



IRISH HARNESS RACING ASSOCIATION CLG STRATEGIC PLAN 2019 – 2023



October 2018

Table of Contents

1. Introduction	9
1.1 Process of Development of a Strategic Plan	9
2. Overview of Industry in Ireland	11
3. Overview of Irish Harness Racing Association	13
4. Strategic Action Plan	17
5. Public and Stakeholder Consultations	44
5.1 Nationwide Public Consultation Meetings	44
6. Analysis of Consultation findings	48
7. Analysis of Funding Sources for Strategy Implementation	57
7.1 LEADER Programme 2014-2020	57
7.2 The Sports Capital Programme	58
7.3 Dormant Accounts Fund	59
7.4 Failte Ireland – Tourism Investment Strategy Fund	59
7.5 The Department of Agriculture, Food and the Marine, Equine Technical Support & Equine Breeding Scheme	60
7.6 Department of Agriculture – TAMS Scheme	61
8. Social Role of Harness Racing	64
9. Enhancing horse welfare in the industry	66
10. Annual work plan schedule for 2019	68
11. Monitoring and Progress Tracking	69
12. Cost benefit of Industry to Ireland and N. Ireland	72



Department of Agriculture,
Food and the Marine

This report has been funded with financial support from the Department of
Agriculture, Food and the Marine

List of Abbreviations

HSI – Horse Sport Ireland

HRI – Horse Racing Ireland

PMU - Pari-Mutuel Urbain

IHRA - Irish Harness Racing Association

UET - Union of European Trotting

WTA - World Trotting Association

DAFM - Department of Agriculture, Food and the Marine

BHRA - British Harness Racing Association

NISA - Northern Ireland Standardbred Association

Executive Summary

Executive Summary

Introduction

In January 2018, The Irish Harness Racing Association (IHRA) secured the services of an independent Consultancy Team to develop a Five-Year Strategic Plan for the Association.

The preparation of this Plan has been funded by the Department of Agriculture, Food and the Marine (DAFM).

This Five-Year Strategic Plan shall provide direction and strategic focus for the IHRA to establish itself as a strong and credible national representative and development body for the industry.

Background to the Development of a Strategic Plan

The proposal to develop a strategic plan emanated from a comprehensive review of the Industry and subsequent published Report undertaken in 2017.

This Independent Report was commissioned by the Department of Agriculture, Food and the Marine (the Department) to review the Irish Harness Racing sector and prepared by Indecon International Consultants (Indecon).

The report had three key objectives:

- Assess the value of the Harness Racing Sector's contribution to the economic and social life of the country;
- Assess the potential of the Harness Racing Sector, informed by a review of the opportunities; and
- Evaluate the current structure of the IHRA.

There was the assessment of the economic and social contribution of the Harness Racing Sector along with the potential of the sector. In addition, an evaluation of aspects of the structure and governance of the IHRA organisation was undertaken.

The IHRA is now at a stage where a Five-Year Strategic Plan is required.

The Five-Year Strategic Plan shall, at a minimum:

- Define and agree Objectives for Sector;
- Document Programmes and Actions to Realise Objectives;
- Set Annual Targets, both Financial and Operational.

Five Year Strategic Plan Requirements

The Five-Year Strategic Plan draws heavily on the 2017 Independent Review of the sector and addresses fully all Five Recommendations therein covering:

1. Industry Organisation
2. Corporate Governance
3. Strategic Development
4. Funding for expansion of the sector
5. Training for the Sector

The Terms of Reference require the Strategic Plan to include:

- A methodology for completion of the assignment;
- A Stakeholder engagement and consultation strategy nationwide;
- A Gantt chart showing tasks and time allocations per task;
- As part of this process, provision for both the identification and development of key initial board policies as per governance requirements of bodies in receipt of public funding;
- Fully documented strategy section to include vision, strategic objectives and actions;
- A minimum of two planning sessions shall be undertaken with the Board and/or Committees of IHRA;
- A five-year budget with estimates for funding requirements from both public and private sectors;
- Collaboration and co-operation strategy for the organisation across a number of sectors including tourism, education and training, enterprise and potential for funding from other sources, private or the public sector;
- The Strategic Plan shall address organisational capacity building, governance and risk, to include training needs analysis and training schedule for the Board and Committees;
- The final strategic plan document shall be proofed for congruence with any relevant national policies and shall incorporate best practice techniques and guidance as appropriate;
- A cost/benefit analysis exercise shall be carried out on the Five-Year Strategy clearly documenting revenue streams and return on investment ratios for public funding investment in the industry.

The strategy has been developed in consultation with the Board of the IHRA.

Upon the completion of the final document, it will be used annually by the IHRA Board to prepare work plans and budgets and will incorporate both qualitative and quantitative indicators by which the Board and funders shall be able to assess the performance of the organisation and the industry against the targets agreed upon at the outset.

As such it is important that the strategy is a working document. This document has the capacity to lever support for the development of the industry and also a practical and deliverable strategy.

The strategy comprises of a realistic series of actions that will enable Ireland as a country to exploit the untapped potential of this industry from within its shores and beyond.

Interim Report Conclusion

There are two clear areas for consideration within this Strategy Plan

1. Development of a Harness Racing Industry in Ireland
2. Opportunity to tackle the anti-social problem of 'Road-Racing'

What is clear is the interplay between the two.

This Plan will recommend the ongoing commitment and progression of the 'Integration Programme'. However, unless there is supporting infrastructure of stabling and training facilities made available for the successful students, it is highly unlikely the Programme will succeed.

The Integration Programme is relatively cheap to conduct compared to other Urban Horse programmes, provides education to a minority community, many of whom are passionate about the horse and will provide the wider community with the knowledge an anti-social activity is being addressed.

Before the success of this Integration Programme can be measured there is the need for a harness racing industry to be developed. The IHRA during the past five years has proven their ability to identify opportunities both within Ireland and Internationally. They have identified new revenue opportunities and continue to develop.

There are three areas that need to be addressed urgently:

1. Currently there is no full-time staff. The industry cannot progress unless there is the appointment of a Chief Executive Officer with the background and ability to develop a business. A Finance Officer and two support staff is also required.
2. A dedicated harness racetrack. For multiple reasons, the sport cannot progress any further nor generate revenues for the industry unless a suitable racetrack is built.
3. Strengthening of the current IHRA with more Independent Directors (four in total) appointed who have expertise in professional areas and Industry based Directors (six in total) drawn from each of the Industry based Committees. Nine along with the Chairman would make it a Board of ten.

Through the consultation process, key Stakeholders within the industry were unanimous in their view that the most important area that requires development is a dedicated track.

The key recommendation is for this Strategic Plan to be progressively implemented during the next five years. The focus for Year One is to establish an operation foundation including staff and the identification and planning for a racetrack (track, broadcast and minimal facilities) to be developed. With this in place the sport will be able to market its product internationally and drive revenue.

As such it is important that the strategy is a working document. This document has the capacity to lever support for the development of the industry and also a practical and deliverable strategy.

The strategy comprises of a realistic series of actions that will enable Ireland as a country to exploit the untapped potential of this industry from within its shores and beyond.

Six strategic priority areas have been selected through which the Five-Year Strategy will be implemented. All actions included in this strategy (totaling 39) shall fall under one of these operational headings which are:

- Industry Structure and Governance/Finance

- Breeding and Welfare
- Training and Integration
- Infrastructure
- Income Stream Development and Marketing
- Integrity

The focus for Year One is to establish an operation foundation including staff and the identification and planning for a racetrack (track, broadcast and minimal facilities) to be developed. With this in place the sport will be able to market its product internationally and drive revenue.

This strategy represents an opportunity to secure support for the development of a sport with a proven revenue base. This will deliver the opportunity to develop and create infrastructure along with economic growth whilst at the same time assisting in tackling an anti-social issue.



1. Introduction

The Irish Harness Racing Association (IHRA) is the internationally recognised governing body of harness racing in Ireland and is a Member the Union of European Trotting (UET) and World Trotting Association.

The IHRA works closely with the Department of Agriculture, Food and the Marine [in Dublin] (DAFM) to develop the sport both domestically and internationally.

In 2013 the IHRA made a conscious decision to grow the sport in Ireland. During these past five years, there have been many achievements and milestones. After an extensive audit throughout 2015 IHRA earned the right to become an active member of the Union of European Trotting (UET). This membership has meant that IHRA now has an influential position on the global stage with membership on various global committees.

In 2017 the Department of Agriculture funded an Independent Review of the Irish Harness Racing Sector. Five key Recommendations were made including support for the expansion of the sport.

The sport of Harness Racing in Ireland is now positioned for further growth and to offer many economic and social benefits for the Island of Ireland.

1.1 Process of Development of a Strategic Plan

The proposal to develop a strategic plan emanated from a comprehensive review of the industry and report undertaken in 2017.

This independent report was commissioned by the Department of Agriculture, Food and the Marine to review the Irish Harness Racing sector.

