as perhaps expected.

(a) Raise standards of business performance

3.5 Successful equestrian businesses depend on both addressing the causes of external pressure *and* ensuring that the enterprises are run as efficiently and economically as possible. Although generalisations can mask individual differences, equestrian businesses tend to be run on lower than average profit margins compared to similar businesses in other sectors. This means that even a slight increase in costs can prove the difference between continued viability and insolvency. Equestrian retailing, for example, comprises many small outlets working off margins that in other retailing sectors would be unviable.

3.6 Many small businesses are run with little awareness of how they are performing relative to others, either within the sector or in other sectors. A benchmarking system would enable businesses to assess their performance in a non-competitive way, and to focus on parts of their operations where there was potential for improvement. Benchmarking is a means to an end - a tool to be used to meet this particular challenge - but not an end in itself. It could be developed to cover all kinds of equestrian businesses (riding schools and centres, farriers, retailers etc.) and include comparisons both within and without the sector. This should help increase business productivity and profitability. It might be based on the existing Department of Trade and Industry Benchmarking Index.

ACTION 9: Business benchmarking

Action : Introduce a benchmarking system, to raise standards and performance across all types of equestrian business.
Responsibility : Industry professionals and trade bodies to lead.
Priority : Short-term.

(b) Encourage co-operation to improve business opportunities

3.7 Equestrian businesses often have little interaction with each other, either businesses of the same type or with related ones. This is due both to concerns about competition and to lack of awareness of the possible relevance of what others are doing. There is however a vital link between participation in riding and the viability of many businesses. As participation increases, so the demand for related goods and services rises. The links between the industry core and the providers of goods and services to that core (see diagram in the introduction) need to be formalised and strengthened. An example is the way that riding schools and retailers can work effectively together to increase the number of customers for both parties by mutual referrals.

3.8 To be successful, a business must manage its affairs efficiently, economically and prudently – in other words “in a professional business-like manner”. Many people, however, move into running an equestrian business by default, not design, driven by an interest in horses rather than in business. Many of these enterprises - whether riding schools, breeders, livery yards or saddleries - may well be run by experts in equine welfare, equestrianism or the craft involved in manufacturing. But this practical expertise is not always matched by sufficient business acumen or management skills to maximise the potential of the business.

3.9 Managers often lack the necessary skills or knowledge to manage their business, including staff, in order to make the most of available resources. Continuing training in modern management practices would assist in business survival and growth, and in the retention and development of staff. Generic business skills should be tailored to the needs of equestrian businesses, and signposts to sources of information such as Business Link (England)²³ and Business Eye (Wales)²⁴ should also be provided.

ACTION 10: Business professionalism

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| <p><u>Action</u> : Encourage targeted continuing professional development in the workplace for equestrian managers, and make access to training easier; establish a business networking system on a local or regional basis to share information, experiences and best practice.</p> <p><u>Responsibility</u> : Industry professional bodies in partnership with Lantra.</p> <p><u>Priority</u> : Short-term.</p> |
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²³ See www.businesslink.gov.uk

²⁴ See www.busesseye.org.uk

(c) Ensure strong links with Development Agencies

3.10 The nine Regional Development Agencies (RDAs) were set up by Government to promote sustainable economic development in England. The Welsh Development Agency fulfils a similar function in Wales. As well as contributing to sustainable development, the purposes are to:

- further economic development and regeneration;
- promote business efficiency, investment and competitiveness;
- promote employment; and
- enhance the development and application of skills relevant to employment.

3.11 The RDAs are sponsored by Department for Trade and Industry but manage a budget, known as the Single Pot, which is contributed to by a number of Government departments, including Defra. The RDAs have the flexibility to use their funding allocation to address the regional priorities laid out in the Regional Economic Strategies (RESs) and in their Corporate Plans. They report to Government through a Tasking Framework. In addition to their mainstream activities, the Agencies have recently been given responsibility for regional tourism and management of Business Links, the business advice network for small- and medium-sized enterprises.

3.12 In order to ensure that evidence of the horse industry's potential contribution to economic development is embedded appropriately in regional strategic priority setting and investment planning, it is vital that the industry establishes a regular dialogue with the RDAs and other relevant agencies. This is covered under Action 4 above.

(d) Ensure a level fiscal and regulatory playing field

3.13 Many people in the industry are convinced that equestrian enterprises are unfairly hindered by inequitable regulatory barriers to growth and an uneven business playing field in comparison with other business sectors in the UK and competing equestrian businesses abroad. Such concerns were repeatedly expressed during the consultation process, and included:

- rate reductions are available to farmers diversifying into equestrian activities but not to existing equestrian businesses;
- commercial riding activities at educational establishments such as Further Education Colleges are considered by the industry to benefit from favourable rating treatment, whereas riding schools are fully rated;
- cycle and motorcycle helmets for adults benefit from a zero rate of Value Added Tax (VAT), as do children's riding hats, while adult riding hats continue to be subject to the full rate of 17.5%; and
- breeders are subject to 17.5% VAT, far more than their competitors in the Republic of Ireland (4.4%) and France (5.5%)²⁵.

²⁵ In 2003, the French Government also reduced their VAT rate for equestrian centres and trainers to 5.5%, as part of a package to develop rural areas, recognising that 'this sector is similar to an agricultural activity and has a real potential for diversification and dynamism for the rural world.'

3.14 These concerns are strongly and sincerely held and, on the face of it, present a compelling case to support the contention that the horse industry is poorly treated. However, while each of the above points is factually correct, the Government believes that they do not necessarily reflect the full picture. For example, the Government considers that there are wider reasons for diversifying farmers to benefit from fiscal breaks, as part of a package available to farmers but not other businesses; and that their entry into the equestrian sector has brought some benefits to riders and horse owners as well as extra competition in some areas. This particular rate reduction scheme, in any case, is currently scheduled to end in August 2006.

3.15 In terms of VAT reliefs, the long-standing formal arrangements with European partners allow the United Kingdom to keep the existing zero rates but make it illegal to extend their scope or introduce any new ones. The Government has, therefore, made it clear that there is no prospect of removing VAT on all riding hats or other safety clothing and equipment. However, the horse industry still feels that a reduced VAT rate for essential safety equipment such as riding hats is needed, and will continue to lobby Government for this reduction.

3.16 The rating of educational establishments is a contentious issue, but the Valuation Office Agency (VOA) stresses that the statutory basis of assessment is the same for both Further and Higher Education Colleges and private sector businesses. The VOA considers that the equine industry's perception that such colleges enjoy an unfair advantage over private sector businesses may be ill-founded. Any differences, if they exist at all (these are difficult to quantify precisely due to the different valuation methods used), may well be marginal on a like for like basis. However, it is acknowledged that certain colleges may be able to claim discretionary rate relief from the relevant Billing Authority based upon charitable status. The Government would be willing to discuss with the industry any factual evidence of unequal treatment they can put forward.

3.17 In addition, the horse industry enjoys some fiscal benefits in its own right. For example:

- Some horse enterprises in England with a rateable value below £10,000 may qualify for rate relief under a the small business rate relief scheme which began in April 2005 ²⁶;
- qualifying stud farms benefit from a £3,500 (max in England) ²⁷ and £3,000 (max in Wales) reduction in rateable value, and can participate in the agricultural flat rate scheme for VAT;
- there is a special VAT registration scheme for racehorse owners, through which they can recover the VAT they pay on the purchase and upkeep of their horses;
- rate reliefs are also available for charities, and on a discretionary basis to other non-profit making organisations and to businesses with a rateable value below £14,000 in a rural village with a population below 3,000 ²⁸;
- under the Common Agricultural Policy, the Single Payment Scheme in England has been extended to include land grazed by horses ²⁹; and

²⁶ See www.mybusinessrates.gov.uk/rates/other-reliefs.

²⁷ Non-Domestic Rating (Stud Farms) (England) Order 2004.

²⁸ See www.mybusinessrates.gov.uk/rates/other-reliefs.

- there are some VAT schemes which the horse industry could also benefit from, such as the VAT Margin Scheme for the sale of second hand horses and ponies or VAT Auctioneers Schemes³⁰.

3.18 Concerns also exist about the treatment of horse enterprises in the land use planning system. Guidance which positively encourages planning authorities to support equine-related activities was introduced in August 2004 with the publication of Planning Policy Statement 7 (PPS7), *Sustainable Development in Rural Areas*³¹. It also includes advice on occupational dwellings for rural enterprises, which should help alleviate difficulties in obtaining planning permission for on-site staff accommodation. There, however, remains some evidence of inconsistent approaches taken by different planning authorities (see Aim 6). The improved industry communications arrangements envisaged in Aim 1 (Action 3) may help to provide equestrian businesses with access to clear and useful advice on land use planning, while local and regional horse networks (Action 5) would be able to lobby local planning authorities to achieve greater consistency in this field and to give greater weight to the PPS7 advice and guidance.

3.19 Defra and the British Horse Industry Confederation (BHIC) have repeatedly discussed the taxation of horse enterprises. Defra has provided the BHIC with a checklist of the issues which the industry needs to address in order to make a case for change. Progress is being made gradually on many of these issues, with a view to ensuring that the industry operates on a genuinely level playing field with other businesses in England and Wales. This means that there are unlikely to be additional, new fiscal breaks available to it in the foreseeable future but it will be important to ensure that businesses are well informed about any arrangements from which they can benefit. In order to achieve this most effectively, equestrian industry bodies need to develop a more cohesive approach to gathering evidence, and to lobbying and engaging in dialogue with Government at national and regional level. This process could be effectively carried forward by the industry's Horse and Pony Taxation Committee.³²

²⁹ The land must be kept in Good Environmental and Agricultural Condition, and included in a holding of at least 0.3 hectares. No claim may be made where the land is mainly used for recreational purposes such as racecourses, gallops or cross country courses. In Wales the calculation for the Single Farm Payment will be based on Common Agricultural Policy (CAP) direct payment claims that farmers made during 2000 to 2002. Those who were not in a position to claim agricultural subsidies in those years will not be eligible. So in Wales, no change as far as new CAP payment regime is concerned for farmers or landowners running solely horse-based businesses.

³⁰ See www.hmrc.gov.uk

³¹ It states that 'Local planning authorities should set out in their development documents their policies for supporting equine enterprises, whilst maintaining environmental quality and countryside character. These policies should provide for a range of suitably located recreational and leisure facilities and, where appropriate, for the needs of training and breeding businesses. They should also facilitate the re-use of farm buildings for small-scale horse enterprises [that is, enterprises involving up to ten horses] that provide a useful form of farm diversification.'

³² The Horse and Pony Taxation committee is a specialist group, consisting of taxation specialists and experts, including representatives from equine organisations who meet to discuss and pursue taxation issues for the horse industry.

ACTION 11: Fiscal and regulatory constraints

Action : Horse Industry to identify real and significant fiscal and regulatory constraints on equestrian businesses, and make a cogent case for change where appropriate.

Responsibility : Horse and Pony Taxation Committee, in conjunction with the BHIC. Industry and Government should meet regularly to discuss action and progress.

Priority : Medium-term.

(e) Reach an industry view on the status of the horse

3.20 Under domestic legislation only horses that are used to farm agricultural land or are farmed for meat or hides can be said to be agricultural animals³³. By contrast European Union legislation treats the horse as a food-producing animal³⁴, reflecting the fact that horsemeat is eaten in some Member States.

3.21 Some consultation respondents considered that domestic legislation should class the horse as an 'agricultural animal', paralleling what they saw as its treatment in some other Member States as, in the main, an 'agricultural' or 'production' animal. They believe that this classification would automatically lead to the horse industry being granted the same benefits under the fiscal and planning systems as farming³⁵. In practice this is not so easy. Any change in the treatment of horse enterprises would require a specific and convincing case to be made (see Action 12) and some requirements of an agricultural classification could damage competitiveness.

3.22 Others within the industry consider that the horse should be defined as a companion animal, whilst a third group believe that there is a case for the horse to have its own status within agriculture as a production animal for sport, leisure and potentially food. Before the industry lobbies for any change in the status of the horse, it must be clear whether this would make any substantive difference, and if so what the repercussions for all parts of the industry would be - what could be helpful for one part could work against another. There may be an argument for a case-by-case approach.

³³ This follows from the Agriculture Act 1947, section 109. The interpretations in other legislation, including the Town and Country Planning Act 1990 and the Agricultural Tenancies Act 1995, are based on the 1947 Act.

³⁴ The root legislation is Directive 64/433/EEC, which regulates trade within the Community in fresh meat for human consumption. One consequence is that horse feed is zero rated for Value Added Tax.

³⁵ Exemption from business rates, zero rating of agricultural animals for Value Added Tax, and permitted development rights for agricultural buildings.

ACTION 12: The status of the Horse

Action : Set up a working group representative of all parts of the industry to determine whether the status of the horse is a significant issue, and if so to establish an industry-wide position and make a convincing case for change, with consideration being given to the situation in other Member States.

Responsibility : British Equestrian Trade Association (BETA)/ BHIC to lead. Defra would support the working group on request by providing factual advice and guidance.

Priority : Medium-term.

(f) Address problems associated with insurance & health and safety risk management

3.23 Riding is a risky activity. This very risk contributes to the value of the learning experience, and to the role riding plays in the social development of young people, who may apply the lessons they learn to other parts of everyday life. In recent years significant increases in insurance premiums have, however, contributed to severe financial difficulties for owners of riding and livery establishments. In some instances, these have apparently precipitated closure. Similarly, equestrian retailers are increasingly faced with litigation following equipment failure that is not attributable to them, and it is becoming more difficult for feed manufacturers to obtain product liability insurance. These problems are in part a reflection of an increasingly litigious society, fuelled by the proliferation of “no win, no fee” cases. Added to this is the impact of the *Mirvahedy* case on owners’ liability which found that, in some circumstances, horse owners are liable for damage caused by their horses even where they have not been negligent³⁶.

3.24 In an increasingly risk averse and litigious society, the risks associated with riding are becoming a serious liability for the industry rather than one of its positive features. The industry needs to encourage the Government to recognise the risks involved in active participation sports and other outdoor activities and to ensure that properly managed risk is not a thing to be avoided at all costs for fear of litigation. Other countries, such as the USA, have legislation which formally acknowledges this kind of risk, and the industry believes that the Government should consider doing something similar.

CASE STUDY - Legislation in the United States

Legislation has been passed in the State of Kentucky that recognises the inherent risk surrounding anything to do with farm animals, including horses. Under it, keepers have no specific duty to reduce that risk. The legislation is no defence against negligence, and there is a duty to warn participants of the inherent risk. Such legislation has prevented spurious claims, for example against a riding school following an accident where the proprietor has not been negligent and has made known to the participant

³⁶ *Mirvahedy v. Henley* (2003)

the risks associated with riding horses. Other States have passed similar legislation.

3.25 There are some signs that the Government is moving towards this recognition. For example, in May 2005, the Prime Minister delivered a speech in support of “a Commonsense Culture instead of a Compensation Culture”³⁷. In that speech, he promised that his Government would introduce a Compensation Bill³⁸ which would limit the work of the “claims farmers” who feed the litigation process, and “clarify the existing common law on negligence to make clear that there is no liability in negligence for untoward incidents that could not be avoided by taking reasonable care or exercising reasonable skill”. In addition, Government departments responsible for activities perceived to involve risk or liability, such as volunteering and sport, have been discussing with the insurance industry how such risks might more effectively be handled. The horse industry looks forward to seeing how the Bill progresses, and the outcomes of these discussions.

3.26 Addressing the root cause of rising insurance premiums through formal recognition and acceptance of the risks associated with riding is clearly the best way of tackling the issue long term. However, the horse industry is clear that it needs to act now if more and more riding establishments, who, as noted elsewhere, frequently operate on narrower margins of profitability than other enterprises, are not to be driven out of business. It must, of course, be for insurers to determine the level of risk inherent in any activity and set premiums accordingly, but following encouragement by Defra, the horse and insurance industries have set up a joint working group to help ensure that increases are fully justified by the level of risk, identify how risks can be reduced, and find a way forward that makes commercial sense to both sides. This group has concluded that better record keeping holds the key to keeping the lid on insurance premiums for equine establishments. The industry does not believe that this necessarily means more paperwork, except for those establishments which are currently lax in this regard. The group is, therefore, working to produce and disseminate rider, horse and instructor record forms which will capture the essential data and provide insurers with the evidence they need to resist claims which have no merit.

3.27 As well as businesses being affected by rising premiums as a result of past litigation, the outcome of the Mirvahedy case presents both equine businesses and private horse owners with a potentially serious problem in terms of owners’ liability for the future. The Animals Act 1971 places strict liability on the keeper of animals that cause harm where the following points are satisfied: “(a) the damage is of a kind which, unless restrained, the animal was likely to cause; and (b) the likelihood of the damage was due to characteristics which are not normally found in animals of the same species or are not normally found except at particular times or in particular circumstances; and (c) those characteristics were known to the keeper.” In the past, this was interpreted as allowing owners to avoid liability for damage caused by their horses if they could show that they had not acted negligently, e.g. if field fences and gates were reasonably high and secure. The Law Lords, however, held that owners were liable for the actions of horses behaving in a way that was normal for horses in

³⁷ Speech at University College, London on Thursday 26 May 2005.

³⁸ The Compensation Bill was published on 3 November, 2005 and is currently before Parliament. For more information see www.parliament.uk

a state of panic, even though they had not been negligent. The Country Land and Business Association (CLA) has initiated a campaign to have the Animals Act amended to address this potentially open-ended liability issue, and the Government is looking into what might be done to achieve this.

ACTION 13: Insurance Issues

Action : Pursue all three strands of the insurance issue, i.e:

- a. Continue to discuss with Government ways of ensuring that the risks associated with riding are recognised and accepted;
- b. Make rider, horse and instructor record forms freely available, and devise an educational programme to help riding establishment proprietors improve the quality of their records; and
- c. Explore with Government ways in which the adverse implications of the Mirvahedy judgement can be ameliorated for horse owners.

Responsibility :

- a. The BHIC
- b. The British Horse Society (BHS) and the Association of British Riding Schools (ABRS) (working closely with the BHIC and the insurance industry).
- c. The BHIC

Priority : Short-term, and beyond.

3.28 As already stated, there are inherent risks associated with riding and being around horses. Many of the accidents that do occur are not associated with these inherent risks but with risks that have not been identified or managed. An understanding and improved management of risks that can be controlled will lead to reduced accidents, enhancing the horse industry's image as a safe and responsible sport, boosting economic performance and help to address the problems associated with insurance. The Association of British Insurers³⁹ has published a document for the Voluntary and Community Sector which looks at risk management and insurance advice, much of which relates to the horse industry.

3.29 Many businesses are either under compliant - or indeed not compliant at all - with health, safety and environmental legislation. They need to made aware not only of their obligations under the legislation, but the benefits that compliance will bring to them and their businesses in potential cost savings. The Health and Safety Executive (HSE) has been proactive in the agricultural sector in order to raise the levels of awareness in the industry by running UK-wide road shows and developing free interactive software to help farmers carry out a comprehensive health and safety assessment of their farms. There is some common ground between agriculture and the horse industry, and the HSE could be encouraged to provide similar resource to the horse industry.

³⁹ www.abi.org.uk Association of British Insurers – Living with Risk

(g) Enhance the value of equestrian goods and services

3.30 Adequate data on the value and growth of the horse industry and its component parts is essential for proper commercial and policy decisions. The official statistics are unhelpful, as the standard classification generally does not identify equestrian goods and services specifically. For example, saddles are included in the same code as handbags and luggage, so the only way to quantify the (growing) value of saddlery exports is to obtain sensitive data direct from individual companies,

ACTION 14: Statistical classifications

Action : Facilitate the gathering of statistics that will better allow the value of the industry to be assessed, through a revision and redefinition of the Standard Industrial Classification and Standard Occupational Codes at a five digit level.

Responsibility : BHIC, BETA, Lantra and Office of National Statistics to discuss.

Priority : Medium-term.

3.31 The growth of riding as a leisure activity has run alongside the expansion of the equestrian industry that supports it. The reputation of British manufactured equestrian products is recognised around the world. For example, many export markets view us as the natural home to finely crafted saddlery, with a tradition of craftsmanship that still thrives. Yet British manufacturers and designers are also at the forefront of innovation in a wide range of equestrian-related products, including the introduction of new methods in the manufacturing of traditional products. Innovation, style, design, safety, and value for money are all characteristics that buyers of these products expect to receive. This reputation needs to be more fully promoted and exploited in order to develop existing and emerging markets.

ACTION 15: Promotional material

Action : Promote the UK as a source of quality goods and services through preparation of a promotional paper and digital (DVD) guide to British excellence in the equestrian industry. (See Actions 16 and 18).

Responsibility : BETA to lead for industry, with UK Trade and Investment.

Priority : Short-term.

CASE STUDY - Overseas trade promotions

Overseas equestrian consumer fairs or competitions offer one of the best opportunities to market and promote British expertise and products. The British Equestrian Trade Association has taken groups of exhibitors to the World Equestrian Games, Equitana (the world's largest equestrian consumer fair in both Germany and Australia), the Rolex three-day event in Kentucky, USA, as well as to trade fairs in Germany and the Middle East. Information about British companies has reached a

targeted world audience of over 500,000 riders and equestrian-minded individuals, highlighting the opportunities available to them to ride or visit equestrian events, buy British horses or benefit from the quality offered by British equestrian equipment.

ACTION 16: Trade fairs and promotions

Action : Encourage greater participation in overseas and domestic equestrian trade fairs and travel promotions, in order to highlight British expertise, products and equestrian tourism opportunities.

Responsibility : BETA to lead for industry; Visit Britain offices and UK Trade and Investment.

Priority : Medium-term.

CASE STUDY - Equitech saddlery project

Equitech is a three-year project, set up in 2002, specifically tailored to look at technology opportunities within the equestrian manufacturing industry. The project was initiated by the Centre of Engineering Excellence in conjunction with local companies, industry sector bodies such as the Walsall Equestrian Society and the British Equestrian Trade Association and Advantage West Midlands. Through Equitech, saddlery-manufacturing companies had access to support that helps them to explore and diversify into new areas of development, aiding business growth and keeping abreast of technological advances. As a result of the project companies have introduced lean manufacturing practices, and looked at the benefits of reverse engineering. They have also considered how motion analysis research can be used in the design of saddles, and how technology that measures the dynamic pressure distribution between a saddle and the horse's back during riding can be utilised in assessing saddle fit.

3.32 The horse industry needs to be able to utilise new technology and research and development opportunities more effectively so as to boost its international competitiveness. Improved access to information and communication technology and supply could be obtained through the development of closer links between the industry and the business support, advice and information network provided by Business Link in England⁴⁰ and Business Eye in Wales⁴¹.

⁴⁰ See www.businesslink.gov.uk. Business Link can also provide information on tourism, waste, planning and diversification.

⁴¹ See www.busesseye.org.uk. Business Eye acts as a signpost and can help put business enterprises in touch with support from the public, private and voluntary sectors.

ACTION 17: New technologies and research and development

Action : Encourage use of new and developing technologies and research and development in business, to improve productivity and efficiency.

Responsibility : BETA with other related industry bodies.

Priority : Long-term.

(h) Increase equestrian tourism

3.33 The initial consultation attracted several references to the need to enhance the value of equine tourism, although few concrete suggestions for action. This may be partly due to confusion over what exactly is meant by “equestrian tourism”. For some it means inbound visitors attending race meetings, watching major equestrian events or going on packaged riding holidays. The opportunity to see native breeds in their natural surroundings adds to the tourism offering. For others it means the activity regularly undertaken by many riders, travelling to areas away from home to ride their own horses on bridleways or long distance routes. It can also mean going away to a trekking centre for a hack, or a riding centre for a course of training or weekend break. All of these activities are important aspects of the tourism product and can be an important tool in attracting first time riders to participate and enhance riding as a family activity. Aim 5, increasing access to off-road riding, is particularly relevant to the middle option.

3.34 Much work is already being done in relation to farm-based tourism. A similar structure needs to be developed for equestrian tourism. This should be carried out in partnership with other rural-based tourism. The Rural Enterprise Scheme (RES),⁴² part of the England Rural Development Programme (ERDP), supports a wide range of tourist activities, including activity-based holiday facilities such as trekking centres, and does not require the applicant to be a farmer. The emphasis is on activities that bring tourists into the area, rather than, for example, riding schools which cater mainly for leisure activities for the local population. The RES is coming to an end in late 2006. Work on designing the ERDP successor programme is currently in progress and the horse industry needs to ensure that it is fully engaged with the successor programme from the outset. (See Aim 8 for more information on tourism projects involving native ponies.)

CASE STUDY - A strategy for Equestrian Tourism in the South East

In 2003 Tourism South East and Rural Ways commissioned a project to “scope the equestrian tourism sector” through relevant research, and to draft a plan setting out a three year programme for the development of the region’s sustainable equestrian tourism. The overall aim was to enhance the economic contribution of the sector, by developing its tourism potential whilst ensuring the sustainability of any future equestrian tourism enterprises. The strategy was published in late 2004. It identified key priorities, and proposed objectives for the action plan. The key priorities include raising the profile of the South East as a focus for equestrian tourism, creating new product and marketing links and packages between equestrian and tourism products, and integrating initiatives between the two sectors. The objectives include marshalling information on equestrian tourism for visitors, developing specific riding holidays, racing packages and events, and marketing these to the primary target markets, and supporting further development through market research and profile raising of equestrian tourism. See www.industry.visitsoutheastengland.com

⁴² www.defra.gov.uk/erdp/default.htm

CASE STUDY - Horse tourism in Wales

Forestry Commission Wales and the BHS signed a concordat in July 2004 to work together, including to promote the growth in horse tourism in Wales. The concordat aims to promote:

- open access wherever possible for horse riding in woodland;
- opportunities for horse riding and pony trekking businesses
- a new code of practice for horse riders using National Assembly for Wales woodlands, to encourage a safe and responsible approach to riding;
- the establishment of local horse riding associations to develop and manage the trails and associated facilities;
- pilot horse riding associations in areas where there is a need to regulate riding in National Assembly for Wales woodlands; and
- annual workshops to promote understanding and raise awareness of the impact of recreation on the environment.

CASE STUDY - Dyfnant & Vyrnwy Forest Trails

The idea of developing the two neighbouring forests between Welshpool and Dolgellau to promote horse tourism came about as a result of a conversation between a riding enthusiast and the Forestry Commission Wales area manager. This led to the creation of a 200-strong (and growing) society of enthusiastic equestrians, the Dyfnant and Vyrnwy Horse Riders & Carriage Drivers Association, who liaised with the Commission about the creation of safe off-road riding facilities in the remote uplands of Mid-Wales.

Following a successful bid for Objective 2 European Funding, a suite of forest tourism projects have been developed to attract more visitors to Powys. The neighbouring forests are set to become an important national centre for equestrian recreation in the same way as the nearby Coed y Brenin forest has developed into a nationally renowned mecca for mountain bikers.

Considerable work has already taken place in the Dyfnant Forest to provide safe off-road facilities recreational and competitive riding and carriage driving. Disciplines benefiting from the new facilities include endurance riding and the new equestrian sport of BHS Trec, with the forest being used for fun weekends and taster sessions for novices. Facilities include a roll-in roll-out car park for horseboxes, a corral where horses can be turned out safely whilst riders prepare vehicles for the journey home, and two hard track trails and two soft track trails ranging from 3 miles to 18 miles in length. A further 18 miles of soft trails is being created.

The Severn Trent Water Authority has developed several tracks in neighbouring Vyrnwy Forest, and work continues to look at the best way to open some impassable routes to link the two forests.

ACTION 18: Equestrian Tourism

Action : Encourage a cohesive approach to promoting equestrian tourism through local authorities, regional tourism councils and national bodies; publish a national register of riding holidays and equestrian tourism opportunities on the internet; and establish a national descriptive grading system for equestrian tourism.

Responsibility : Associations representative of professionals in the industry, including BETA, British Horseracing Board, BHS and the ABRS, working with holiday providers and regional and national tourism bodies in England and Wales.

Priority : Medium-term.

Aim 4: Raise equestrian skills, training and standards

4.1 The initial consultation showed that all parts of the industry wish to raise standards and skill levels, and improve training opportunities. The key themes which emerged were attracting and retaining staff, providing an environment in which people wish to build a career, identifying skill levels and training needs, and improving opportunities for work-based learning, including funding.

4.2 The need for greater cooperation between all sectors of the horse industry to address the issues and identify workable solutions was also highly apparent. Collaborative projects with industry-wide promotion will be required in order to make the necessary impact. It was also evident that awareness of the work of Lantra, the Sector Skills Council for the environmental and land-based sector, was patchy. Lantra has recently undergone a change in strategic direction and is now focused on engaging with employers to ensure skills and qualifications are as required by industry. It is vital that the horse industry utilises this and engages with Lantra to ensure its requirements are met.

4.3 Improving the skills, training and standards of those working with and riding horses will help improve the industry's image (including horse health and welfare) and economic performance. Implementing the Actions under Aims 1, 2 and 3 to bring the horse industry together, increase participation and boost business will in turn have a positive impact on the industry's ability to attract and retain staff.

(a) Attract and retain staff

4.4 The horse industry is facing major challenges in attracting and retaining sufficient numbers of staff. Information on the nature and range of career opportunities is not always made readily available to young people. A career within the horse industry does not fit easily with the modern lifestyle currently led by many young people. A clear career structure, allied to training and progression opportunities and improved working conditions, is needed to encourage staff retention.