The report had three key objectives and was to assess the economic and social contribution of the Harness Racing Sector and the potential of the sector, as well as an evaluation of aspects of the structure and governance of the IHRA organisation. In particular, the review is required to assess the following specific aspects:

- Assess the value of the Harness Racing Sector's contribution to the economic and social life of the country
- Assess the potential of the Harness Racing Sector, informed by a review of the opportunities
- Evaluate the current structure of the IHRA.

A series of recommendations were produced all of which the IHRA have adopted. The IHRA has been working with the Department of Agriculture to implement the recommendations and is now at a stage where a Five-Year strategy is required to move the process forward and to present a proposal that will provide strategic direction to the industry.

The five-year strategy shall:

- Define and agree Objectives for Sector
- Document Programmes and Actions to Realize Objectives
- Set Annual Targets.

This strategic plan has drawn heavily on the 2017 independent review of the sector and addresses fully the recommendations therein covering:

1. Industry Organisation
2. Corporate Governance
3. Strategic Development
4. Funding for expansion of the sector
5. Training for the Sector

Considerable data has already been collected as part of the review as a baseline for the industry and this information has been made available for incorporation into the strategic plan. This Strategic Plan shall provide direction and strategic focus for the Organisation to establish itself as a strong and credible national representative and development body for the industry. The document shall be used to provide a roadmap through a series of actions and objectives for the industry and shall provide the association with a mechanism to stimulate and lever investment from public and private sources to assist in achieving these objectives.

The strategy has been developed in consultation with the Board of the IHRA and key stakeholders in Ireland and Northern Ireland. It is proposed that this document will be used annually by the board to prepare annual work plans and budgets and will incorporate both qualitative and quantitative indicators by which the board and funders shall be able to assess the performance of the organisation and indeed the industry against the targets agreed upon at the outset. From the outset of this process it has been clear that the strategy is to be a working document that not only has the capacity to lever supports for the development of the industry but rather a practical and deliverable strategy comprising of an ambitious, yet realistic, series of actions that will enable Ireland as a country to exploit the untapped potential of this industry within its shores.

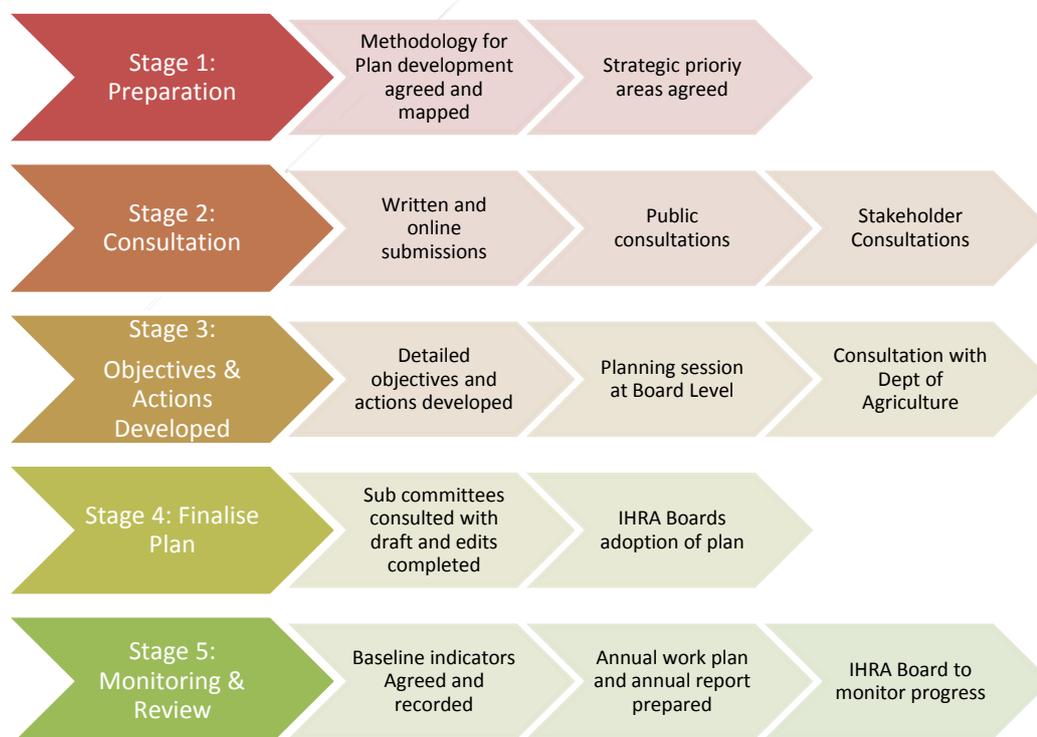


Fig 1.1 Strategy Development Process

2. Overview of Industry in Ireland

Background to Harness Racing

Harness racing is a type of horse racing where horses compete in one particular gait, trot or pace. Pacing can be described as a two-beat gait where the two legs on the same side of the horse move forward together whereas for trotting, the two legs diagonally opposite from each other move forward together. When a horse breaks stride (fails to keep gait), they are slowed down until they resume their stride. Should this fail to occur within a certain distance then the horse will be disqualified from the race. Harness races are primarily conducted with the horse pulling a two-wheel cart known as a sulky. Some trotting races are conducted with a rider.

Harness racing is the most popular racing and betting sport on mainland Europe and in Nordic countries. It also has a strong base in Australia, Canada, New Zealand and the United States – for both racing and breeding.

Harness Racing in Ireland

Many countries around the world focus on either trotting or pacing whilst a number offer both. Ireland has traditionally focused on the pacer but during the past five years has expanded to embrace the trotter. Offering both forms of harness racing delivers additional areas for development including breeding and training.



During the past five years the level of interest and overall activity in Harness Racing in Ireland has grown. These measures are primarily based around two key statistics:

1. The number of races conducted having grown from 45 in 2013 to 430 in 2017
2. Harness racing from Ireland has been exported and wagered internationally.

Within these statistics, the number of trotting races has grown to 177 in 2017 whilst pacing events numbered 253.

Currently there are 383 horses racing in Ireland.

This is made up of
259 Pacers, and
124 Trotteur-Français

There are
160 Owners
110 Trainers
150 Drivers
120 Breeders

In 2014, Ireland joined the 'French Mentoring Programme' which permitted the organisation to purchase subsidised Trotteur-Français horses and receive subsidised prize-money. This has also enabled training in France of Stewards and other Officials and exchange promotional race-meetings between the two countries.

In addition, a Breeding Agreement with France was signed in 2014 for Ireland to breed Trotteur-Français horses that will be recognised under the French Stud Book making these Irish bred horses eligible to race in France.

Europe and Nordic countries are the dominant regions for harness racing. After undergoing an audit in 2015 the IHRA was admitted in 2016 as a member to the Union of European Trotting, a collective of more than twenty nations.

3. Overview of Irish Harness Racing Association

The Irish Harness Racing Association CLG (IHRA) is recognised as the governing body for the harness racing industry in Ireland. The IHRA was incorporated in May 2015 and its members and operational areas encompass Ireland and Northern Ireland.

A Three Club Structure previously administrated the sport for their local region. As per the Recommendations within the Indecon Report, this has been altered so all aspects of operations of harness racing within Ireland is now the responsibility of the IHRA. This change occurred prior to the commencement of the 2018 racing season.

The IHRA Board consists of eight Directors – six from within the sport and two Independent.

Areas of management by the IHRA Board are:

- Finance including Budgets, Audit and Risk Committee [Both Independent Directors are on this Committee]
- Strategic Planning
- Capital Expenditure
- Nominations and Remunerations
- Marketing, PR & Integration
- Welfare and Veterinary [Third-Party Veterinary Chairman with Independent Members]

Three Sub-Committees have been formed to represent specific areas within and to gain stakeholder contributions and involvement. All Committees have at least two IHRA Board Directors and report to the main IHRA Board. These Committees are:

- Breeding Committee
- Racecourse Committee
- Stakeholders Committee

Racetracks in Ireland consist primarily of one key venue located at Portmarnock which has a lease in place until 2021. Most major race-meetings are conducted at this venue. A private racetrack is located in the North at Annaghmore and the Cork region race at a number of grass based private locations. The IHRA does not have its own dedicated track.

Revenue is primarily sourced from

- Owners Entry Fees to race
- Le-Trot Prizemoney subsidy
- Licensing
- Sponsorship
- International Commission for sale of race meeting

There is currently no full-time staff [only Office Casual staff] and much of the work undertaken is performed on a voluntary basis. [An Independent Consultant was engaged in 2015 and their Contract expires in September 2021.](#)

Prizemoney

In 2017, €667.205 was distributed.