4.5 Qualifications are paramount in a modern career, although within many facets of the horse industry there is no substitute for practical experience. Some areas of the horse industry, although not all, do have a defined career structure. The marketing of a career within the industry is weak. Careers advisors, parents, and other bodies such as Connexions need to understand the opportunities available and the benefits of a career within the industry.

ACTION 19: Recruitment and retention strategy

Action : Devise and implement a strategy for attracting and retaining staff in all sectors of the industry, including:

- a marketing campaign to promote a career with horses;
- closer working with all careers advisors, including Connexions;
- a clearer career structure; and
- a central jobs register to facilitate both initial access and retention.

Responsibility : British Horse Industry Confederation (BHIC), central industry communications function (Action 3) and Lantra.

Priority : Short-term start, medium-term implementation.

4.6 The fact that equestrian training is only very occasionally included in sports teaching in schools reduces access both to leisure riding and to potential equestrian careers. The recent introduction of apprenticeships for those over 14, involving up to two days per week in the workplace, together with proposed changes to the 14-19 curriculum in England and the development of an environmental and land-based line of learning, presents opportunities for the horse industry. A number of schools are already utilising riding schools and taking pupils for vocational training on a regular basis. Funding is a major issue and is hindering the expansion of these schemes. The Racing Education Programme (see Aim 2) could provide a model for other industry sectors.

ACTION 20: Vocational training

Action : Introduce a coordinated industry strategy to work with schools so as to provide work experience opportunities and vocational training across the horse industry.

Responsibility : Industry organisations in partnership with Lantra.

Priority : Medium-term.

(b) Provide an environment in which people wish to build a career

4.7 The industry requires a diverse range of skills, from business owners to vets, farriers and grooms. There is a belief that the owners of equestrian businesses need to be trained in staff management skills, and in health and safety, in addition to training in business skills and access to business advice (which are covered under Aim 3). There is a discrepancy in the availability of training and the funding for this with regard to diversifying farmers and others wishing to enter the industry or already working there. The welfare aspects of horse management should also feature in all training programmes.

ACTION 21: Staff management training

Action : Encourage equestrian business proprietors to further their own skills in human resource management, health and safety and physical resource management.

Responsibility : Industry organisations supported by Lantra.

Priority : Medium-term.

4.8 In racing, all stable staff are required to be registered with the Jockey Club, and are automatically members of the Stable Lads Association. The Association, which is currently undergoing modernisation, represents the interests of the workforce in discussions throughout racing, acts on behalf of all staff in national negotiations on terms and conditions of employment, and provides an advice and representation service in individual disputes. However, this is the exception. The interests of people working in the horse industry are not generally represented by a union or staff association. This can make the industry a less attractive place to work, and denies employers the opportunity to talk to a body representing employees' interests. Moreover, in the Government's view workplaces where employees are informed and involved operate more effectively and successfully.

(c) Identify skill levels and training needs

4.9 The key to success for any business is the skill base of its staff. Little accurate data is available on the numbers and skill levels of those working in the industry or on its future skills requirements, and without such data it is difficult to plan appropriate, effective solutions. Initial work conducted by Lantra and the industry as part of the Sector Skills Agreement has begun to address this, although further work is still needed to complete this analysis of the needs of the workforce. Addressing ongoing training needs is vital if the other strategic aims are to be achieved.

4.10 From January to March 2006, Lantra will be piloting a Skills Passport for grooms. This is an opportunity for grooms to keep a record of their competencies and measure them against the National Occupational Standards. It is not a qualification, but a recognition of what people can do. Existing qualifications can be mapped against the Passport. There is still much research within the industry to be undertaken to gauge the project's validity and many questions to be answered, especially with regard to quality assurance and credibility. Lantra will be undertaking this research during the end of 2005 and the beginning of 2006.

ACTION 22: Skill levels and training needs

Action : Undertake research to establish skill levels and training needs with the aim of defining current and future skills requirements.

Responsibility : Industry organisations in partnership with Lantra.

Priority : Short-term.

(d) Improve opportunities for work- and college-based learning

4.11 Nowadays more young people choose to pursue college courses to gain skills and knowledge than to train on-the-job. Many riding schools and private training providers thus find themselves in competition with colleges and Further Education establishments to provide training.

4.12 Equal value should be placed on both academic and vocational forms of learning. Many other industries manage to combine training at college and in the workplace, so as to get the best of both worlds for all involved. In some quarters, strong concerns have been voiced about the suitability of the curriculum content and training regimes of academic and National Vocational Qualification courses with regard to employment. There is anecdotal evidence of a demand for the emphasis of training to be practical and 'on-the-job'. Greater alliances between colleges and equestrian establishments would help to provide more relevant work experience, and to ensure that course content is fully relevant for future employability.

CASE STUDY - Children's riding and qualifications

A pilot scheme started by the British Horse Society (BHS) at Lee Valley Riding School in North London offers children the chance to ride and gain an NVQ Level 1 or BHS Stage 1, opening up the possibility of a job in the industry after they have left school. The scheme has also shown how interacting with horses can be of great benefit to these children with learning difficulties, as it has been a huge motivator to the children not just to learn to ride but to also progress with their academic and social education. The BHS Director of Standards who conceived the course says, "It introduces people to working with horses and gives them a career or hobby that can be for life. But this is just the pilot stage. To succeed it must be open to everyone".

CASE STUDY - Racing School studentships

Under the Rules of Racing, if you are aged between 16 and 18 years and want to work in a trainer's yard you are required to undergo training either at the British Racing School or at the Northern Racing College. Students will typically spend nine weeks at one of the schools. In this time they should achieve part of the NVQ2 qualification. Students are placed in a guaranteed job at the end of the course. The remainder of the qualification is then completed and assessed at their new job by a team of roving assessors. They visit soon after the student starts, to make sure they have settled in, and then every two months until they have completed the qualification. This usually takes just under a year.

4.13 The training available to those in the horse industry should not only address entry-level needs but also provide continuing professional development (see Action 10). The benefits of continuing training for employers and employees should be stressed and encouraged. Training is available for leisure riders and horse owners to improve their riding, welfare and horse-care skills and, again, this needs to be encouraged.

ACTION 23: Practical training good practice

Action : Industry-based training providers and colleges to work together for better communication to disseminate and share good practice for the practical training elements of education programmes through optimising the use of human and physical resources.

Responsibility : College/industry liaison and advisory groups.

Priority : Short-term.

4.14 The training infrastructure needs to be accessible and affordable, with bureaucracy kept to a minimum. Many employers already play their part in investing and assisting in training and development but have difficulty in accessing funding. The horse industry consists of many micro organisations which makes the accessing of funding difficult.

ACTION 24: Funding policy and age restrictions

Action : Work with the Learning and Skills Council regarding the current policy of funding mainly large providers, the range of qualifications accepted, and barriers created by current age restrictions.

Responsibility : Industry organisations in partnership with Lantra.

Priority : Medium-term.

4.15 The training and career pathways available should be better coordinated across the industry to enable employees to move more readily between the different horse disciplines and parts of the industry. The current training systems are fragmented and diverse and sometimes lead to confusion.

ACTION 25: Training and skills coordination

Action : Industry organisations to work together to achieve more co-ordination of training and better understanding of respective skills and qualifications.

Responsibility : Industry organisations.

Priority : Medium-term.

Aim 5: Increase access to off-road riding and carriage driving

5.1 Consultation in preparation for this Strategy confirmed a widespread and strongly held desire to improve access to off-road riding and driving, and particularly the need to provide more safe riding and driving routes for existing equestrians, potential riders and carriage drivers, and equestrian tourists. Many respondents felt that the Government and local authorities had not given the access needs of horse-owners sufficient consideration, and specifically that they had failed to:

- Appreciate the importance of safe, sufficient access for riding;
- Provide adequate funding and other resources to deliver it;
- Work effectively towards a proper network of equestrian rights of way.

5.2 Many also believed that, despite the improvements which may occur under existing initiatives, opportunities for and the quality of riding outside the confines of an indoor arena is likely to continue to deteriorate in most areas, and that proactive and united action is urgently needed. The general view is that current legislation and practice on the ground are not working to achieve an adequate level of access to suitable off-road routes, and are not delivering best value for the, too limited, resources available. Consideration must be given to the environmental impact of increased access and other equestrian recreational activities, to ensure that their planning and management is promoted in a way that respects and safeguards the environment. (see Aim 6)

5.3 The Government and the British Horse Industry Confederation (BHIC) agree that the strategic objectives should be:

- ensuring a joined up and well-maintained network of equestrian public rights of way;
- increasing provision of other off-road equestrian routes and of areas with equestrian open access;
- continuing safety education for motorists, riders and carriage drivers; and
- ensuring urban and suburban riding and carriage driving are promoted and improved as well as rural riding and carriage driving.

5.4 These objectives can be pursued through Rights of Way Improvement Plans (RoWIPs) and the work of Local Access Forums (see below), which give the opportunity for equestrian interests to highlight their needs and requirements for resources alongside those of other road and rights of way users.

(a) Ensure a joined up and well-maintained network of public rights of way

5.5 Consultation revealed a wide range of concerns about the current arrangements for identifying, securing, delivering and protecting statutory access, including:

- rights of way have been incorrectly classified or not recognised at all on the definitive map;
- rights of way have been severed by new roads;
- equestrians currently have to devote considerable resources to efforts to preserve such facilities that they already have;
- the right of access to beaches for horses needs to be investigated and promoted, in line with the move to extend walkers' Open Access to the coastline;
- the Highways Agency has slowed down implementation of actions identified in its Vulnerable User Crossings Improvement Programme;
- roads are increasingly dangerous to use due to;
 - The speed and volume of traffic;
 - Bad driver behaviour;
 - Obstruction of verges;
 - Failure to provide suitable crossings or horse margins; and
 - Slippery surfaces (particularly stone mastic asphalt).
- local authorities are reluctant to use their powers to create rights of way, due to uncertainty about the costs of compensation payable;
- procedures are time consuming (up to fifteen years) and expensive; and
- the right of cyclists to ride on bridleways, given by the Countryside Act 1968, has not been reciprocated, with horses being denied access to cycle tracks, or inconvenienced where shared access is allowed through the use of inappropriate surface materials.

5.6 Action is already underway to address some of these concerns, through:

- The Countryside Agency's Discovering Lost Ways project, which is tackling the issue of lost rights and should help resolve problems of severed routes and fragmentation. The research is planned to be complete in about ten years, and if the claims then put forward are successful, this should result in many more bridleways throughout England;
- The Highways Agency is producing guidance on making alternative provision when new roads affect existing equestrian routes;
- local highway authorities, which are responsible for rights of way, have to prepare RoWIPs by 2007, involving their Local Access Forums;
- The British Horse Society and the County Surveyors Society are preparing a joint code of practice on road surfacing; and
- The Department for Transport has included measures for horse riders in the national road safety strategy.

These actions provide a good framework within which a significant improvement in equestrian access can be made to ensure that provision for riders and drivers can match the access benefits gained by walkers and cyclists over the past few years. This will, however, require significant input from the horse industry as well as from public authorities.

Leadership

5.7 It is generally agreed that a coordinated structure of access organisations in the horse industry is needed to take the lead in pursuing increased access, defending existing access, and to advise everybody with an interest in equestrian public rights of way. Numerous volunteers spend hundreds of hours trying to defend, improve and expand routes for riding and driving. There is a great deal of passion and enthusiasm that can be harnessed, and the identification of an organised structure would help to give leadership and direction for this. The Ramblers' Association has achieved much for walkers over the years and is widely felt to provide a good example of the sort of structure that would benefit the horse industry. Moreover, Sustrans⁴³ has achieved great progress on behalf of cyclists in a very short time, and this organisation might also be a potentially good role model for achieving the goal of improving access for riders and drivers. The industry's lead access bodies should not only learn from other organisations, but work closely with them to improve the rights of way network as a whole and develop a mutually beneficial relationship.

CASE STUDY - Sustrans: The Sustainable Transport Charity

Sustrans works on practical projects to encourage people to walk, cycle and use public transport in order to reduce motor traffic and its adverse effects. Its projects include:

- The National Cycle Network: a 10,000 mile series of signed cycling and walking routes linking communities to schools, stations and city centres, as well as to countryside.
- Active Travel: promoting cycling and walking as effective ways to improve health, addressing issues such as heart disease and obesity, and tackling accessibility and social exclusion issues.
- Liveable Neighbourhoods: putting pedestrians on a more equal footing with cars by transforming streets into social spaces where people can enjoy their environment.
- Safe Routes to Schools: combining practical and educational measures to encourage children to walk or cycle to school, promoting their health and fitness.
- Research and Monitoring: specialist work intended to win support for Sustrans by demonstrating the benefits of cycling and walking.
- Volunteer Programme: a Volunteer Ranger programme, enabling volunteers to make a difference to their communities, looking after local cycling and walking routes and enjoying the outdoors.

5.8 Many see the British Horse Society (BHS) as the obvious leading organisation due to its professional staff, its regional and county network of volunteers, its position as statutory consultee, and its well-developed contacts with Government and a wide variety of national bodies. However, not everyone agrees, and the BHS itself acknowledges that it would need to work closely with like-minded organisations, many of which have a great deal of experience and expertise, if it were to undertake this leading role and justify their support and respect. Although the BHS is increasing the resources devoted to Access and Rights of Way - and has recently appointed a dedicated, full-time Director of Access, Safety and Welfare - any significant additional

⁴³ www.sustrans.org.uk

expenditure on the part of organisations working in this field would need a fresh injection of revenue funding and renewed commitment from all parties to work together towards a common goal. It is not clear where this extra funding could come from under present structures, but the first job of a coordinated structure of access bodies must be to secure sufficient funding to take the work forward.

ACTION 26: Achieve greater cooperation amongst existing access organisations.

Action : Develop an agreed structure within the industry in order to coordinate access interests, achieve greater cooperation amongst access bodies and ensure that knowledge and skills are marshalled to best effect.
Responsibility : The existing industry access bodies working in this field, including the National Federation of Bridleway Associations, the Byways and Bridleways Trust as well as the BHS.
Priority : Short-term.

ACTION 27: Engage with lead bodies in other fields

Action : The horse industry must engage with the lead bodies in other fields, such as the Ramblers Association and Sustrans, to learn from their successes, and identify common causes to improve access for riders and drivers.
Responsibility : Identified structure of access bodies.
Priority : Short-term.

Local Action

5.9 The national level, coordinated campaigning work of these lead bodies will need to support and supplement efforts at regional and local level through relevant horse networks (see Action 5), who would be able to oversee work on access in their areas. It would also be able to help the horse networks and others to contribute effectively to the range of new mechanisms which have been introduced over the past few years to try to address wider concerns about public access, such as Rights of Way Improvement Plans (RoWIPs), Local Access Forums and the Discovering Lost Ways project.