This was split:

Pacers €272.595, and

Trotteur-Français €394.610

This was generated from:

- Owner Race Entry Fees €254,370
- Subsidy from Le-Trot €157,845 (exclusively paid to Trotteur-Français races)
- Sponsorship €88,240
- Stakes Races €166,750 (Owners have paid this into a holding account and the money is ring-fenced and can be used directly when the race is conducted)

Across 430 races, this prize money averaged out to €1,551.64 euros

Key achievements of the IHRA to date

IHRA and LeTROT international agreement

The Irish Harness Racing Association signed an agreement with Le Trot in 2014. This agreement allowed the IHRA to breed French Mares in Ireland. The resulting progeny would have the same rights as Foals born in France and would be allowed to race in the lucrative French circuit where there is €220m in prize money offered yearly.

The agreement also allowed the IHRA to buy race horses in France at affordable Prices that where subsidised by Le Trot. This provides very significant opportunities for Irish breeders to breed and sell horses overseas.

IHRA Entry Into UET

The Irish Harness Racing Association gained entry into the UET which is the governing body for Trotting in Europe and has 22 member countries.

This happened after a yearlong monitoring process where the IHRA went through a vigorous audit of all its processes and rules which included,

- Rule Book and implementation
- Stud Book Rules
- Integrity Testing
- Financials
- IHRA Structure

Gaining entry allows the association to take its seat on the UET council and its various committees where we can influence discussions and policy.

Investment

LeTROT have invested approximately €600k towards prize money in Ireland over the last five years. This has allowed the industry to grow and attract new owners. LeTROT estimated contribution towards prize money for 2019 is €225k.

Bill Donovan from the USA is investing €120k towards prize money over three years. This investment is for a specific race meeting held once a year in West Cork.

Allabar Farms (USA) and Hanover Shoefarms (USA) are investing €100k yearly into a specific race meeting held once a year in Dublin.

Integrity Testing

The Irish Harness Racing Association adheres to a zero tolerance with regard to prohibited substances. The organisation has three sampling routes, pre-race sampling and post-race sampling and out of competition sampling.

The IHRA are the first Racing Discipline in Ireland to test for TCO₂. The Irish Harness Racing Association carries out pre-race sampling mainly for C₂O substances. TCO₂ (Milk shaking) is tested for in nearly all racing jurisdictions around the world as it's known as one of the most performing enhancing products available. The IHRA are currently able to test and detect this substance pre-race which can protect the public and enhance the integrity of the races where tested.

These tests are mainly random but with the gathering of data from horses and trainers can allow for more targeted regime where that information allows.

Any horse failing a pre-race sample will be excluded from the race it is entered to and a full screening sample will be taken from the said Horse and sent to an appropriate laboratory for sampling. Where a negative result is obtained no action will be taken and the horse allowed to resume racing. Where a positive result is obtained the connections of the horse will go through the organisations disciplinary process.

For post-race sampling the Irish Harness Racing Association carries out tests on winners and also can carry out radon tests on horses who have participated in a race.

The Irish Harness Racing Association do full screening for prohibited substances and continually update the banned substances list through its sharing of information with other international bodies.

The organisation also carries out unannounced yard inspections where it will carry out out-of-competition sampling. The same process will be followed with regard to tests and results as with the post-race sampling.

It is the Irish Harness Racing intention to run a best in class integrity process through the sharing of information with similar bodies.

The IHRA tests for all international banned substances. Our current integrity testing is of the same level or above all other Horse Authorities within Ireland and has been achieved without outside funding. The IHRA attributes a lot of its achievements to the integrity of its racing product which includes its data.

Testing for cobalt has been initiated in 2018. It is the intention of the organisation to extend the frequency of testing and maintain its independence through credible partners in the veterinary field together with competent laboratories. At present testing is carried out at the races where the highest price money and also has the highest interest by punters is in betting on horses. A 25% sample is currently taken from top tier race meetings. Integrity testing in Harness racing receives no financial support from any source and is delivered to the current high standard entirely from industry led investment.

The IHRA within the next 5 years wish to invest in strengthening integrity within the industry through enhancing procedures and implementation of same, maintaining a credible and independent subcommittee of the organisation with external expertise to add further credibility to the industries integrity. The IHRA have reviewed the recently drafted Greyhound Industry Bill 2018 and would aspire to a similar level of standards in terms of procedures, sanctions and disciplinary actions within its structure to achieve the highest possible standards for the sport. The industry has to date developed its current system with work associated with this being volunteer led on a meagre budget. In order to bring these aspirations to fruition investment will be required to achieve and implement new and improved systems in terms of integrity.

4. Strategic Action Plan

This action plan has been prepared to form the basis for the development of the Harness Racing Industry in Ireland over the next 5 years. The action plan is an ambitious but deliverable proposal, and its implementation with this timeframe is dependent on resources being secured both from government sources and also from the industry. A key challenge for the IHRA Board will be the priming of funding to enable the industry to develop its own income streams to provide a degree of sustainability and capital for investment in further industry development.



The priorities and actions in the plan will be the development following the planning process that has been undertaken with the board, and the consultation process with the industry stakeholders and general-public.

4.1 Mission Statement

The mission statement of the IHRA is;

'To develop a vibrant harness racing industry accessible to all, which promotes participation and racing excellence, the breeding of world class horses whilst maximising returns to its stakeholders.'

The core Values that underpin this strategy are:

- To adopt Best-Practice in Governance meeting all standards for an efficient and vibrant harness racing industry
- To protect the health, safety and welfare of the horses
- To ensure the safety and welfare of racing participants and officials
- To instil confidence in the general-public through the integrity of harness racing

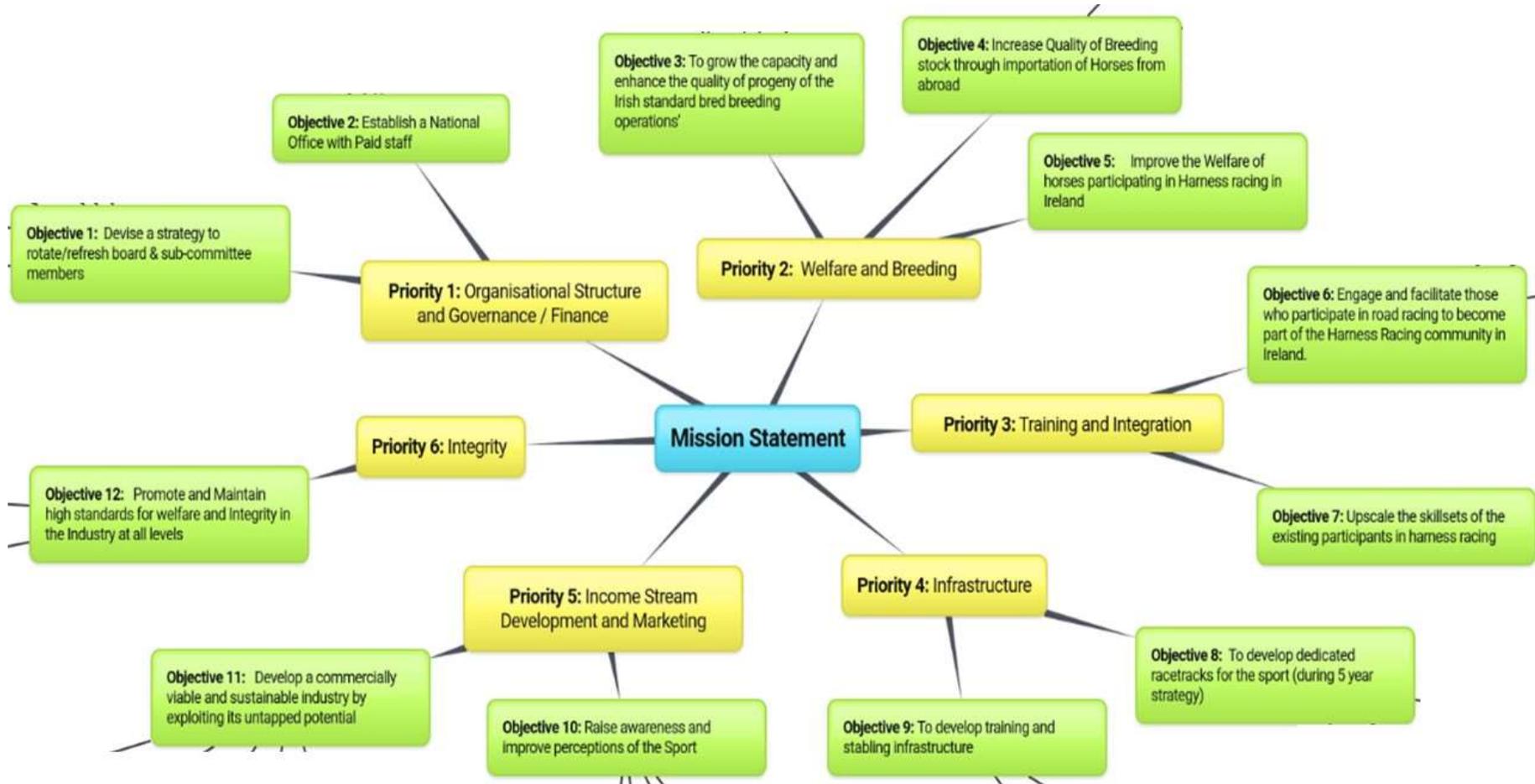
4.2 Strategic Priority Areas

Six strategic priority areas have been selected through which the Five-Year year strategy will be implemented.

All actions included in this strategy shall fall under one of these operational headings which are;

- Industry Structure and Governance/Finance
- Breeding and Welfare
- Training and Integration
- Infrastructure
- Income Stream Development and Marketing
- Integrity

4.3 Structure of the 5 year Strategy



Objectives and Action Templates

PRIORITY 1: Organisational Structure and Governance/Finance

Objective 1: Improve and enhance corporate governance within the organisation

Actions

- 1.1 Devise a strategy to rotate/refresh board & sub-committee members
- 1.2 Adopt and implement operational policies and procedures
- 1.3 Establish and resource an Audit and Risk Committee
- 1.4 Sign up to the Governance Code
- 1.5 Annual Governance Training for Board and Staff
- 1.6 Prepare Induction pack for new board and committee members

Objective 2: Establish a National Office with Paid staff

Actions

- 2.1 Open a National office and recruit a full time CEO for the IHRA
- 2.2 Recruit an office administrator
- 2.3 Provide relevant training and supervision to staff
- 2.4 Conduct annual staff appraisals

PRIORITY 2: Welfare and Breeding

Objective 3: To grow the capacity and enhance the quality of progeny of the Irish standardbred breeding operations'

Actions

- 3.1 Introduce an annual sale of Irish Bred Horses.
- 3.2 Establish Breeders Bonus scheme
- 3.3 Introduce Categorisation for Breeding Stallions and Mares
- 3.4 Develop a Breed improvement programme for Irish Breeders
- 3.5 Provide system of accessible Breed statistics

Objective 4: Increase Quality of Breeding stock through importation of Horses from abroad,

Actions

- 4.1 Organise importation of quality broodmares from overseas annually.
- 4.2 Co-ordinate and subsidise the lease of high quality stallions from overseas.

Objective 5: Improve the Welfare of horses participating in Harness racing in Ireland

Actions

- 5.1 Identification and Registration of all standardbred horses to ensure location and welfare
- 5.2 Welfare of standardbred horse following retirement from racetrack

PRIORITY 3: Training and Integration

Objective 6: Engage and facilitate those who participate in road racing to become part of the Harness Racing community in Ireland.

Actions

- 6.1 Maintain, expand and build on the success of the current integration programme
- 6.2 Facilitate access to horses to race in IHRA approved events
- 6.3 Design and introduce advanced integration training programme including apprenticeships with major stables.



Objective 7: Upscale the skillsets of the existing participants in harness racing

Actions

- 7.1 Develop and launch a series of accredited training modules for drivers, trainers and breeders.
- 7.2 Introduce mentoring programmes
- 7.3 Introduce international expertise to enhance knowledge base through tutorials and seminars

PRIORITY 4: Infrastructure

Objective 8: To develop dedicated racetracks for the sport (during the five-year strategy)

Actions

- 8.1 Develop an international broadcast standard racetrack in greater Dublin area.
- 8.2 Develop a regional broadcast standard racetrack in Cork area
- 8.3 Enhance existing facilities at Annaghmore

Objective 9: To develop training and stabling infrastructure

Actions

- 9.1 Secure and introduce a capital grants scheme for stables and training tracks
- 9.2 Introduce minimum standards for training tracks and stabling



© Copyright Ironia-Art.com

PRIORITY 5: Income Stream Development and Marketing

Objective 10: Raise awareness and improve perceptions of the Sport

Actions

- 10.1 Develop and implement a Communications and PR Strategy
- 10.2 Recruit high profile celebrities/personalities to act as ambassadors for the Sport
- 10.3 Bring the World Trotting Conference to Ireland in 2021
- 10.4 Improve communication channels within the IHRA and with key stakeholders

Objective 11: Develop a commercially viable and sustainable industry by exploiting its untapped potential

Actions

- 11.1 Develop Relationships and credibility with government agencies and Departments and other key stakeholders.
- 11.2 Introduce systematic recording of industry metrics.
- 11.3 Capitalise on income opportunities from the investment in new tracks through broadcast rights and sponsorship
- 11.4 Expansion of horse breeding in both numbers and quality for domestic and international markets.
- 11.5 Introduce levy on existing revenue sources for reinvestment in industry development



PRIORITY 7: Integrity

Objective 12: Promote and Maintain high standards for welfare and Integrity in the Industry at all levels

Actions

- 12.1 Continuously improve testing regime for horses both pre and post-race.
- 12.2 Introduce minimum standards for welfare and veterinary facilities

STRATEGIC PRIORITY AREA 1: Organisational Structure and Governance / Finance					
Objective 1: Improve and enhance corporate governance within the organisation					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
1.1. Devise a strategy to rotate/refresh board & sub-committee members	Staff and Board time to devise and adopt policy change	Maximum term of office of 2 consecutive terms of 3 years. Increase in External independent board members.	Increased capacity of board. Greater transparency and accountability of board members.	2019	Sub committees Stakeholders Board match Ireland.
1.2. Adopt and implement operational policies and procedures	Staff resources, external expertise as required.	Full suite of policies and procedures expected of national bodies prepared adopted by board and implemented.	Risk management introduced to organisation. Clear decision making parameters and accountability limits. Demarcation of Responsibilities at different levels within the organisation.	2019	HRI HSI Funding agencies and Government Departments The Wheel/Pobal.
1.3. Establish and resource an Audit and Risk Committee	Board members time and staff time.	External members recruited to join board members of newly constituted audit and risk committee. Risk Register developed for the organisation. Mechanism for policies and procedures and governance learning to be put into practice and	Greater transparency in decision making. Risks to industry and organisation identified and mitigating factors progressed.	2019	Company Auditors Funders Financial Administrator

		implemented/monitored/scrutinised.			
1.4. Sign up to the Governance Code	Board training, staff time in implementing this best practice model.	Governance code adopted by the organisation as best practice model for improving and on-going monitoring of governance standards at all levels in the organisation..	Culture of high standards in decision making embedded in the organisation at all levels.	2019	Company Auditors Funders Financial Administrator
1.5. Annual Governance Training for Board and Staff	Training needs analysis conducted to identify gaps in capacity of board members annually.	Relevant refresher training conducted regularly with board and staff, new regulations or requirements identified. Review of governance conducted.	High governance standards maintained in the organisation.	Annually	Training provider
1.6. Prepare Induction pack for new board and committee members	Staff and board time.	A comprehensive induction pack and session designed for new board members, in particular for those outside of the organisation and industry.	New board members brought up to speed quickly, roles and responsibilities clear from outset. Difficulties with dereliction of duties or overstepping mark avoided.	2019	External expertise

STRATEGIC PRIORITY AREA 1: Organisational Structure and Governance / Finance					
Objective 2: Establish a National Office with Paid staff					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
2.1. Establish a National office and Recruit a full time CEO for the IHRA	Develop full job description and person specification. Secure finance for the position. Recruit staff member and provide contract of employment. Secure premises and fit out a national office for the organisation.	Full time CEO appointed. National office with staff opened.	Organisational capacity to implement strategic plan enhanced. Current dependency on volunteers to do full time jobs addressed. Permanent office and point of contact established.	2019	Dept of Agriculture, Food and Marine
2.2. Recruit a Finance Officer and Secretary	Develop full job descriptions and person specifications. Secure finance for the positions. Recruit staff members and provide contract of employment.	Full time Finance officer appointed. Full time secretary appointed.	Organisational capacity to implement strategic plan enhanced. Current dependency on volunteers to do full time jobs addressed. Administrative ability to deliver actions introduced and manage public funding.	2019	Dept of Agriculture, Food and Marine
2.3. Provide relevant training and	Funding to provide training to up skill staff in	Tailored and relevant training provided on an on-	Fully functioning and efficient office	Annually	Dept of Agriculture, Food

supervision to staff	skills required to run the organisation.	going basis.	established with competent staff.		and Marine
2.4. Conduct annual staff appraisals	Chairman, Board members and CEO time.	Staff reviews conducted annually in uniform format.	Staff performance monitored and contribution to organisation valued and acknowledged.	Annually	-