5.10 There are currently 80 Local Access Forums (LAFs) in England, which are established under section 94 of the Countryside and Rights of Way Act 2000, and 29 in Wales. Forum members represent user and landowner interests, and provide independent advice to their appointing authorities and others on:-

" the improvement of public access to land in their area for the purposes of open-air recreation and the enjoyment of the area".

A recent study by the University of Gloucestershire identified that LAFs varied quite widely in terms of their activity and focus. Defra and the Countryside Agency are currently considering how to better support and develop the work of these forums so that they can all operate as effectively as the best.

5.11 Local highways authorities outside Inner London are required to develop and introduce RoWIPs by 2007. The Government expects that these should provide better facilities for equestrians and other users who have not been so well served in the past. Authorities must consult Local Access Forums, and this may provide horse owners and users with the opportunity to propose improvements alongside those sought by walkers, cyclists and disability groups. Improvement Plans will be incorporated into Local Transport Plans (LTPs), which will shape resource allocation. Thus they provide a means to influence significant public funding, although some concerns have been expressed about the proportion of funding which may be spent on delivering RoWIPs when set against other LTP priorities. Nevertheless by being actively engaged in the RoWIP process, the horse industry can highlight the inadequacies inherent in existing equestrian routes and can assist authorities in meeting their social, economic, health and environmental goals.

CASE STUDY - The Rights of Way Improvement Plans in Hampshire

The Countryside Agency has a demonstration programme to produce exemplar Rights of Way Improvement Plans. In Hampshire, research in connection with the exemplar plan has examined the needs of horse riders and carriage drivers. It identified how far they use public rights of way and other routes, the barriers to increased use, and the key issues regarding equestrian access.

ACTION 28: Local equestrian rights of way and public access

Action : Local Authorities to consider the horse industry's needs and to advertise and promote successful initiatives. Horse industry to contribute more effectively to local rights of way and planning processes and the resulting Local Transport Plans.

Responsibility : Regional horse structure, local horse networks, access bodies and Local Authorities.

Priority : Short-term.

Coordination

5.12 Overall, it is considered that, if riding is to prosper as a recreational activity and business sector in the future, it is essential to create a proper network of established, recognised, publicly funded and properly maintained routes. Access bodies will need to work together with regional and local partners, to analyse and evaluate all of the access issues, identify potential solutions and explore these with local, regional and national authorities. Some proposals put forward through the consultation process included:

- legislating for all public paths to be made available to all non-motorised users as they are in some other European countries. As well as transforming the

equestrian and cycling network, this would do away with the costly research and public inquiries into the status of paths, enabling resources to be concentrated on physical improvements where these are most needed;

- learning from the Land Reform (Scotland) Act 2003;
- bringing forward the date upon which the removal of bridleway rights on the basis of historic evidence will no longer be possible, in order to reduce the effort and funds which are now having to be spent on preserving existing equestrian rights of way; and
- using the existing statutory equestrian access for riding in Royal Parks, public open spaces and many commons, which have been providing superb facilities, in some cases for centuries, as a model to improve access to country parks and other land held by public bodies.

ACTION 29: Coordinated Plan for improving Statutory Equestrian Access

Action : To produce a definitive report outlining the true picture of equestrian access in England and Wales, and presenting a coordinated plan for protecting existing rights and improving these where possible.

Responsibility : Access bodies, with support from local and regional networks.

Priority : Medium-term – although progress will be in direct proportion to level of resources.

(b) Increase provision of other off-road equestrian routes and of areas with equestrian open access

5.13 As with statutory access, the question of improving non-statutory provision for riders and drivers generates considerable and widespread debate and concern. At one extreme, people consider that the only truly sustainable and equitable solution is for all routes to be statutory. At the other, many are equally clear that, on top of an extensive and well maintained public network, there is scope for farmers and other public and private landowners to provide voluntary access to their land for riding and driving, whether or not on the basis of permanent dedication, and whether or not a charge is made for the right of access. Access bodies will need to balance these competing views, and in addition to exploring the issue of public rights of way, find ways of extending, where appropriate, non-statutory access for the benefit of those riders and drivers who wish to use them.

Public and Private Organisations

5.14 The Forestry Commission has a concordat with the BHS on equestrian access to woodlands. It allows free access to riders, except where there is a proven need for management control of numbers. In some heavily used areas, the Commission makes a charge to fund necessary management. The Commission also occasionally grants permissive access so as to link bridleways and permissive routes which run on land owned by others, and provides opportunities for riding and trekking businesses. The Forestry Commission is dedicating its freehold estate for open access on foot under Section 16 of the Countryside and Rights of Way Act 2000. Many equestrians

consider that this should be extended to the right of access on horseback, in view of the particular dangers they face on the roads and the lack of an adequate off-road network for them to use. This would protect forever the important free access permitted for riders on Forestry Commission land in some parts of the country, should that land be sold.

5.15 The Forestry Commission's positive attitude towards equestrians is to be welcomed, but the new lead access structure should pursue ways of further improving and increasing access to Forestry Commission owned land. The horse industry should also take early steps to establish itself with Natural England which, from 2007, will take forward the Countryside Agency's role in the protection and enhancement of landscapes and the promotion of outdoor recreation and access.

5.16 As well as the Forestry Commission, a number of other public and private bodies are already engaged constructively in projects to open up new access opportunities. The Countryside Agency, for example, has supported the creation of the Pennine Bridleway (see below), whilst the BHS has been instrumental in the opening up of nearly 350 miles of long distance routes in the past two years as part of the Ride UK Project⁴⁴, including the Sabrina Way (Derbyshire – Gloucestershire), the Claude Duval Bridle route (Oxfordshire), the Three Downs Link (joining the Ridgeway with the South Downs Way) and the Three Rivers Ride (crossing the rivers Lugg, Wye and Usk, and passing through the Black Mountains and the Brecon Beacons National Park). At a more local level, groups like the Mendip Cross Trails Trust have also worked hard to open up new non-statutory routes. The work of these bodies is to be commended and encouraged.

CASE STUDY- The Pennine Bridleway

The Countryside Agency is developing this new National Trail as the first purpose-built long distance bridleway. At the start of the project, much of the route was not legally available for horse riders, so that new bridleway rights had to be negotiated with landowners. When completed, the Pennine Bridleway will run 350 miles, from the High Peak Trail in Derbyshire to Byrness in Northumberland. A 120-mile section from Derbyshire to the Mary Towneley Loop is already open.

CASE STUDY - The Mendip Cross Trails Trust

This charity has a proven track record of installing recreational routes for walkers, cyclists and horse riders. New routes are created to link in with and maximise the existing fragmented rights of way network. The trust identifies and surveys routes, negotiates with landowners, and instigates capital projects to install and promote routes on the ground. Among other forms of funding, the Trust has been successful in accessing funding from the Aggregates Levy Sustainability Fund. Part of this funding has been used to compensate farmers who agreed to have new rights of way across their land and have dedicated them in perpetuity.

CASE STUDY – The Ride UK Project

Under the project title "Ride UK", The BHS launched plans for the National Bridleway Network in May 2000. The aim of the project is to create a comprehensive network of community circuits and strategic linear routes for horse riders across the United

⁴⁴ See www.ride-uk.org.uk

Kingdom. Starting with existing national routes (such as The Ridgeway and the Pennine Bridleway), regional routes (including The Three Rivers Ride, Swan's Way and The Icknield Way) and the promoted circular rides, the network will build up over time into a comprehensive network of paths available to all users. The creation of promoted Community Circuits will ensure riders have easy access to local, mostly motor traffic free, routes. Regional routes link the Community Circuits, allowing longer rides, and reducing the need to travel by horsebox to places of equestrian interest. The National Routes will consist of major strategic routes across the Country linking up the regions and, potentially, linking into Europe. Ride UK brings together common objectives in health, sustainable development, recreation, and sport through effective partnership between land custodians, local government and the voluntary sector.

ACTION 30: Publish a Good Practice Guide for those interested in expanding local access for riding

Action : Organisations interested in expanding non-statutory access for riding would benefit from a Good Practice Guide incorporating the advice from those who have already learned their lessons the hard way.

Responsibility : Access Bodies, with support from local and regional bodies and networks.

Priority : Medium-term.

Access to Farmland

5.17 Engaging in dialogue with farmers and landowners to encourage them to allow use of their land by equestrians has been a valuable means of securing additional off-road riding and driving opportunities. Some local Bridleway Groups, such as the Matfield and District Riders' Association, have managed to negotiate permissive, and free, riding routes with generous local landowners. However, negotiating such routes can be very difficult and time consuming and often a landowner is only willing to offer routes over land for which they have little use, rather than where the route would be most useful to riders. More than 50% of the routes negotiated by the Association have subsequently closed when the landowners' plans or circumstances have changed.

5.18 Opinions differ, but many people feel strongly that until landowners are well paid for allowing the public onto their land, no real and permanent voluntary extension to the public bridleway system can be expected, as access is currently seen as a cost rather than a benefit and it is believed that it lowers the capital value of the land. The Government's Countryside Stewardship and Environmentally Sensitive Areas Schemes previously paid landowners to allow permissive bridleways on their land, but concerns were voiced that these were not always well targeted towards areas with high demand or particular need (although the Scheme did require any new bridleway to link with an existing bridleway or road).

5.19 The Countryside Stewardship Scheme (CSS) has now closed to new applicants and is being replaced by Environmental Stewardship (although existing

CSS agreements will continue until the end of their agreement period). Similar stewardship schemes operate in Wales, although the element details and requirements may differ. Environmental Stewardship has three elements, Entry Level Stewardship (ELS), Organic Entry Level Stewardship (OELS), and Higher Level Stewardship (HLS). ELS is a 'hands off' scheme with minimal administrative input and no on-farm advice. The development of access routes which meet local demand and are regularly used (to ensure they provide value for money) requires local consultation and significant administrative input including follow up care and maintenance visits. This is not possible under the 'hands off' ELS scheme design or considered practical to include, although the Government will consider any workable solutions to the problem.

5.20 Higher Level Stewardship (HLS) is based on farmers and land managers signing up to a menu of options intended to deliver specific environmental benefits in return for payment. The creation of permissive access routes, including bridleways, is one of these options. Routes created under HLS have to be in a place where there is a clear demand for the route – e.g. to join up existing, well-used bridleways to create a circular route, or to take horse riders away from busy roads. HLS could also be used to provide upgrades to open access under the Countryside and Rights of Way Act, for use by equestrians. An agreement holder would not be paid for the creation of a route which is unlikely to be used. Defra's Rural Development Service liaise with local access interests and the highways authority to assess the need for an access route, the likely usage and reactions from neighbours. Applicants are encouraged to produce evidence of need, such as letters from local equestrians or the support of their local access forum. The local Rights of Way Improvement Plan will be taken into account in assessing priorities, but the absence of a specific route from a Plan would not necessarily rule it out if there was a recognised local demand. Some observers believe that opening up access under this scheme could make the dedication of permanent statutory Public Bridleways even more difficult and expensive than hitherto; this will need to be watched as the scheme develops, and addressed accordingly by access bodies. The Conservation Walks & Rides website²⁶ gives information on all agri-environment scheme access routes, including maps and the duration of each agreement.

5.21 The Single Payment Scheme (SPS) is a new scheme which has been introduced in England in place of ten previous Common Agricultural Policy (CAP) related subsidy schemes. This allows for land used for some non-agricultural activities to be included within the farmer's claim. Horse riding along bridleways where no charge is made for access is one such unrestricted activity (in this context bridleway means any unsurfaced highway or route for which riding is allowed or for which a right of way on horseback exists - this may include statutory bridleways as well as other routes such as byways, permissive routes or field edges avoiding busy roads). It is a requirement that no damage must be done to the land (i.e. no damage such as to render the land incapable of agricultural use) and that all the other relevant conditions are still met – such as the Good Agricultural and Environmental Condition (GAEC) requirements laid out in the scheme's cross compliance conditions. This unrestricted arrangement only applies to routes where no charges are made: where a charge is made for access, e.g. a Toll Ride (see below), there

²⁶ <http://countrywalks.defra.gov.uk>

would be a 28 day limit on access during the ten months of the year that the SPS applies, or that section of the field would have to be declared as ineligible.

5.22 The SPS may prove to be helpful in improving and maintaining existing rights of way but was not designed to increase public access. Access bodies should consider pursuing options for building access more closely into future schemes, and increasing the scope of existing schemes such as the possibility of making off-road access a stand-alone option for landowners under the HLS.

ACTION 31: Equestrian routes on farmland, woodland and coastal areas

Action : Discuss and negotiate with Defra, the Rural Development Service (which administers Agri-environment Schemes) and other bodies to see how new land payments will affect existing and potential access on farmland; and also address other issues which concern landowners, with the aim of designing attractive 'packages' that will allow local authorities and local riders to negotiate with local landowners.

Responsibility : Access bodies.

Priority : Short-term.

Toll Rides

5.23 The setting up of toll rides by organisations, such as the Toll Rides Off-road Trust (TROT), is considered by some to be an imaginative and pro-active way of providing extra access to safe off-road riding.

CASE STUDY - The Toll Rides Off-road Trust (TROT)

TROT is a registered charity run by volunteers. It creates routes on private land, either linking to existing bridleways, avoiding dangerous roads, or establishing new rides. TROT has established over 350 miles of toll rides, which have in turn opened up many more miles of accessible bridleway networks. Riders pay around £100 a year. Landowners are paid some £200 a year per mile of ride and benefit from proper management and policing of access on their land. The flexibility of permissive rides appeals greatly to landowners at the outset. TROT advise that very few subsequently withdraw permission; approximately 5% were under threat at the start of 2005. TROT works mainly with farmers, as well as administering the Forestry Commission's permits in some areas.

5.24 It is widely acknowledged that in areas where there is little or no off-road provision, toll rides could be a 'life saver' for both local riders and the horse industry. Livery yards, for example, which are vital to a successful industry and a good indicator of the state of the industry in any given area, flourish where there is a good off-road network. Organisations such as TROT, which administer joint permits on a number of neighbouring toll rides, can provide benefits for both landowners and riders. Toll rides may also help to open dialogue between equestrian groups and landowners, and provide landowners with good experiences of opening their land to horse riders and carriage drivers.

5.25 However, some think that charging annual fees reflects elitist assumptions about leisure riders, or that it constitutes a form of discrimination against horse owners. Some question the value of toll rides, saying that access is neither permanent nor mapped, and the existence of toll rides makes it harder to secure the creation of new public rights of way. Toll rides are dependent on the structure of land tenure, and changes in land ownership can affect a route's existence. It is also argued that by creating a toll ride, pre-existing unrecorded rights or use which is approaching 20 years, can be prejudiced, and that riding schools and livery establishments need to be cautious of making investment decisions on the basis of facilities which may not be permanent.

5.26 Thus, although toll rides should not be promoted at the expense of the wider Rights of Way system, it is accepted that toll rides can provide links between established Rights of Way and other, voluntary access schemes (such as those under Agri-environment schemes) to make a connected network. They provide safe off-road routes, which may not have to be shared with walkers and cyclists; and many people are content to make use of any access rights, including those for which they are required to pay. They have a place in the broad scheme of things and it would be counterproductive to ignore them or to spend resources actively opposing them when ultimately their objective is to improve access for riders.

ACTION 32: Toll rides

Action : In conjunction with Action 31, incorporate toll rides, if viable, in the packages that local riding groups can discuss with local landowners as an addition to an adequate basic public provision.

Responsibility : Access bodies working with regional horse structure and local horse networks (Action 5).

Priority : Short to Medium-term.

(c) Continue safety education for motorists, riders and carriage drivers

Road Traffic Accidents

5.27 The BHS estimates that at least 3,000 road accidents every year involve horses. Fortunately, however, few involve rider casualties. According to the Department for Transport there were 132 casualties in 2004, with two fatalities, involving a ridden horse. This represents less than 0.05% of all reported casualties, but is still two fatalities too many (not to mention the suffering of the horses involved). The Society considers that official statistics should be collected for all horse-related road accidents, not just those where people are injured. This approach, which is already being pursued in relation to deer by the Deer Initiative (see below), would produce a more accurate picture of the overall equestrian road safety position and help to reduce accidents by identifying local blackspots which can be addressed by the highway authorities, and provide valuable evidence to back up campaigns on a local, regional or national level to improve road safety for riders. The Department for Transport, however, states that the police, who record all injury road accidents, do

not have the resources to record the much larger number of accidents that do not involve injury to a person. That applies to all road users, not just horse riders.

CASE STUDY – Road Traffic Accidents involving Deer

The Deer Initiative is a broad partnership of statutory, voluntary and private interests dedicated to "ensuring the delivery of a sustainable, well-managed wild deer population in England and Wales ". Road Traffic Accidents involving deer present a major problem in the UK, as well as in many other countries. The Highways Agency and the Scottish Executive, together with the Woodland Trust, the National Forest Company and the Deer Study and Resource Centre are funding new research to develop, for the first time, a stratified national system for recording information on deer related road traffic accidents occurring throughout the UK.

Improving Road Safety

5.28 The Department for Transport has been undertaking some excellent work to educate motorists to pass horses 'wide and slow'. It has also included measures for horse riders in the national road safety strategy, such as:

- Improving the driving test to give greater weight to horses as road users;
- Producing publicity to increase motorists' awareness of horse riders' vulnerability; and
- Providing funding to encourage take-up of The British Horse Society's Riding and Road Safety Test²⁷.

The Department for Transport will continue to educate drivers to be more aware of horse riders, and welcomes the horse industry's educational efforts.

5.29 Quiet Lanes and Home Zones classification²⁸ have been previously suggested as suitable vehicles for advancing the road safety agenda. The Department of Transport has clarified that neither are primarily road safety schemes, instead they aim to improve the quality of life for local communities. The department considers that only roads with low flows of traffic travelling at low speeds, or roads where such conditions are being engineered, are suitable for designation as Quiet Lanes or Home Zones.

5.30 In addition, the horse industry feels that more needs to be done on the education of cyclists, especially in relation to the use of bicycles on bridleways. It is also widely believed by the industry that an increase in the width and better management of roadside verges would significantly improve horse and rider safety. This latter proposal could be partnered with a reduction in the country lane speed limit and, possibly, a total ban of motorised vehicles on unmade tracks (although it is recognised that there are significant difficulties associated with this).

²⁷ Riding Clubs and some Pony Clubs also promote this test. Around 5,000 candidates a year sit it.

²⁸ As discussed in DfT's 'Consultation on Quiet Lanes and Home Zones' August 2004. The aim of Quiet Lanes is to maintain the character of minor rural roads by seeking to contain rising traffic growth that is widespread in rural areas; the aim of Home Zones is to improve the quality of life in residential roads by making them places for people, instead of just being thoroughfares for vehicles.

5.31 The BHS's continuing emphasis on the wearing of suitable safety hats has been widely commended, with many people feeling that this policy should be more aggressively pursued in order to achieve the goal of making the wearing of safety hats compulsory for all equestrians on public roads.

5.32 Finally, particular attention must be paid to road crossings; and it has been argued that controlled crossing points for equestrians should be mandatory for all roads with traffic flow over 14,000 vehicles per day. Access bodies will need to explore this and the other road safety issues above in the process of developing and leading a renewed campaign on equestrian safety.

ACTION 33: On- and off-road safety campaign

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| <p><u>Action</u> : Further discussion with Department for Transport on the development and delivery of a campaign to educate riders, carriage drivers, cyclists and motorists on how to behave correctly whilst using both on and off-road routes.</p> <p><u>Responsibility</u> : Access Bodies and use of improved industry communications arrangements (Action 26 and 3).</p> <p><u>Priority</u> : Medium-term.</p> |
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(d) Ensure urban and suburban riding and carriage driving are promoted and improved

5.33 Riding is often mistakenly seen as an exclusively rural activity. Most people live in urban areas, and there is a huge demand for access to safe places to ride on the outer margins of towns and cities, as well as within urban centres. This demand for safe urban riding and driving will only increase as riding becomes more popular in line with other objectives in this Strategy, and as young people from rural areas with experience of and an interest in riding are increasingly moving into the towns. It is vital that this is not forgotten when considering the provision of equestrian routes, and that safe places to ride and drive horses in urban areas are maintained and increased.

5.34 It is essential that riding tracks, riding schools and livery stables are regarded as a coherent whole, with easy access by public transport. There are already excellent examples of equestrian facilities in urban areas being granted planning permission in order to provide healthy recreational exercise.

5.35 It is important for equestrian facilities to be provided and maintained in close proximity to major housing developments. If there is nowhere to ride outside the confines of a riding school arena, then many in the horse industry believe that riding school clients will be discouraged and people will become unenthusiastic about taking up riding and driving.

ACTION 34: Urban and suburban riding and driving

Action : Mount a high-profile campaign to alert people, local authorities and the Office of the Deputy Prime Minister to the benefits of equestrianism, the availability of urban riding and driving and the need to provide equestrian facilities to serve areas of major new housing development.

Responsibility : Improved industry communications arrangements (Action 3); Access bodies and regional horse structures.

Priority : Short and Medium-term.

Aim 6: Consider the environmental impact of the horse

6.1 Horses have always been an important part of the rural landscape, and horse owners who own land are, as much as farmers, stewards of the countryside. The horse industry can play a valuable role in protecting and enhancing the natural environment. Land used by the industry, such as grazing land, gallops, access routes and equine buildings all impact on both the visual and physical nature of the environment and the horse industry should be encouraged to help improve the quality of the land it utilises. Horses can play a valuable role in maintaining the quality and diverse characteristics of the English and Welsh countryside.

6.2 As well as the positive visual effect of horses grazing in grassy meadows, there are also potential negative visual impacts associated with horses, particularly on urban fringes. These may also be linked with adverse effects on horse welfare, for example due to makeshift stabling and unsafe fencing as well as field debris. Likewise, overly poached winter fields are not only unsightly, but may lead to increased risk of health problems such as mud fever, and have negative environmental impacts such as soil erosion. The failure to remove ragwort from horse paddocks and fields used for hay production can result in irreversible and often fatal effects on horses' livers. However, in some circumstances, what might not be seen to look good might be best in terms of horse welfare. For example, small 'bare' paddocks are often necessary for ponies prone to laminitis, but will not have the positive visual impact of a large grassy paddock.

6.3 Many horse owners use electric fencing as it allows the use of strip grazing, and is a safe method of containing horses and grazing them in smaller groups or alone but within visual sight of others, thus reducing risk of injury but supporting their natural herd instinct. However, others may feel that the white tape electric fencing in particular, is not aesthetically pleasing and in some areas could cause a visual intrusion and break up traditional field boundary patterns. Guidance on ensuring that electric fencing is used as inconspicuously (such as using green or brown alternatives) but as safely as possible, is often produced by bodies such as Areas of Outstanding Natural Beauty (AONBs)⁴⁵ or local authorities. However, many horse owners are concerned that there is a lack of factual information about the safety of the darker coloured alternatives. This is an issue which will need to be pursued further to ensure that guidance is given on electric fencing which is positive for the safety and welfare of the horse, but also that helps to maintain a visually pleasing countryside.

6.4 The horse industry can play an important role in contributing positively to creating a healthy, sustainable, diverse, well managed and wildlife rich environment for the future.

⁴⁵ Kent Downs AONB have produced a Landscape Design Guide which seeks to offer clear and practical advice for land owners. see www.kentdowns.org.uk

It is proposed to achieve this through:

- improving standards of land management;
- encouraging correct and safe manure storage and disposal; and
- encouraging the use of horses in conservation grazing projects which support wildlife and pasture biodiversity.

6.5 The creation of Natural England, which will take forward the conservation and enhancement of biodiversity and geodiversity work of English Nature⁴⁶, as well as the environmental land management functions of the Rural Development Service, will provide an excellent opportunity for the horse industry to engage more effectively in this area.

(a) Improve standards of land management

6.6 While it is recognised that some of the problems such as poached or over grazed fields are not always avoidable, there is a growing recognition that positive action could be taken in many instances. Proper land management can be hugely positive for both the general public and the horse owner, and have a beneficial effect on a horse's health and on the surrounding wildlife. Sound horse pasture management can lead to an important reduction in equine worm infestation and control of poisonous plants such as ragwort; and the varied mix of grass and herb species can benefit equine health, reducing the risk of obesity or lameness. Moreover, well-managed land can sustain horses for longer periods of time and can be utilised more efficiently. For the non horse-owning visitor or inhabitant of the area, it creates a more positive relationship with the equine world, and a greater appreciation of the benefits of encouraging equine activities.

6.7 Horse owners or keepers have the capacity to contribute greatly to the character and quality of their local area. In addition to creating a positive impact on the landscape and land quality, horse keepers can make a valuable contribution towards encouraging biodiversity and wildlife. For example, native hedgerows provide shade and shelter for grazing horses whilst providing a food source and habitat for a variety of wildlife. Local Authorities and bodies such as the Countryside Agency or English Nature can play a key role in providing information and guidance for horse owners and keepers in their individual areas. Initiatives such as Surrey County Council's Horse Pasture Management project (see below) or the Kent Downs Area of Outstanding Natural Beauty's Horse Pasture Management workshops are extremely valuable in encouraging recognition of the impact the horse has on the local landscape. They also help to set standards of 'best practice' for horse keepers to manage sites in ways that ensure they contribute positively to the character of the county and the protection of the environment.

CASE STUDY : Surrey County Council Horse Pasture Management Project.

The Horse Pasture Management Project was Britain's first Council- supported and funded, online resource giving advice on practical ways horse owners can maintain their paddocks to give maximum benefit to their animals as well as to the landscape

⁴⁶ English Nature and some parts of the Countryside Agency and the Rural Development Service will be brought together in 2007 to form Natural England. See www.defra.gov.uk/rural/ruraldelivery/natural-england.htm

and environment. It was initially created by Surrey County Council and The Countryside Agency and continues to be supported by Surrey County Council, the Lower Mole Countryside Management Project and several of the County's District and Borough Councils. The Project has produced informative calendars and advice notes to provide year-round grassland management advice for horse keeping sites across Surrey. The project also offers free site-specific advice via telephone, site visits, emails etc. For more information see www.surreycc.gov.uk/horsepastureproject

ACTION 35: Encourage Local Authorities and others with land management responsibilities to promote good pasture management

Action : Encourage Local Authorities and others with land management responsibilities, to work with the horse industry, to develop pasture management projects in order to promote good land management and provide 'best practice' advice.
Responsibility : British Horse Industry Confederation (BHIC) and Government to promote the value of such projects. Local Authorities and other bodies, to develop them as appropriate in conjunction with the horse industry and those who have already made advances in this area, such as Surrey County Council, and advisory organisations such as the Countryside Agency and English Nature.
Priority : Short-term.

ACTION 36: Code of practice for good land management

Action: Explore the possibility of developing a joint Industry/Government code of best practice for all land owners/managers in the horse industry, to encourage better land management (taking into account equine welfare as well as biodiversity and wildlife conservation), building on the good work of Surrey County Council and others.
Responsibility : The BHIC, BHS, Local Authorities and bodies such as Countryside Agency, English Nature and the Environment Agency.
Priority : Medium-term.

Ragwort

6.8 The British Horse Society's (BHS) campaign on ragwort led to a welcome involvement by Government in ensuring that this toxic weed does not spread to land where there is a threat to horses and other grazing animals. A Code of Practice on how to prevent the spread of ragwort in England was published in 2004⁴⁷, in

⁴⁷ Code of Practice on how to prevent the spread of ragwort (June 2004) See www.defra.gov.uk/environ/weedsact/default.htm

consultation with The BHS and other stakeholders to provide advice on identification of common ragwort, risk assessment and priorities for ragwort control. Correct disposal of ragwort is an important part of overall control to prevent spread through seed dispersal and re-growth from root sections and Defra has also produced further guidance on disposal options of ragwort⁴⁸.

6.9 Previously, there was concern that action to force landowners to clear ragwort from land grazed by or near horses was not quick enough, and often too late. The Government has accepted this and priority is now given to investigating complaints where there is a risk of spread to land used for keeping or grazing horses or other animals.⁴⁹ Where no action is taken by the land owner or occupier to control ragwort and there is a threat to animal welfare, Defra (or the Welsh Assembly, if the land is in Wales) will issue an enforcement notice under the Weeds Act 1959 requiring clearance⁵⁰. If an enforcement notice is not complied with, a contractor will clear the weeds and then costs will be recovered from the owner/ occupier of the land. The horse industry hopes these measures, combined with initiatives such as the BHS-organised 'Ragwort Awareness Week', will prove to have a significant effect on controlling the spread of ragwort.

Land grazed by horses

6.10 The eligibility of land grazed by horses in the new Single Payment Scheme has been widely welcomed by the horse industry in England (see Aim 3 and 5 for more information on eligibility and conditions of the Single Payment Scheme). The European Union is moving away from direct payments for production and towards initiatives to encourage landowners to take better care of the countryside. It is essential that landowners with horses are included in these initiatives, which have an important cross compliance, land management angle.

6.11 There is, however, a huge lack of information about acreage grazed by horses, and where these areas are located. This is a disadvantage both to the Government and the industry itself in that it inhibits future planning of both environmental and other policies. The National Equine Database (see Aim 8) should be of considerable assistance in gathering this information, but monitoring will be needed to see what, if any, further information is required when it is fully up and running, and consideration will need to be given as to how this might be obtained.