STRATEGIC PRIORITY AREA 2: Welfare and Breeding					
Objective 3: To grow the capacity and enhance the quality of progeny of the Irish standard bred breeding operations'					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
3.1. Introduce an annual sale of Irish Bred Horses.	Board and Staff time to organise sale.	Annual sale organised and run in collaboration with Sales yard. Facility.	Increased market outlet for breeders, improved visibility of breed and showcase event of standard bred horses for sale annually. Opportunity for critical mass of horses for sale to attract international buyers.	2019	Cavan Equestrian Centre Goresbridge
3.2. Establish Breeders Bonus scheme	Board policy to be developed and adopted by the organisation. Breeding subcommittee time and consultation process.	Breeders bonus scheme introduced.	Increased incentive for breeders to breed winning horses. Additional income for breeders to reinvest in better breeding stock. New breeders enter market in Ireland and N. Ireland.	2021	-
3.3. Introduce Categorisation for Breeding Stallions and Mares	Breeding committee time commitment, staff time. Analysis of best practice internationally.	System of Categorisation for Breeding Stallions and Mares introduced and administered by IHRA.	Improved breeding statistics available for purchasers. Improved quality of breeding stock in Ireland and N.	2021	Other National Breeding programmes worldwide. Department of Agriculture,

			Ireland.		Food and Marine.
3.4. Develop a Breed improvement programme for Irish Breeders	Breeding committee time commitment, staff time. Analysis of best practice internationally. Funding secured to implement.	Breeding programme for Standard Bred horses introduced.	Improved quality of breeding stock in Ireland and N. Ireland.	2022	Other National Breeding programmes worldwide. Department of Agriculture, Food and Marine
3.5. Provide system of accessible Breed statistics	Breeding committee time commitment, staff time. Analysis of best practice internationally. Sustainable Funding secured to implement.	System for recording statistical data re. breeding developed and rolled out.	Improved quality of breeding stock in Ireland and N. Ireland.	2022	Other National Breeding programmes worldwide.

STRATEGIC PRIORITY AREA 2: Welfare and Breeding					
Objective 4: Increase Quality of Breeding stock through importation of Horses from abroad					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
4.1. Organise importation of quality broodmares from overseas annually.	Delegation visit to studs in France. Staff time.	80 breeding mares imported from France annually.	Increased number of breeding mares. Increased number of foals born in Ireland annually. Improved bloodlines and stock for new breeders available.	Annually	Le Trot
4.2. Co-ordinate and subsidise the lease of high quality stallions from overseas.	Finance to subsidise the lease of quality Stallions	Increased number of full French Stallions standing at stud in Ireland for breeding season.	Improved breeding outcomes through higher value progeny. Trotteur Francais stud book eligible foals.	Annually	Le Trot Standardbred Studs in Ireland and N. Ireland.

STRATEGIC PRIORITY AREA 2: Welfare and Breeding					
Objective 5: Improve the Welfare of horses participating in Harness racing in Ireland					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
5.1..Identification and Registration of all standardbred horses to ensure location and welfare	Ability to co-ordinate existing registrations and matching with known and unknown locations. Support for appropriate personnel to visit locations where standardbreds are located	Accurate registration of horses and known location and ownership trail	Improved welfare of horse (both recognised IHRA stakeholders and illegal sulky-racing) as locations are visited and standards of horse living conditions assessed	First twelve months to establish and on-going welfare inspections	N/A
5.2. Welfare of standardbred horse following retirement from racetrack	Financial, physical and human support for the retraining of standardbred to other equine activities Retirement village for standardbreds	More suitable horses available for other equine sports and public service activities	Providing an opportunity for the horse to have their lives extended in productive and worthwhile areas. Provides additional economic and social benefits	First twelve months to establish and on-going retraining and housing programme	Le Trot Standardbred Studs in Ireland and N. Ireland.

STRATEGIC PRIORITY AREA 3: Training and Integration					
Objective 6: Engage and facilitate those who participate in road racing to become part of the Harness Racing community in Ireland.					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
6.1. Maintain, expand and build on the success of the current integration programme	Funding to extend integration programmes nationwide. Trained Tutors to deliver the programme and facilities to operate from.	Integration programme expanded from 1 per annum to 3 per annum. 45 participants completing programme annually.	Greater numbers of road racers integrated into IHRA and operating within a controlled environment. Reduced incidents on roads, reduced Garda resources to police incidents, referral option for Gardai and courts to direct offenders.	Annually	Gardai Department of Agriculture, Food and Mar Partnership Companies. Local Authorities. Veterinary Council of Ireland
6.2. Facilitate access to horses to race in IHRA approved events	Horses owned or leased from IHRA members for use at approved facilities by new entrants	New entrants particularly youth provided with opportunity to race Standardbred horses on IHRA tracks.	New young people with interest in horses encouraged to become involved in Harness racing. Social outlet for young people from all sections of society to become involved in the sport.	2021	Gardai Department of Agriculture, Food and Mar Partnership Companies. Local Authorities. Horse Owners

					Training Facilities.
6.3. Design and introduce advanced integration training programme including apprenticeships with major stables.	Funding to introduce advanced integration programmes nationwide. Trained Tutors to deliver the programme and facilities to operate from.	Integration advanced programme introduced with 15 participants completing programme annually growing to 30 annually.	Greater numbers of road racers integrated into IHRA and operating within a controlled environment. Reduced incidents on roads, reduced Garda resources to police incidents, referral option for Gardai and courts to direct offenders.	Annually	Gardai Department of Agriculture, Food and Mar Partnership Companies. Local Authorities. Horse Owners Training Facilities. Veterinary Council of Ireland Dept of Education of Skills Le Trot

STRATEGIC PRIORITY AREA 3: Training and Integration					
Objective 7: Upscale the skillsets of the existing participants in harness racing					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
7.1. Develop and launch a series of accredited training modules for drivers, trainers and breeders.	Training modules developed. Tutors approved and courses accredited through IHRA. FETAC/QQI accreditation secured for some courses. Funding to develop and pilot courses.	Training courses and modules developed and rolled out. 30 participants per annum average complete approved training.	Increased capacity of existing breeders, driver and trainers and also new entrants to industry, sharing of best practise and expertise across the industry	2021	QQI/ ETB's/Colleges/Agricultural colleges.
7.2. Introduce mentoring programmes	Experienced breeders, trainers and drivers recruited as mentors and trained in mentoring techniques to maximise impact.	Mentoring programme developed and introduced. 15 participants on average per annum.	Increased capacity of new entrants to industry, sharing of best practise and expertise across the industry.	2021	Le Trot UET
7.3. Introduce international expertise to enhance knowledge base through tutorials and seminar	External experts and funding to bring to Ireland. Tailored programmes and tutorials seminars devised.	International expert brought to Ireland annually, part subsidised by IHRA with contribution from course recipients.	Increased knowledge base for those involved in industry. Best practice from overseas replicated.	2020 and annually thereafter.	International experts UET Le Trot

STRATEGIC PRIORITY AREA 4: Infrastructure					
Objective 8: To develop dedicated racetracks for the sport (during 5 year strategy)					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
8.1. Develop an international broadcast standard racetrack in greater Dublin area.	Site purchased or leased long term in greater Dublin area. Facilities developed to provide for international standard racetrack. Planning permission secured. Funding package	1 no. National Racetrack developed in Greater Dublin Area.	Key facility to provide and unlock income generation potential of industry from overseas betting secured. Visibility and image of industry greatly enhanced.	2020-2022	Fingal County Council NAMA Department of Agriculture, Food and Marine. Funding Agencies.
8.2. Develop a regional broadcast standard racetrack in Cork area	Site purchased or leased long term in Cork area. Facilities developed to provide for broadcast standard racetrack. Funding package to Develop facility. Planning permission.	1 no. National Racetrack developed in County Cork	Key facility to provide and unlock income generation potential of industry from overseas betting secured and focal point for development of the industry and tourism, product near Wild Atlantic Way.	2020-2022	Cork County Council Local Landowners Department of Agriculture, Food and Marine. Funding Agencies.
8.3. Enhance existing facilities at Annaghmore	Audit of facilities at current track undertaken in consultation with	Enhanced services at existing Annaghmore	Key facility to provide and unlock income generation potential of	2020-2022	Department of Agriculture, Environment and Rural

	owner. developed to enhance facilities at current racetrack. package to facility. permission.	Facilities to enhance current Funding Develop Planning	Racetrack.	industry from overseas betting secured and focal point for development of the industry and tourism, product.		Affairs NI LEADER Private track owner
--	---	--	------------	--	--	---

STRATEGIC PRIORITY AREA 4: Infrastructure					
Objective 9: To develop training and stabling infrastructure					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
9.1. Secure and introduce a capital grants scheme for stables and training tracks	Funding package from Government under current round of TAMS or similar.	20 number grant recipients annually for new stables.	Increased capacity of industry to expand and accommodate increased numbers.	2021	Department of Agriculture, Food and Marine. Private Stables Farmers Horse Breeders Existing riding schools.
9.2. Introduce minimum standards for training tracks and stabling	Staff resources and external expertise to develop standards and budget to implement action.	Minimum standards for training tracks and stabling introduced for Standardbreds.	Improved welfare for animals. Efficiencies maximised in capital expenditure.	2020	Department of Agriculture, Food and Marine.

STRATEGIC PRIORITY AREA 5: Income Stream Development and Marketing					
Objective 10: Raise awareness and improve perceptions of the Sport					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
10.1. Develop and implement a Communications and PR Strategy	External expertise to develop Communication and PR strategy. Staff, board and subcommittee time.	Communications and PR strategy developed.	Roadmap for enhancing the image of Harness racing in Ireland established. Mechanism to counter negative publicity stories and to advocate for the industry at large.	2019	HRI HSI
10.2. Recruit high profile celebrities/personalities to act as ambassadors for the Sport	Identification and recruitment of high profile ambassador/s for the industry.	Ambassadors for the sport recruited and programme of engagements and media events organised to showcase the industry,	Improved image for industry, Profile of Harness Racing in Ireland enhanced. Process of image rebuilding initiated.	2020	
10.3. Bring the World Trotting Conference to Ireland in 2021	Staff time to organise this flagship event. Funding to showcase Ireland and N Ireland industry,	World Trotting Conference brought to Ireland in 2021	Profile of Harness Racing in Ireland on World Stage dramatically enhanced. Opportunity to promote positive image in Ireland and show industry potential.	2021	World Trotting Conference.

<p>10.4. Improve communication channels within the IHRA and with key stakeholders</p>	<p>Audit and Risk Committee time, Staff time.</p>	<p>Communications policies developed and implemented for internal and external communications and reviewed regularly.</p>	<p>Improved communications with stakeholders. Board and structures of the organisation effectively communicating board decisions and organisational direct to grass roots membership and stakeholders. Two way communication flow welcomed and streamlined.</p>	<p>2019</p>	
---	---	---	---	-------------	--

STRATEGIC PRIORITY AREA 5: Income Stream Development and Marketing					
Objective 11: Develop a commercially viable and sustainable industry by exploiting its untapped potential					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
11.1. Develop Relationships and credibility with government agencies and Departments and other key stakeholders.	Board and Staff time.	Competency of the IHRA grown and demonstrated to public bodies, high standards of governance maintained at all times.	Respect and trust of public bodies earned by IHRA board, sub committees and staff. Evolution as trusted custodians of public money completed.	2019-2023	Government Agencies and Departments Ireland and Northern Ireland.
11.2. Introduce systematic recording of industry metrics.	Staff time, detailed recording mechanisms and system developed for industry metrics.	Industry Metrics system introduced and resourced.	Baseline and development of industry measurement metrics readily available and value for money demonstrated.	2019	Department of Agriculture, Food and Marine.
11.3. Capitalise on income opportunities from the investment in new tracks through broadcast rights and sponsorship	Staff time, track management development, greater number of race meetings.	New sponsors secured for the sport. Media broadcast rights revenues secured. Commissions on betting revenue increased by xxx% in 5 years. Number of race meetings per annum increased from xxxx to xxx. Turnover at race meetings increased from	New income streams reinvested in further capacity building initiatives and capital investment in training, integrity and race facilities.	2021	-

		xxxx to xxxx. Public attendance at race meeting increase			
11.4. Expansion of horse breeding in both numbers and quality for domestic and international markets.	Financial Incentives for new entrants and quality of breeding stock.	Increase in numbers of breeding mares from xxx to xxx. Increase in export of horses from xxxx to xxxx by 2023.	New income streams reinvested in further breeding stock and in capital investment for breeding. New entrants encouraged to breed. Farmers and other rural dwellers provided with a farm diversification opportunity that is affordable.	2021 – annually.	Farm Organisations HSI Department of Agriculture, Food and the Marine.
11.5. Introduce levy on existing revenue sources for reinvestment in industry development	Board policy introduced to levy prize money.	Levy of 7.5% introduced on prize money for industry development fund. €xxxxxxx – generated annually.	Reinvestment of all stakeholders in the IHRA and in the industry by those benefiting most based on prize money.	2019 onwards	Stakeholders

STRATEGIC PRIORITY AREA 6: Integrity					
Objective 12: Promote and Maintain high standards for welfare and Integrity in the Industry at all levels					
Actions	RESOURCES REQUIRED	EXPECTED OUTPUTS	EXPECTED OUTCOMES	TIMESCALE	LINKAGES
12.1. Continuously improve testing regime for horses both pre and post-race.	Independent Integrity Committee, Budget introduced to pay for greater number of tests.	Testing of xx % of horses participating in races, post and pre-race.	Highest levels of integrity achieved in Harness racing of all equine sports in Ireland and N. Ireland.	2020	Veterinary Council of Ireland Testing Laboratories Department of Agriculture, Food and Marine.
12.2. Introduce minimum standards for welfare and veterinary facilities	Staff time, internal and external expertise. Budget to develop action.	Minimum standards for welfare and veterinary facilities introduced.	Uniform and Improved welfare for horses in the industry. Removal of ambiguity around welfare measures. Introduction of minimum standards for owners and breeders for their horses to race at IHRA facilities and events.	2019-2020	Veterinary Council of Ireland

5. Public and Stakeholder Consultations

A comprehensive public and stakeholder consultation process was undertaken in the period April to July 2018. In excess of 237 people participated during this period through a combination of public meetings, stakeholder meetings on a one to one basis and also through phone contact and an online survey circulated nationwide.

The following section presents a summary of the key findings of the public and stakeholder consultation process.

5.1 Nationwide Public Consultation Meetings

A series of three public meetings were held nationwide and advertised in the national media, targeted advertising also was undertaken within the industry and on social media.

The three meetings were held at locations in counties Cork, Dublin and Tyrone.

Date	Venue	Time	Attendance
12th April 2018	Cohannon Inn, Dungannon, Co. Tyrone	7pm – 9pm	19
13th April 2018	Celtic Ross Hotel, Rosscarbery, Co. Cork	7pm – 9pm	27
14th April 2018	Clayton Hotel, Dublin Airport, Co. Dublin	2pm – 4pm	13

An additional meeting took place to coincide with governance training in Portlaoise and focused primarily on the governance section within the IHRA and actions within the strategic plan. This was attended by IHRA board and subcommittee members.

28th April 2018	Maldron Hotel, Portlaoise, Co. Laois	2pm – 4pm	18
-----------------	---	-----------	----

5.1.1 Breeding / Integrity

The first area covered in the workshops was breeding and maintaining a high standard of integrity in the industry as it develops in Ireland. The following are a summary of the main points made across the public meetings;

- Introduction of Incentives, grants and subsidies to improve accessibility for people to get involved in breeding and boost the industry
- Artificial Insemination, Genetics, Bloodstock imports to improve breeding quality.
- Public Awareness and promotion of the opportunities for farmers considering breeding standardbreds.
- Education of existing breeders to improve genetics, breeding techniques and practice.
- Introduce dedicated Sales to horses in Ireland and N. Ireland.
- Breeders Premiums introduced as a portion of prize money.
- Improved Facilities for Mares, Stallions, improved Grading, Stake Races,
- Opportunities for breeding and exporting both pacers and trotters, especially for farmers with TB or Sports horses.
- Expand Testing, train Inspectors and stewards and resource the implementation of Regulations.



5.1.2 Training and Integration of Road Racing

The area of training stimulated much debate at the consultation workshops and the following is a summary of the key points made;

- Training Centre / Stables
- Racetracks & Facilities
- Educational Programmes and Workshops expanded to other areas nationwide where road racing exists.
- Open days for public / schools to provide familiarisation with general public and remove stigma attached to the sport.
- Network with other horse racing through collaborative training initiatives (national hunt / point to point)
- Bring in expertise from overseas of best practice - International trainers
- Up skilling of existing drivers, breeders and owners.
- Develop a list of approved Trainers nationwide to service the entire country.
- There should be particular focus on Horse welfare in all training courses undertaken.
- Consider Using Academy at the Curragh for certain training
- Run summer Camps which could be platform for new entrants into the sport particularly young people.
- Introduce and fund Apprenticeships for drivers, trainers and breeders and also for stewards.
- More money to attract people
- Provide training in Grading of horses.
- Develop strategic partnership with an Agricultural Colleges to introduce module/s on Harness Racing.

5.1.3 Investment in Infrastructure

Lack of infrastructure was seen as the main impediment to income generation in Harness Racing in Ireland at present. In particular the absence of a stadium that would enable the broadcasting of races across Europe and further afield was highlighted at all three workshops. The following is a summary of priorities identified;

- A national stadium/ 1000m race track facility featured as the priority investment.
- Improved Stabling and Training Facilities at both private and at IHRA training centres nationwide.
- Over the five-year period of this strategy, thee tracks should be prioritised, secure tenure and upgrade Portmarnock, secure a site and build a new track in County Cork and also upgrade the privately owned Annaghmore track facilities in County Tyrone.
- In the short term national or regional tracks could also double as training facilities and also provide livery for owners who do not have stabling facilities. This would support the integration programme participants to own and train their own horses.
- Track facilities need to be Family friendly venues which are not currently the case. Professional image needs to be portrayed for the industry to change public perception. The standard of facilities can start this process.
- Facilities at tracks should with time include;

Integrity/testing facilities, Catering and Restaurant, Complimentary Entertainment, Bars, Bookmakers area, Horse Welfare facilities, Floodlights, Car parking, Stand covered area, Parade ring, Units suitable for Vet or Farrier, changing rooms and shower for drivers including hot water supply and ideally be developed in such a way to be suitable for other uses also to spread overheads and running costs and also to enable the facilities to be viable in the period where the industry is growing toward being able to sustain dedicated tracks.