⁴⁸ Guidance note on the Disposal Options for Ragwort (2005) See www.defra.gov.uk/environ/weedsact/default.htm

⁴⁹ In all cases, Defra expects the complainant to have approached the owner or occupier of the land on which the weeds are growing before making a formal complaint.

⁵⁰ The introduction of the revised procedures 41 enforcement notices were issued in 2004 and so far this year, 68 enforcement notices have been issued. These have proved effective in ensuring that action is taken.

ACTION 37: Produce a clear map of where horses are grazed

Action : Evaluate the available spatial information about where horses are grazed, and the quality of land horses are kept on, and explore the development of a means to fill any subsequent gaps.

Responsibility : The BHIC, Defra, the Welsh Assembly and other bodies such as the Countryside Agency, using tools such as the National Equine Database, and exploring the utilisation of existing farm and other surveys.

Priority : Medium-term.

Planning

6.12 It is essential that the needs of horses, the effects of horse keeping on the landscape and the pressure on local infrastructure such as commons or bridleways, are taken into account in the planning system. The horse industry welcomes the Office of the Deputy Prime Minister's Planning Policy Statement 7, produced in August 2004 which included a new section giving guidance on equestrian accommodation intended to alleviate some of the problems over planning permission which have been experienced by horse enterprises. However, no monitoring has yet taken place to assess whether this new guidance has been effective overall, and the horse industry feels that people are still being frustrated by the varying approaches which different planning authorities are taking to equestrian applications. (see Aim 3)

CASE STUDY - South Shropshire District Council planning advice

South Shropshire District Council has produced a detailed Practice Note, available on-line, which gives information on planning law and practice concerning development which involves the keeping and use of horses. Equestrianism and horse-related activities are increasingly popular in this area. The Council has actively supported new and existing horse enterprises, while at the same time producing advice such as the Practice Note to help ensure that necessary consents are sought.

6.13 The welfare needs of horses should also be taken into account at both national and local level when implementing other rural and access initiatives. For example, the current policy of promoting easier access across footpaths by replacing stiles by kissing gates is, of course, welcome, but these gates are dangerous for horses, particularly young foals. Local authorities need to be made aware of such issues, and encouraged to take them into account when deciding and implementing their priorities.

ACTION 38: Secure a more consistent performance by Local Authorities on equine planning issues

Action: Develop a closer relationship with local authorities, and explore the possibility of providing them with training and education relating to equine planning issues, and to discuss how the differing approaches which local authorities have to horses can be harmonised.

Responsibility : The BHIC, with Government, including the Office of the Deputy Prime Minister and Local Authorities.

Priority : Medium-term.

(b) Encourage correct and safe manure storage and disposal

6.14 The storage and disposal of horse manure is an ongoing issue for horse owners. Some horse waste activities, such as manure spreading, are currently considered by the Environment Agency to be a low risk waste activity and are, therefore, covered by the Agency's Low Risk initiative.⁵¹ A recent European Court of Justice ruling that livestock effluent may not be classed as a 'waste' when it is used as a soil fertiliser should also have beneficial effects for the horse industry and may help to reduce the controls on the storage of horse manure when used in this way.

6.15 The better dissemination of best practice and pragmatic solutions for the horse owner or business in terms of waste management needs to be a priority. This includes increasing awareness of existing guidance to aid land- and horse-owners, such as the Environment Agency's Pollution Prevention Guidance note for Stables, Kennels and Catteries,⁵² and material produced by local authorities such as the Surrey Horse Pasture Management Project.⁵³

6.16 Consultation on the draft Strategy revealed a significant concern within the horse industry that the situation whereby horse manure with an agricultural origin was treated as an agricultural waste (like cattle manure) while manure from other horses was defined as a 'controlled waste', was ambiguous. However, the Government confirms that this situation is soon to change. It is intended that, from early 2006, agricultural waste will be treated as industrial waste. This will mean that horse waste arising from agricultural premises will be subject to the same controls that already apply to similar waste arising from non-agricultural sources. As noted above, separate arrangements exist to deal with horse waste to be used as fertiliser.

⁵¹This initiative has been set up to identify low risk waste activities that are not exempt from waste management licensing but which do not justify enforcement. This means that the Environment Agency (EA) takes the view that it would not be in the public interest to require a waste management licence for the activity. It should be noted, however, that if any activity is carried out in a way likely to pollute the environment or harm human health, the EA would be obliged to consider taking enforcement action. More information on this initiative can be found on the EA website at <http://www.environment-agency.gov.uk/subjects/waste/1030716/1098094/?lang=e>

⁵² Pollution Prevention Guidelines number 24 – Stables, Kennels and Catteries. www.environment-agency.gov.uk/commondata/acrobat/ppg24.pdf

⁵³ Surrey Horse Pasture Management Project Advice Notes www.surreycc.gov.uk/horsepastureproject

ACTION 39: Promotion of waste management information

Action : Ensure all horse owners have access to information regarding safe, correct, waste disposal; and horse industry bodies and Government to continue to liaise on pragmatic solutions to equine manure waste storage, composting, spreading and disposal.

Responsibility : The BHIC, Government and the Environment Agency.

Priority : Short-term.

(c) Encourage the use of horses in conservation grazing projects which support wildlife and pasture biodiversity

6.17 As noted above, good field management is ecologically important because it improves the overall usefulness of the paddock. Horses can have a beneficial environmental effect on the land they graze. The use of sprays and fertilisers on land used for horses is usually much reduced, compared to arable land and other farm livestock, and a variety of herbage, including wild flowers, which is beneficial to the horse is often encouraged.

6.18 In addition, well managed equines can be beneficial in the protection and encouragement of wildlife and plant species, in meadows and pasture. There are instances where the close method of grazing that horses employ actually enhance the habitat for certain wild flowers. There are 75 conservation schemes operating in England and Wales, whereby native pony breeds help to keep hill vegetation open by eating rough grasses while avoiding heather and flowering plants. These schemes underline the importance of using British native breeds, which are not only best suited to the climate, but also help to protect the future of these ponies, many of whom are rare or endangered breeds. There are industry guidelines and codes of practice on the welfare of equines used in conservation grazing projects which are available from organisations such as the BHS⁵⁴, Exmoor Ponies In Conservation⁵⁵, and the Grazing Animals Project⁵⁶.

CASE STUDY - Pony grazing at Crymlyn Bog National Nature Reserve

Historically, landholders on the western edge of the site have grazed strips of the bog adjacent to their holding. This practice was stopped after the second world war and this priority habitat now has problems with reed and scrub encroachment. The scrub encroachment is being addressed by annual contract clearance but the only viable method to reduce the reed cover is to introduce light summer grazing (so as not to disturb too many nesting birds). A method which has proved successful on Anglesey is to use hardy (Section A) ponies to graze the area. The ponies are used to the wet conditions and are born and bred on a very similar habitat. It was, therefore, decided to transfer 10 ponies from Anglesey to Crymlyn. A paddock on the edge of the site was fenced off and a 100 metre transect through the reeds will be surveyed regularly

⁵⁴ Code of Practice titled the Welfare of Horses, Ponies and Donkeys used for Conservation Grazing

⁵⁵ www.exmoorpony.org

⁵⁶ www.grazinganimalsproject.org

to monitor the success of this experiment. If successful, the herd will be increased using surplus stock with the aim of establishing a breeding herd.

6.19 There have also been welcome developments in using native draught horses in logging. These horses, many of whom are also rare breeds, are invaluable for environmentally sensitive hillsides or those mountainous areas which are too steep for machinery.

6.20 Notwithstanding the priorities detailed in Aim 5, consideration must also be given to the effect of equestrian recreational activities on vulnerable habitats and wildlife. The planning and management of access and recreational activities in natural areas should be conducted in a way that respects and safeguards the natural environment. A guide to improve and increase opportunities for outdoor sport and recreation in ways that protect the environment, called *Best of Both Worlds Guiding Principles*⁵⁷, is currently being developed by a number of outdoor recreation groups. The horse industry may want to consider becoming involved in the promotion and development of this guidance, as well as committing to its principles.

ACTION 40: Information on conservation grazing

Action : Review existing information, guidelines and codes of practice covering conservation grazing and, if necessary, produce a national code to support and encourage this practice.

Responsibility : BHIC working with organisations such as the BHS, Exmoor Ponies In Conservation and the Grazing Animals Project, as well as native breed societies and other environmental conservation organisations.

Priority : Medium-term.

⁵⁷ The Best of Both Worlds principles are being developed by a working group led by the Countryside Agency. See www.countryside.gov.uk

Aim 7: Encourage Sporting Excellence

7.1 Great Britain is already successful in many areas of equestrian sport, and the sporting strands of the industry have been recognised by Government at all levels for their achievements and potential. At the Olympic Games and Paralympic Games in Athens in 2004, British riders won more medals than any other equestrian nation: an individual Gold medal, a team Silver and an individual Bronze at the Olympics and five Gold and three Bronze medals at the Paralympics. The British Horse Industry Confederation (BHIC) and Government look forward to building on this success in the 2008 Games and especially at home in the 2012 Games in London where an outstanding performance will provide a substantial boost to the industry.

7.2 Equestrian sport is sometimes criticised for concentrating too much on the elite. This is more a perception than a reality. The profile of elite activity attracts media attention but underlying this there is a great deal of work to support and develop sport and recreation at all levels. However, it must be recognised that that elite success helps to 'pull' people into equestrianism, and to encourage riders to aspire to higher standards. It is evident that the successes enjoyed in rugby union, especially after England's World Cup win in 2003, and the Welsh Grand Slam in 2005, have inspired young players to turn to rugby as their sport of choice. Success in all equestrian sports will enthuse more people to start and stay in horse sports in the knowledge that those who persevere can succeed.

7.3 Sporting success can only be achieved through a combination of factors, all of which need to be got right:

- clearly defined plans with targets over a set period;
- attention to detail;
- a well organised and resourced governance structure;
- good marketing;
- solid athlete development programmes for horses and riders;
- good competition structures;
- good facilities;
- adequate and open access for young people;
- dynamic talent spotting programmes;
- advanced sports science and medicine;
- outstanding coaching structures;
- access to well bred and produced horses; and
- support for schools, clubs and "grass roots" riders.

7.4 A range of initiatives catering for some of these needs is already in place. The British Horseracing Board has a clear plan of action in the Modernisation of British Racing⁵⁸, is well governed and has a range of talent development programmes run primarily through the British Racing Schools. With its member bodies, the British Equestrian Federation (BEF):

- is developing a new governance structure for itself over the next decade;

⁵⁸ See <http://www.britishhorseracing.com/>

- has a clear plan of action;
- has in place Lottery Sports Fund and Sports Council funded World Class Performance, Potential and Start programmes to identify, nurture, promote and support the most talented riders; and
- has sports science and medicine programmes for horses and riders.

7.5 But there is much more to achieve. The BEF's Strategic Plan for 2005-2009⁵⁹ covers a range of issues which correlate with this Strategy, and may be read in parallel with it. Additionally, encouragement of excellence is dependent on all of the other components of this Strategy being achieved, as mentioned above. Thus the proposals set out in this Aim concentrate on the areas where the greatest specific development resource is required to encourage genuine and sustainable sporting excellence while not duplicating the other strategic aims. So, for example, the need to develop a regional structure for the horse industry, which will, among other advantages, help to promote sporting excellence, is covered under Aim 1.

(a) Extend coaching development programme

7.6 The member bodies of the BEF are developing and implementing a unified Coaching Development Programme for all sport and recreation. It is devised to new "UK Coaching Certificate" standards set for all sport with the National Governing Bodies and Sports Coach UK, and will also relate to standards being developed by the International Equestrian Federation. The programme is relevant to all equestrian sports. Its propagation would raise standards throughout the industry, thus helping to increase participation.

ACTION 41: Coaching Development Programme

Action : Extend the BEF's coaching development programme to other organisations wishing to enhance their own coaching standards.

Responsibility : BEF.

Priority : Short-term.

CASE STUDY - Coaching and development in other sports

The governing bodies for rugby union, swimming, sailing, football, cycling, cricket and tennis have adopted robust policies for coaching and coaching development. Levels of participation and success in these sports are rising as a consequence of investment of effort in professionalism in the area. The work helps to bring the industries surrounding the sports together in a more cohesive manner.

⁵⁹ See www.bef.co.uk

(b) Improve the standard of facilities

7.7 Like golf, horse racing has driven up the standards of its facilities for sound commercial reasons, providing environments that encourage take-up, social interaction and professional development. This cannot be said, to the same degree, of those in the sporting and recreational equine world. The BEF is developing a strategy with its member bodies to encourage improved facilities. This work takes account of the support required for elite development, competition at all levels, coaching and training at all levels, access to the countryside, facilities for clubs and schools for the able bodied and disabled. Sharing this within the industry will widen the benefits for all sectors.

CASE STUDY - Cricket Academy

Elite performance in cricket has seen a significant increase in the levels of professionalism in cricket and, as a consequence, the success of the national cricket team. A national equestrian institute, as defined in the BEF Facilities Strategy, carefully designed to meet the needs of equestrian sport and recreation will bring the same benefits to success in the equine world.

ACTION 42: Facilities Strategy

Action : Share the BEF's Facilities Strategy with other riding bodies.

Responsibility : BEF.

Priority : Short-term.

(c) Extend long-term athlete and equine development programmes

7.8 Long-term athlete development is used in various sports. It is about achieving the correct training, competition and recovery throughout a young athlete's career, particularly in relation to the important growth and development years of young people. It provides a framework for individuals and their connections to help define their best route to maximise potential. It helps people to learn to enjoy themselves, to train, to compete effectively and ultimately to win. The BEF's member bodies are introducing a long-term athlete development programme to ensure that young people starting in equestrian sport and recreational activity enjoy the experience and have fun.

CASE STUDY - Long-Term Athlete Development in swimming

Since the late 1990s swimming has incorporated long-term athlete development in its training and competition programmes, and made significant changes in the way the sport is organised for young people. *The Journey Through Swimming* is a guide from club through county, district/regional and national competition to possible selection for international representation. It explains not just what can be expected at each level, but why. Some swimmers will journey all the way, some only part of the way, but all will have the best chance of reaching their full potential if they are treated as individuals. It is important within the competitive programme that individuals can compete in events which are appropriate to their stage of development and talents.

This is reflected in the different formats for competition, which helps to ensure that the coach can select levels of competition appropriate for their swimmers.

7.9 The concept of long-term development has equal value for young horses. For example, by establishing a protocol whereby the best young horses are trained by the best trainers, identifying and publicising the key components in successfully training young horses, and perhaps holding courses to train trainers and developing an accreditation scheme. Long-term equine development and long-term athlete development should be related so that eventually the best horses are ridden by the best riders.

ACTION 43: Long-term Athlete and Equine Development Programmes

Action : Extend BEF's Long-term Athlete and Equine Development Programmes to other equine organisations wishing to enhance their interests in encouraging excellence.
Responsibility : BEF.
Priority : Medium-term.