5.1.4 Marketing and Promotion of the Sport

The image of the sport in Ireland was seen as a limiting factor in making it an acceptable mainstream sport alternative to many members of the general public, in particular its association with road racing. A number of practical suggestions were put forward by stakeholders as to how the image of the industry could be improved;

- Develop working relationship with TV channels, RTE, TV3, TG4, UTV and BBC to showcase the sport and the industry; Include young People, Documentaries, Replay events / races, run adverts, pieces of Harness Racing in other shows (Tourism, heritage or Ear to the ground)
- Erect Signage to tracks / Billboards on motorways, lorries etc. and at Dublin airport and points of entry
- Use print media, Newspapers- Reports / Press Releases / Publish Results of Races, Run Adverts in Irish Field and Farming Papers.
- Increase Social Media presence through employing dedicated person or resource Designated person in particular use; Twitter, Facebook, Instagram and You Tube
- Tourist Sector- place Brochures in hotels, Network with accommodation / caterers
- Capitalise on Agri-tourism and also Wild Atlantic way particularly in West Cork
- Attend and take stands at select Shows and Exhibitions such as Agriculture Shows (Balmoral), National Ploughing Championships, Tullamore Show and RDS
- Ensure good horse welfare is maintained and visible at all times.
- Promote the industry to punters through Bookmakers
- Charity races / charity events
- Run familiarisation trips and Field trips
 - Training facilities
 - Equine therapy
 - Open days for families
- Develop a Marketing and PR strategy
- Improve viability of the sector which will attract people to sector and in turn lever funding
- Consider identities from within the industry overseas and well-known local Celebrities as Ambassadors for the Sport
- VDM Festival
- Run International Harnessing Racing Conferences and events to attract professionals from overseas

6. Analysis of Consultation findings

6.1 Analysis of Consultation Findings and Five Year Strategic Plan Modeling

From the many Stakeholder consultations that have taken place the IHRA Five-Year Strategic Plan makes significant use of discussions that were conducted with HRI & HSI. The information that was gathered on those two occasions will provide IHRA with the means to successfully implement a course of action to establish the IHRA on a solid footing and a strategic vision that will have an ability to deliver real and meaningful results in the short to medium term.

At the very heart and core of the strategy plan is the imperative that an international broadcast standard racetrack with a minimum circumference of 1000m be delivered. Only through a venue of that standard can the IHRA and the industry develop, progress and successfully reach its full potential.

The primary driver of the venture and its business model is to generate incomes through the exporting of pictures to betting operators globally. This can **only** be achieved through a broadcast standard venue.

As was discovered through stakeholder consultations and surveys, all interested parties are 'crying-out' for facilities that will provide a focal point for the industry and enhance the means to grow the number of participants around the country and thereby develop the sport. The Integration Programme is key in achieving this target.

6.2 Horse Racing Ireland and Horse Sport Ireland

As part of the Consultation process, meetings took place with both Horse Racing Ireland (HRI) and Horse Sport Ireland (HSI).

Comparatively, HRI is the closest organisation within Ireland to IHRA. IHRA is an affiliate member of HSI.

In the Five year Strategic Plan these organisations provide the established business models within Ireland to enable IHRA to deliver in areas of:

- Corporate Governance
- Welfare and Integrity
- Relationships and Communication with Stakeholders
- Funding processes and management

In this strategic plan Governance is the most critical area:

- Governance that applies best practice in all facets for the industry's day to day operations
- Its oversight of welfare and integrity
- Engagement with Stakeholders
- Management of finance and funding

Over the course of the past five-years there has been a concerted effort by IHRA to improve Governance from within the industry. There has also been the overriding imperative to improve governance by virtue of the drive for Ireland to take its place on the world stage through its membership with the UET and WTA.

Only through adopting best practice in Governance can the industry maintain this position.

Based on the consultations with both HRI and HSI there emerged for the IHRA a compelling case in terms of governing and managing an entire industry.

Through the Consultations that have occurred it is apparent that a Board of ten would be appropriate.

This should be made up of four Independent Directors with experience within Finance, Law, Corporate Governance, Human Resources whilst four Directors should be appointed from within the existing Member ranks. They should potentially be drawn from existing Sub-Committees.

The choice of Chief Executive Officer (CEO) is another crucial part of this plan. An imperative in this instance is to not get the wrong person. This will be key.

Indecon made it clear the need for staff

'...In particular, it should be noted that the IHRA has no full-time staff, and should be considered more in terms of its potential than its current level of activity...'

At present there are no full-time paid employees.

Of prime consideration will be the appointment of a CEO who must be someone with a background in both business development and has the ability to work with Members and other Stakeholders. The individual must have the capacity and ability to be a good driver of development projects and can fulfil the role of acting as a bridge between Stakeholders and Government. They do not necessarily need to be someone from within the horse sport industries. The salary and remuneration package must be one to attract the right person.

This Strategic Plan acknowledges that the role of the Chairman, the Board and the CEO is pivotal to the success going forward.

Something that was clear during the Member Consultation process is the various regions throughout Ireland want to hold onto their local foundations.

This is a circumstance familiar to HRI. It is the intention of IHRA to accept and embrace a view and adopt a model similar to HRI. The practices of HRI have been observed and are something for IHRA to use as a template in its development of venues built in Ireland and other capital expenditure that will be required.

Another aspect of the HRI operations is its acknowledgement that as the overseer of a betting product there is an advantage to such an industry that must be countered with the responsibility that comes with this.

Prize money is at the heart of the horseracing industry from the ground up. Just as it is for harness racing so too is it for thoroughbreds. HRI manage the distribution of prize money across the industry. It is based on a system where prize money is apportioned each year from the monies on hand.

On that basis, IHRA is striving to achieve a similar distribution.

Prize money sustains this industry and its economic effect is to stimulate rural regions around the country, generating employment and providing activities and purpose within the broader community.

This model works for HRI and will be the same goal being aspired to by IHRA.

If this industry is to continue to develop then without prize money increases there will be little incentive for existing participants to want to continue to commit and this will also significantly reduce IHRA's ability to attract new participants. Furthermore, without additional horses and participants it will be more difficult to successfully promote IHRA races internationally to generate revenue.

HRI General

The HRI model is one that is able to maintain an engagement and unity around the country from the North to the South. It acts as a conduit between all the major stakeholders engaged in the industry. IHRA faces similar challenges to ensure that local communities feel the sport is something they can call their own but equally it is something that everyone can share in.

IHRA, like HRI is the overriding Governing body that administers the sport. Within the regions a united vision is an imperative. Despite the spread of racetracks throughout the Isle of Ireland HRI is able to maintain some semblance of unity.

Public Relations

Finally, the consultations provided an insight into the importance of public relations between the industry and the general public. Interestingly, HRI spoke of the management of perception and the need to dispel any image problem or misconception that can be filtered in to the general public. Be it the 'Sport of Kings' image of thoroughbreds or the 'Traveler/Road Racing' connotation of Harness racing, the importance of communication of message and perception is duly-noted from the HRI consultation and is to be acted upon in this Strategic Plan.

Conclusion

The overriding message of the HRI consultation is Governance. Unless there is good governance then all is lost. The lessons learnt from these consultations are the essence that IHRA is now basing this Five-Year Strategic Plan on.

6.4 Bookmakers

Similar to HRI the development of the IHRA as an organisation will be dependent on income from the betting industry. Bookmakers have potentially an important role to play in the development of Harness Racing in Ireland and Northern Ireland.

Consultation took place through a survey of bookmakers currently involved in Harness Racing. It is estimated that 12-14 or 5-6% of Bookmakers in Ireland and Northern Ireland are involved in the sport. A number of practical suggestions were put forward to encourage greater number of bookmakers to participate at IHRA events and to in turn grow income streams.

Within racing, it was suggested that the current handicap system requires an overhaul. Currently handicaps are assigned to horses based on winning races. The handicaps do influence the outcome of future races once applied as horses start further back to track. It is proposed that a fairer system of handicap allocations is introduced. Currently if a horse wins a very low key or un-competitive race they are assigned a handicap similar to winning the top race in Ireland. This is not helpful in ensuring

a level playing field in that handicap should be relative to the competitive nature of the race meeting. Currently there is no allowance made for the grade of horse beaten.