(d) Encourage unaffiliated bodies to engage

7.10 Many local sporting bodies organise equestrian activities without being linked to the national governing bodies of the sport in question. Sometimes rules and regulations are not administered well, and standards of insurance and health and safety are not what they should be. While costs may be lower for participants, the experience can be disappointing. Bringing such 'unaffiliated' groups into direct membership of the existing governing bodies will raise standards, give competitors a better experience and encourage excellence. These groups will be encouraged to reconsider their roles and work with the relevant governing body, while governing bodies should help them to join.

ACTION 44: Affiliation

Action : Market to unaffiliated groups the benefits of affiliation.
Responsibility : BEF.
Priority : Short-term.

Aim 8: Improve the quality and breeding of horses and ponies

8.1 Breeding higher quality horses and ponies in England and Wales will benefit the horse industry and the rest of the nation. Increasing both the value of horses and ponies bred, and the market share of breeders and studs, will boost the economic and employment benefits that these enterprises bring to rural areas and also improve the balance of trade. Breeding competition horses and ponies with good temperaments and of such conformation and health that they remain active for much longer will also benefit recreational riders by making better quality horses and ponies available to them through a cascade effect.

8.2 Indiscriminate breeding needs to be reduced and in order to produce horses and ponies of the quality that customers require, foals should only be bred from the best, in whatever way that is defined by the governing bodies. Although the UK remains a world leader in thoroughbred breeding, it has slipped to third position in terms of sales. Competitive dressage and show jumping horse-breeders now purchase a large proportion of their horses from overseas competitors, who market them more effectively. The UK's native and indigenous horses and ponies are still supreme, and representative eventing riders are mostly mounted on horses bred in the UK, but overseas breeders are gaining ground in both areas.

8.3 The initial consultation clearly indicated the need for greater cooperation. It highlighted problems arising from the fragmentation of the breeding sector, which is composed of a large number of often small organisations. Marketing, lobbying and general communication can be confusing and ineffectual when so many are involved. Among overseas competitors, considerably fewer organisations are involved in breeding and, in the main, they have a central coordinating body. The consultation also showed that many breeders consider they are engaged in an expensive, time-demanding occupation without commensurate financial returns in common with the circumstances of many riding schools and livery yards.

(a) Establish lead bodies to assist in the improvement of the quality of horses and ponies

8.4 There can be few, if any, other countries with as many organisations concerned with breeding as the UK. These, however, fall into three distinct sectors - thoroughbred and arab racing, native and indigenous breeds, and sport horses - each with unique characteristics. All three contribute to the stock of recreational horses and ponies. Racing and thoroughbred breeding is exceptionally well coordinated and from this there are lessons to be learned by the other two sectors. Native and indigenous breeds have different organisations (in some cases more than one per breed) dedicated to maintaining them. The British Equestrian Federation (BEF) has established British Breeding to provide leadership in the breeding of sport horses which are generally of mixed blood (see diagram).

8.5 With some notable exceptions, there is a serious shortage in marketing skill within the sector. Where marketing does take place, it is fragmented due to the excessive number of organisations involved, many with small budgets, and the consequent confusion in the minds of potential buyers about where to go for advice and viewing. The British Horseracing Board promotes the British Thoroughbred, at home and abroad, working with Thoroughbred Breeders Association (TBA), the Sales Houses and UK Trade and Investment. The remainder of the breeding sector needs to unite, pool resources and employ professionals in order to publicise the merits and successes of their horses. Virtual centres should be established where young stock can, even at short notice, be professionally presented, on behalf of their owners, to prospective buyers.

8.6 Many breeding organisations hold grading, evaluation and performance testing events, all using different systems. There needs to be some standardisation in order to promote sales and marketing and help potential buyers understand the scores. Initially this would involve no more than using the same range of marks (for example 0 -10), and the same headings (paces, conformation etc), for each characteristic assessed. There are also opportunities for societies to share the overhead costs of evaluations by holding them at the same location on the same day.

CASE STUDY - Young Horse Evaluation Scheme

The Young Horse Evaluation scheme, promoted by the BEF and South Essex Insurance Brokers, objectively assesses potential soundness, trainability, jumping ability, paces and temperament in four-year-old horses. The evaluations:

- provide data about stallions and mares to enable the earliest possible identification of good stock;
- enable the development of estimated breeding values (see paragraph 8.13 below);
- indicate where quality lies in individual horses;
- expose the most talented young horses and provide a market for young evaluated horses;
- provide information of value in subsequent training programmes; and
- supply reliable material for research and development.

The work sheets are available for use by other organisations.

8.7 The TBA takes care of the needs of the racing thoroughbred breeding sector. However, in respect of the other breeding sectors the establishment of lead bodies to assist in the improvement of the quality of horses and ponies would:

- encourage greater cooperation within and between the breeding sectors;
- provide a more efficient communication network between breeders, breeding organisations, competitive and recreational riders and drivers and their organisations;
- develop much closer links between thoroughbred and non-thoroughbred breeders;
- speak for the breeding industry with a single voice where appropriate; for example, when dealing with Government;
- provide centralised sources of breeding information and advice;
- enable qualified and experienced staff to be employed to undertake marketing and publicity;

- join forces with the national tourist boards to promote buying-tours of studs for potential home and overseas buyers;
- establish centres where quality young stock from many breeders can be professionally presented for sale;
- encourage market research into the requirements of buyers of sport and recreational horses and ponies, to match the knowledge already available for racehorses and native breeds;
- demonstrate and publicise the benefits of using proven stallions and semen over indiscriminate breeding;
- research the effect of introducing an industry-monitored stallion approval scheme;
- reduce duplication of effort between breeding organisations;
- offer the opportunity to develop Breeders Support Units, which could become resource and educational centres for breeders, develop 'flagship' breeding schemes and evaluate genetic progress, as well as facilitate work currently being carried out on a voluntary basis to improve breeding;
- help persuade breeding organisations of the need to introduce more standardised systems of evaluation;
- help publicise the successes of equines identified as having potential during evaluations, and encourage the entry of young stock for evaluation;
- help make best use of the National Equine Database (see Action 46 below); and
- publicise the benefits of the Breeders' Quality Mark Scheme (see below) to both studs and customers, and encourage studs to join.

8.8 Such entities would need to be seen by the existing breeding organisations, with their different perspectives, as representative, non-threatening, non-partisan bodies. Three such lead bodies are envisaged. (1) Sport Horse Lead Body (possibly British Breeding); (2) Native and Indigenous Horse and Pony Lead Body; and (3) Recreational Horse and Pony Lead Body. Because there are issues which would concern the whole industry, there needs to be a mechanism whereby these three bodies, together with the TBA, can act in concert when the needs arise (this could perhaps be formulated through the British Horse Industry Confederation, BHIC).

8.9 In the spirit of cooperation and cost sharing, consideration should be given to the statements made in Aim 1 where a National Equine Centre is being promulgated. Such a centre could accommodate many of the breeding organisations, whose headquarters often depends upon the location of the person currently holding the post of secretary, resulting in considerable savings in overheads and more effective working. It could possibly provide a venue for evaluations and gradings, a central sales point for overseas buyers and offer a central attraction for those interested in the non-racing thoroughbred, the sport horse and pony and recreational horse and pony to match those in many other European countries. Thoroughbred breeding, of course, already has a recognised centre at Newmarket.

ACTION 45: Lead bodies to assist in the improvement of the quality of horses and ponies

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| <p><u>Action</u> : Establish lead bodies to assist in the improvement of the quality of horses and ponies. <u>Responsibility</u> : BHIC in the first instance. <u>Priority</u> : Short-term.</p> |
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(b) Capitalise on National Equine Database to improve breeding

8.10 The quality and performance potential of some British equines is as good as anywhere in the world. Unfortunately, this is a small pool, which is overshadowed by many mediocre animals. To prevent further erosion of the equine breeding industry and to recover lost ground it is essential to improve the overall quality of the national herd. The vast expertise and experience of domestic breeders is not being best utilised as there is a tendency to act in isolation. The solution lies in creating a comprehensive national data source, containing breeding and performance information, through which all can benefit from each other's experiences.

8.11 The National Equine Database (NED) is a collaborative project between Defra and the horse industry. It will provide a central source of reliable information on horses bred, owned or registered in the UK. From 2006, information should be available to the public online. Buyers, sellers and breeders will have one-stop access to a horse's name and any previous name, registration number, breed, sex, age, height and pedigree together with any competition evaluation and grading results. Breed societies, stud books, competition disciplines and other responsible bodies will supply verified pedigree, performance, evaluation and grading (PPEG) information on a voluntary basis. Government is providing the bulk of the funding required to establish NED and to manage the processes involved, with the equine industry making a significant contribution through participation in the planning process, providing professional advice, contributing data and in terms of public relations and publicity. When fully established, the NED organisation will need to be self-financing to cover servicing and development costs. Revenue will be derived from the sale of data, with an on-going contribution from Defra to cover its interests in the maintenance of the core data system. Other benefits of the Database are that it will help to provide more accurate information on the size and shape of the equine industry, assist with equine welfare in the identification of keepers of abandoned animals and deterring theft (when used in conjunction with microchipping) and demonstrating the UK's compliance with EU passport legislation.

8.12 For the Database to succeed fully in providing data to support improvements in equine breeding, it is essential that the industry bodies called on to provide voluntarily PPEG information actually do so. It is equally important that the much heralded system of Unique Equine Life Numbers (UELNs) is introduced as quickly as possible.

8.13 In addition to its benefits for individual breeders, purchasers of horses and commercial and research and teaching bodies, the National Equine Database provides opportunities for the breeding sector as a whole. It will be a source of

information to enable Estimated Breeding Values of stallions and mares to be calculated. This will allow both casual and professional breeders to compare the breeding value of animals and facilitate informed decisions which should help reduce indiscriminate breeding from unsuitable animals. NED will contain verified pedigree and performance information for breeding animals, their ancestors and offspring and will lead to more informed marketing processes. NED will also inform research currently being undertaken to detect genetic defects manifested during training and competition.

ACTION 46: Capitalise upon the data contained in NED

Action : Use information available from NED to: better select animals for breeding, develop a simple system for comparing the breeding values of mares and stallions; collate and market pedigree and performance data; provide data to support the marketing of horses and ponies and work being undertaken to eliminate genetic defects; and make evaluation scores widely known.

Responsibility : New lead bodies to improve breeding (see Action 45).

Priority : Commencing in the short-term with the final outcome being long-term.

(c) Raise standards in studs

8.14 Whilst acknowledging the efficiency of many studs, there is concern that others are working to lower standards, without relevant policies in place and are unable to provide basic elements of record keeping to support their ambitions as studs. The recently introduced Breeders' Quality Mark Scheme offers an opportunity to rectify this situation by setting standards. The breeding industry needs to rally around the scheme and cooperate in its introduction as a common industry standard across all four of the sectors. This is a further opportunity for cooperation between bodies, led by their respective lead bodies.

CASE STUDY - Breeders' Quality Mark Scheme

The British Equestrian Federation, through British Breeding, has introduced a voluntary scheme with the objective of giving added confidence to those breeding and/or purchasing horses and ponies and increasing the marketability of such horses/ponies and semen. This is achieved by recognising and improving the quality of record-keeping and disease and accident prevention on studs. which in turn gives breeders further acknowledgement of their skill and increases the validity of their breeding data. Those studs achieving the standards set are entitled to display the Breeder's Quality Mark on their stationery, in advertising material and as a wall plaque.



To customers the quality mark is proof that the stud has met the standards considered by Federation to be prerequisite for the operation of premises where the health, welfare and reproductive efficiency of the breeding stock are paramount; and where every effort will be made to ensure that the mare/stallion/foal will return home free from disease and injury and that prompt and appropriate veterinary attention will have been sought where necessary.

To studs it means that they have an added marketing tool in that it can be reasonably expected that customers will look more favourably on studs sporting the logo on their stationery and in their advertisements. However, it does come with a cost in that to obtain the Quality Mark studs must reach and maintain the high standards set. These include complying with the appropriate Horserace Betting Levy Board and British Equine Veterinary Association guidelines and the keeping of detailed records for resident and visiting horses and ponies, and, if applicable, the production, handling and shipping of fresh, chilled and frozen semen.

8.15 When a horse or pony succeeds in the competition ring, the rider is acknowledged, the animal's name becomes recognised, and the sponsor also generally receives publicity. However, unlike on the racecourse, rarely are the breeder and trainer acknowledged and the breeding stated. This is disheartening for the breeder, without whose work the others in the chain would not have had their glory. Moreover, quality breeders with only a few mares often have to sell horses as youngsters at relatively low prices, because their business cannot afford to support them until they are old enough to begin serious training and demonstrate their value. Additional incentives are required for breeders, especially smaller ones, so as to retain their expertise and maintain the overall gene pool. The Horserace Betting Levy Board's Breeders' Prizes Scheme for thoroughbreds could provide a model for developing an incentive scheme for the non-thoroughbred sector. Similar schemes are to be found in other countries where cash incentives are paid to, or stud fees paid for, those owners who only have a small number of quality mares which they are prepared to mate with top quality stallions.

CASE STUDY - State Premium Mares

In Germany, Hanover and several other states run a scheme for small breeders, in which top quality mares are awarded the prefix StPrSt (state premium mare) in the front of their name for life. These recognised state premium mares always command a high price when they come on the market.

ACTION 47: Recognition of quality mares

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| <p><u>Action</u> : Determine agreed criteria as to what qualifies a mare (other than racing thoroughbred mares) to be rated 'Premium'. Initiate a Premium Mare Designation. Establish Premium Mare evaluation programmes</p> <p><u>Responsibility</u> : The three proposed non-thoroughbred Lead Bodies acting together.</p> <p><u>Priority</u> : Short-term.</p> |
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ACTION 48: Premiums for quality mares

Action A : Generate sufficient income from British Breeding initiatives and sponsorship to be able to offer premiums to: -
a. British-bred mares and stallions (other than racing thoroughbred mares and stallions) achieving given grading standards;
b. British breeders achieving outstanding success; and
c. success by British-bred horses and ponies in selected competitions.

Action B : Investigate the possibility of national and local tax concessions being introduced for such animals.

Responsibility : British Breeding.

Priority : Short to Medium-term.

(d) Balance genetic improvement with genetic diversity

8.16 The drive for genetic improvement needs to be balanced with maintaining genetic diversity, ensuring the genetic 'fitness' of the national herd and maintaining the gene pool.

CASE STUDY - 2002 UK Country Report on Farm Animal Genetic Resources

This demonstrated that there is a rich diversity of equine genetic resources, and native breeds which make an important contribution to breeding programmes and deliver key biodiversity objectives as well as augmenting regional identity and culture. A National Steering Committee has since been established to inform Government policy and assist in monitoring and managing farm animal genetic resources. As well as producing a National Action Plan, the Committee aims to:

- characterize breeds and promote their benefits and use (for example, the use of native breeds such as Exmoor and New Forest ponies in grazing programmes that deliver other important biodiversity objectives);
- maintain an inventory of pedigree animals in co-operation with breed societies;
- agree conservation priorities with stakeholders, especially for those breeds most at risk such as the Suffolk Punch and Cleveland Bay; and
- improve breeds.

CASE STUDY - Inheritability of disorders

The British Horseracing Board and the Animal Health Trust are conducting work on the inheritability of disorders in the thoroughbred. In time this could be applied to all horses with a view to eradicating certain predispositions (for example broken blood vessels).

(e) Conservation of native and indigenous horses and ponies

8.17 The UK is unique in the fact that it has wide diversity of native horse and pony types that have evolved over the centuries. These animals are native to many areas of the countryside and have developed in response to the areas in which they live and the climatic conditions in which they have had to survive. They are truly part of the national heritage, each native breed having its own stud books which in many cases can trace bloodlines back over the last 100 years. There is a wide ranging market for such animals, both at home and abroad and it is correct to say that no other country in the world has anything to match the British native breeds. They have a large following and their popularity has grown immensely over recent years. With a wide range of competitions now confined purely to native breeds, the market for them has increased. They are now eligible to compete at the highest level with competition finals at major shows, including the Horse of the Year Show and Olympia. The popular in hand breed classes have now been extended to a wide range of performance classes both under saddle and in harness. Native breeds can be suitable for all members of the family and many have the attributes of being hardy, versatile and often easier to keep.

8.18 The consultation process elicited responses indicating that some of the native and indigenous horse and pony breed societies viewed their primary role as being the preservation and survival of the unchanged breed and that breeding, especially in the native pony field is undertaken mainly as a hobby. However, horses and ponies, especially the native breeds are undoubtedly a tourist attraction and, in many areas of England and Wales, are responsible for significant amounts of a region's revenue. The role of horses and ponies in conservation grazing projects is discussed further in Aim 6 and more about their use in tourism projects in Aim 3.

CASE STUDY - Plan to turn Fell Ponies into a tourist attraction

David Anthony Murray, in a report partly sponsored by Defra, stated that 'the rare ponies are in danger of becoming as rare as blue whales or otters' and suggested that visits should be organised to see Fell Ponies in their natural environment. Currently people have to find out for themselves where the ponies are and to make their own way around the Fells.

ACTION 49: Support for native and indigenous breeds

Action : Enter into discussion with Defra, English and Welsh Nature, the Countryside Council for Wales and the English and Wales Tourist Boards regarding their recognising native and indigenous ponies and horses as being an essential part of the process of conserving natural habitats and a valuable asset to the tourist industry.

Responsibility : Lead bodies for native and indigenous horses and ponies.

Priority : Short-term.

(f) Training of young horses

8.19 There can be a wide gap between the potential of the horse produced by the breeder and the capability and performance of the final ridden/driven animal. There is no value in breeding quality horses and ponies unless they are trained to their optimum performance in whatever role they find themselves. Encouragement must be given to those engaged in the training of young horses to enable them to produce horses that perform to the best of their physical ability. This important requirement also demonstrates, yet again, the fundamental link between equine health and welfare and the industry's efforts to realise its full potential.

Resources, Monitoring and Implementation

Next steps

Implementation – The Action plan

Although work is already progressing in a number of areas, full implementation of the Actions in this Strategy will not happen immediately. However, with commitment and coordination from all sectors of the industry, progress will happen. A separate Action Plan is being developed to map out who is responsible for taking things forward, the desired outcome, the current position and the next steps. This plan, which will be published in early 2006, will provide a means by which the effectiveness of this Strategy and implementation progress can be measured. It can be used as a guide over the next year to monitor progress and will form the basis of a progress report, which will be produced in late 2006/early 2007. This Action Plan may change as the industry develops and Actions progress, so the process of review will be important to ensure this Plan evolves along with the industry. Further reports may be produced in subsequent years or at the end of appropriate periods of time.

Resources

Implementation of this Strategy will not come without some costs attached. In order to achieve the joint objectives, all parts of the horse industry will need to continue to invest adequately in the development of the industry, and Government will need to continue to play its part. That investment will only be made by the various parties if there is a firm expectation of a return in the form of a healthier and more sustainable industry, contributing more effectively to the economy, rural communities and employment and a range of other public benefits. This reinforces the need for the Strategy to gain widespread support in order to secure adequate funding for its implementation. The reporting process outlined above will provide a useful means to check on whether sufficient commitment and adequate resources are forthcoming.

ACTION 50: Monitoring of the Strategy

Action : Publish an Action Plan in spring 2006. Produce subsequent reports on progress at suitable stages to monitor the success of the strategy and the development of the horse industry.

Responsibility : BHIC and Defra.

Priority : Short-term.

GOVERNMENT DEPARTMENTS' PUBLIC SERVICE AGREEMENT (PSA) TARGETS

Under the Government's Public Service Performance monitoring arrangements, each Department is required to agree with HM Treasury a number of targets relating to key areas of their policy responsibility. These targets, which are set out in separate Public Service Agreements¹, are designed to represent a step change in the level of quality of a specific service, or an improvement in the lives of people across the UK. PSA targets are priorities for the Departments and significant amounts of public funding are channelled towards their achievement. PSA Targets will be reviewed as part of the Comprehensive Spending Review in 2007.

The Horse Industry has the potential to contribute towards the achievement of many of these PSA targets, and thus to the delivery of better public services and the improvement of the quality of life for all. In return, the industry could benefit from closer engagement with key Government priorities, and thus cement its place in the mainstream of public policy. It is, however, for the industry to make the case for its contribution through constructive engagement underpinned by clear and persuasive evidence.

| Department | PSA Objectives and Targets |
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| <p>Department for Education and Skills</p> <p>Overall Aim: Help build a competitive economy and inclusive society by: creating opportunities for everyone to develop their learning; releasing potential in people to make the most of themselves; achieving excellence in standards of education and levels of skills</p> | <p>Objective I: sustain improvements in primary education.</p> <p>1. Raise standards in English and maths so that:</p> <ul style="list-style-type: none"> • by 2004 85% of 11 year olds achieve level 4 or above and 35% achieve level 5 or above with this level of performance sustained to 2006; and • by 2006, the number of schools in which fewer than 65% of pupils achieve level 4 or above is significantly reduced. <p>Objective II: transform secondary education.</p> <p>2. Raise standards in English, maths, ICT and science in secondary education so that:</p> <ul style="list-style-type: none"> • by 2004 75% of 14 year olds achieve level 5 or above in English, maths and ICT (70% in science) nationally, and by 2007 85% (80% in science); • by 2007, the number of schools where fewer than 60% of 14 year olds achieve level 5 or above is significantly reduced; and • by 2007 90% of pupils reach level 4 in English and maths by age 12. |

¹ All Departmental PSAs are available on the Treasury's website: www.hm-treasury.gov.uk/performance/index.cfm

| Department | PSA Objectives and Targets |
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| | <p>Objective III: pupil inclusion</p> <p>4. Enhance the take-up of sporting opportunities by 5-16 year olds by increasing the percentage of school children who spend a minimum of two hours each week on high quality PE and school sport within and beyond the curriculum from 25% in 2002 to 75% by 2006. Joint Target with DCMS</p> |
| | <p>Objective IV: raise attainment at 14-19.</p> <p>5. Raise standards in schools and colleges so that:</p> <ul style="list-style-type: none"> • between 2002 and 2006 the proportion of those aged 16 who get qualifications equivalent to 5 GCSEs at grades A* to C rises by 2 percentage points each year on average and in all schools at least 20% of pupils achieve this standard by 2004 rising to 25% by 2006; and • the proportion of 19 year olds who achieve this standard rises by 3 percentage points between 2002 and 2004, with a further increase of 3 percentage points by 2006. |
| | <p>Objective V: improve the skills of young people and adults and raise participation and quality in post-16 learning provision.</p> <p>6. By 2004, at least 28% of young people to start a Modern Apprenticeship by age 22.</p> <p>7. By 2010, 90% of young people by age 22 will have participated in a full-time programme fitting them for entry into higher education or skilled employment</p> |
| | <p>Objective VI: tackle the adult skills deficit.</p> <p>10. Improve the basic skill levels of 1.5 million adults between the launch of Skills for Life in 2001 and 2007, with a milestone of 750,000 by 2004.</p> <p>11. Reduce by at least 40% the number of adults in the workforce who lack NVQ 2 or equivalent qualifications by 2010. Working towards this, one million adults in the workforce to achieve level 2 between 2003 and 2006.</p> |

| Department | PSA Objectives and Targets |
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| <p data-bbox="277 274 689 341">Office Of The Deputy Prime Minister</p> <p data-bbox="277 383 757 485">Overall Aim: Thriving, inclusive and sustainable communities in all regions.</p> | <p data-bbox="828 274 1859 331">Objective I: work with the full range of Government Departments and policies to raise the levels of social inclusion, neighbourhood renewal and regional prosperity.</p> <p data-bbox="828 363 1899 453">1. Promote better policy integration nationally, regionally and locally; in particular to work with departments to help them meet their PSA floor targets for neighbourhood renewal and social inclusion.</p> <p data-bbox="828 485 1881 596">2. Make sustainable improvements in the economic performance of all English regions and over the long term reduce the persistent gap in growth rates between the regions, defining measures to improve performance and reporting progress against these measures by 2006. Joint target with HM Treasury and DTI.</p> |
| <p data-bbox="277 609 600 638">Department of Health</p> <p data-bbox="277 679 788 852">Overall Aim: Transform the health and social care system so that it produces faster, fairer services that deliver better health and tackle health inequalities.</p> | <p data-bbox="828 609 1612 635">Objective II: improve health and social care outcomes for everyone.</p> <p data-bbox="828 667 1890 724">6. Reduce substantially the mortality rates from the major killer diseases by 2010: from heart disease by at least 40% in people under 75; from cancer by at least 20% in people under 75.</p> <p data-bbox="828 756 1917 845">7. Improve life outcomes of adults and children with mental health problems through year on year improvements in access to crisis and CAMHS services, and reduce the mortality rate from suicide and undetermined injury by at least 20% by 2010.</p> <p data-bbox="828 877 1877 935">11. By 2010 reduce inequalities in health outcomes by 10% as measured by infant mortality and life expectancy at birth.</p> |

| Department | PSA Objectives and Targets |
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| <p>Home Office</p> <p>Overall Aim: Build a safe, just and tolerant society.</p> | <p>Objective I: reduce crime and the fear of crime, including organised and international crime.</p> <p>1. Reduce crime and the fear of crime; improve performance overall, including by reducing the gap between the highest crime Crime and Disorder Reduction Partnership areas and the best comparable areas; and reduce:</p> <ul style="list-style-type: none"> • vehicle crime by 30% from 1998-99 to 2004; • domestic burglary by 25% from 1998-99 to 2005; • robbery in the ten Street Crime Initiative areas by 14% from 1999-2000 to 2005; maintain that level. Target contributing to Criminal Justice System (CJS) PSA <p>Objective III: deliver effective custodial and community sentences to reduce re-offending and protect the public.</p> <p>5. Protect the public and reduce reoffending by 5%:</p> <ul style="list-style-type: none"> • for young offenders; • for both adults sentenced to imprisonment and adults sentenced to community sentences; and • maintain the current low rate of prisoner escapes, including Category A escapes. • contributing to CJS PSA <p>Objective VI: support strong and active communities in which people of all races and backgrounds are valued and participate on equal terms.</p> <p>8. Increase voluntary and community sector activity, including increasing community participation, by 5% by 2006.</p> |
| <p>Department for Transport</p> <p>Overall Aim: Transport that works for everyone.</p> | <p>5. Reduce the number of people killed or seriously injured in Great Britain in road accidents by 40%, and the number of children killed or seriously injured by 50%, by 2010 compared with the average for 1994-98, tackling the significantly higher incidence in disadvantaged communities.</p> |
| <p>Department of Trade and Industry</p> <p>Overall Aim: Deliver prosperity for all by driving up productivity and competitiveness</p> | <p>Objective IV: successful enterprise and business.</p> <p>6. Help to build an enterprise society in which small firms of all kinds thrive and achieve their potential, with (i) an increase in the number of people considering going into business, (ii) an improvement in the overall productivity of small firms, and (iii) more enterprise in disadvantaged communities.</p> |

| Department | PSA Objectives and Targets |
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| <p>through world class science and innovation, successful enterprise and business, and fair, competitive markets.</p> | <p>7. Make sustainable improvements in the economic performance of all English regions and over the long term reduce the persistent gap in growth rates between the regions, defining measures to improve performance and reporting progress against these measures by 2006. Joint target with ODPM and HM Treasury.</p> |
| <p>Department for Culture, Media and Sport</p> <p>Overall Aim: Improve the quality of life for all through cultural and sporting activities, to support the pursuit of excellence, and champion the tourism, creative and leisure industries.</p> | <p>Objective I: increase participation in culture and sport and develop our sectors.</p> <p>1. Enhance the take-up of sporting opportunities by 5-16 year olds by increasing the percentage of schoolchildren who spend a minimum of two hours each week on high quality PE and school sport within and beyond the curriculum from 25% in 2002 to 75% by 2006. Joint target with DfES</p> <p>2. Increase significantly the take-up of cultural and sporting opportunities by new users aged 20 and above from priority groups.</p> |
| <p>Department for Environment, Food and Rural Affairs</p> <p>Overall Aim: Sustainable development, which means a better quality of life for everyone, now and for generations to come, including:</p> <ul style="list-style-type: none"> • a better environment at home | <p>Objective I: protect and improve the rural, urban, marine and global environment, and lead integration of these with other policies across Government and internationally.</p> <p>3. Care for our natural heritage, make the countryside attractive and enjoyable for all, and preserve biological diversity by: reversing the long-term decline in the number of farmland birds by 2020, as measured annually against underlying trends;</p> <ul style="list-style-type: none"> • bringing into favourable condition by 2010 95% of all nationally important wildlife sites; and • opening up public access to mountain, moor, heath and down and registered common land by the end of 2005. |

| Department | PSA Objectives and Targets |
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| <p>and internationally, and sustainable use of natural resources;</p> <ul style="list-style-type: none"> • economic prosperity through sustainable farming, fishing, food, water and other industries that meet consumers' requirements; and • thriving economies and communities in rural areas and a countryside for all to enjoy. | <p>Objective II: enhance opportunity and tackle social exclusion in rural areas.</p> <p>4. Reduce the gap in productivity between the least well performing quartile of rural areas and the English median by 2006, and improve the accessibility of services for rural people.</p> |



THE THOROUGHBRED
BREEDERS' ASSOCIATION

THE BRITISH HORSERACING BOARD



The British Horse Society
Registered Charity No. 238864