The matter of integrity is of paramount importance when it comes to betting. Integrity should not only relate to dope testing rather also include a mechanism to police and address instances where drivers hold back horses from reaching their potential at races. It is proposed that stewards together with bookmakers can work together to address this through tailored training of stewards to identify potential breaches and investigate and deal with them accordingly. A drop in odds in addition to other factors can flag warnings that merit further investigation.

The potential for income from broadcasting races overseas exists as the industry develops. The streaming of races into bookmakers worldwide has potential; however added value can be introduced by using the knowledge base of the Bookmaking industry in Ireland to set prices for odds on race meetings as a guide for international bookmakers. It was proposed that a fee should be considered for this service as is the case with HRI.

The issue of odds and prices placed on IHRA race meetings was discussed. It was acknowledged that the odds would appear poor when compared to HRI meetings, however it was noted that the average profile of punters at a Harness Racing meeting was much more informed and prudent than at a HRI meeting, thus the requirement to set prices accordingly. The current situation is that harness racing does not draw heavily from the broader population or cohort of occasional punters as is the case with HRI with the related greater chance of losing their money.

6.5 Farming Community

All of the main farm organisations were approached at National level and invited to attend the public consultation events. Small numbers did attend some of the meetings however the level of engagement at a national level was minimal. Potential has however been identified particularly in breeding and expansion of the standardbred breeding programme in Ireland.

There are a large number of small farm equine operations breeding between 1 and 10 horses. The potential exists for many of these breeders who predominantly breed sports horses to expand their operations. They may start to breed standardbred horses to provide greater market returns. It also presents an opportunity for small farmers who have some experience and interest in horses to diversify their current farming income and generate new income streams.

The image of the harness racing industry nationwide is however an impediment to the potential for co-operation with some members of the farming community and their organisations at national level to engage fully.

6.6 Current Reality

A non-negotiable outcome of any future objective is based upon a current reality that the industry does not have its own international broadcast standard racing venue.

Subject to meeting international standards (track, media, racing integrity) Irish harness racing content can be sold on a regular basis and provide income from overseas.

Through a minimum international standard venue racing is conducted and that racing can be sold to wagering operations around the world. Revenues generated through betting commissions can then be placed back into the sport. That source of activity has the capacity to incentivise and deliver a growth in horse numbers through importing and breeding initiatives.

A venue is a hub and a focal point from which an industry is built.

Financially, the industry can operate but it cannot grow. It can use Dundalk for PMU race meetings however; the terms and conditions with which those meetings are conducted mean there is no profit or money being made. These meetings struggle to break-even despite the commissions earned.

The VDM can continue however as things stand it can only be sustained as it is. To deny the sport the opportunity to continue to develop this internationally recognised race meeting is to deny the work that has gone into the past six years and to stifle the momentum in play and thwart the very real potential on display. These points are symbolic and symptomatic of the industry as a whole as it stands today.

6.7 Integration of Road Racing

Recommendation 5 of the Indecon Report States:

'...TRAINING FOR SECTOR:

Indecon recommends that the pilot integration programme implemented should continue. The IHRA in conjunction with the Department of Agriculture, Food and the Marine should continue with the integration programme which was successfully implemented on a pilot basis. This should be subjected to periodic review. Effects should also be made to encourage past-programme participants to engage in the sport...'

The Irish harness racing industry is all too aware of the serious anti-social issue that has been present in Ireland for a number of years relating to incidences of illegal road-racing using a sulky. This activity is frequently associated with official harness racing conducted through the IHRA.

IHRA has always condemned this illegal activity.

Unfortunately, it has resulted in harness racing facing a significant image problem.

Illegal road-racing is most prevalent in Ireland and to a lesser extent the UK however it is not an on-going problem in mainland Europe. This can be attributed to having a well-established and professionally run trotting industry.

To help address this issue, the IHRA in conjunction with DAFM proposed and developed a horse appreciation and education programme. This trial programme was given Government funding and conducted in 2016. The purpose of this initiative was to offer a horse and welfare education programme to those who are 'road-racing'. It has been titled as the 'Integration Programme'.

The pilot programme was successful, however in its post-analysis IHRA reported that to achieve its goal and be sustainable over the long term appropriate facilities and infrastructure would be required. A second programme has been conducted in 2018 following a Tender process. IHRA chose not submit a tender as it realised that if infrastructure and a follow-up programme were not in place there was the potential of wasting public funds.

IHRA made the following observations:

1. This integration process will be generational and require a progressive change within the Traveller Community
2. Unless there is an appropriate follow-up programme in place, there will be limited benefit in pursuing the scheme.

When reviewing the Integration programme, Indecon noted:

'...What became most apparent during the exercise was the realisation that for the project to be sustainable over the long term then appropriate facilities and infrastructure are necessary...'

This point was reinforced when a number of graduates from the first programme expressed their frustration of having successfully completed the course there were no facilities available for them to continue and apply what they had learned. This meant there was no opportunity for these graduates to buy, stable and train a horse.

Importantly, Indecon concluded:

'...Effects should also be made to encourage past-programme participants to engage in the sport...'

The Integration Programme is something the IHRA considers to be a core feature of this Strategic Plan. IHRA believes it is something that can serve the Government, the Traveller Community and the industry itself through an increase in participants.

Recommendation 5 of the Indecon Report States:

*'...TRAINING FOR SECTOR:
Indecon recommends that the pilot integration programme implemented should continue. The IHRA in conjunction with the Department of Agriculture, Food and the Marine should continue with the integration programme which was successfully implemented on a pilot basis. This should be subjected to periodic review. Effects should also be made to encourage past-programme participants to engage in the sport...'*

The Irish harness racing industry is all too aware of the serious anti-social issue that has been present in Ireland for a number of years relating to incidences of illegal road-racing using a sulky. This activity is frequently associated with official harness racing conducted through the IHRA.

IHRA has always condemned this illegal activity.

Unfortunately, it has resulted in harness racing facing a significant image problem.

Illegal road-racing is most prevalent in Ireland and to a lesser extent the UK however it is not an on-going problem in mainland Europe. This can be attributed to having a well-established and professionally run trotting industry.

To help address this issue, the IHRA in conjunction with DAFM proposed and developed a horse appreciation and education programme. This trial programme was given Government funding and conducted in 2016. The purpose of this initiative was to offer a horse and welfare education programme to those who are 'road-racing'. It has been titled as the 'Integration Programme'.

The pilot programme was successful, however in its post-analysis IHRA reported that to achieve its goal and be sustainable over the long term appropriate facilities and infrastructure would be required. A second programme has been conducted in 2018 following a Tender process. IHRA did not Tender as it realised that if infrastructure and a follow-up programme were not in place there was the potential of wasting public funds.

IHRA made the following observations:

1. This integration process will be generational and require a progressive change within the Traveller Community
2. Unless there is an appropriate follow-up programme in place, there will be little point in pursuing the scheme.

When reviewing the Integration programme, Indecon noted:

'...What became most apparent during the exercise was the realisation that for the project to be sustainable over the long term then appropriate facilities and infrastructure are necessary...'

This point was reinforced when a number of graduates from the first programme expressed their frustration of having successfully completed the course there were no facilities available for them to continue and apply what they had learned. This meant there was no opportunity for these graduates to buy, stable and train a horse.

Importantly, Indecon concluded:

'...Effects should also be made to encourage past-programme participants to engage in the sport...'

The Integration Programme is something the IHRA considers to be a core feature of this Strategic Plan. IHRA believes it is something that can serve the Government, the Traveller Community and the industry itself through an increase in participants.

IHRA wants a successful Integration programme to encourage people to learn about the horse, receive practical training and be integrated into harness racing and the IHRA Community.

Unless appropriate training and racetrack facilities are in place, this education and Integration programme will fail to achieve its key objective and purpose.

The 2018 Integration Programme is currently facing the same issues the IHRA Pilot Programme faced in 2016 – a clear lack of direction once the Programme is complete.

IHRA has always argued that the education and initial training is only the beginning. True success can only occur if the correct follow-up programme and infrastructure is in place. IHRA knows that it is pointless handing over funds if they do not deliver on the targets being set in this programme.

Unless there is a racing venue and supporting training facilities then the Integration Programme cannot succeed and be all that it needs to be.

The Integration Programme in 2018 was conducted with limited involvement of the IHRA. As part of the consultation process with the Course Moderator and IHRA Veterinary and Integrity Chairman reported the following findings:

- Using the same curriculum as 2016, fifteen participants from the Traveller community were selected and provided with training in horse welfare

- Race meeting attendance occurred with engagement of industry participants
- The course was conducted at the property of the industry Vet and, again, the limitations of not having appropriate facilities became apparent
- Furthermore, upon the conclusion of this second course it was clear that the Integration Programme is more than just addressing the issue of road racing and those that partake in this activity
- Any future course will need a new remit and wording and a framework with appropriate facilities.

To take full effect there is the need for the programme to be conducted over ten locations across the country. Ultimately what is required is regulation of the entire process.

The Course Moderator believes that if 100 individuals participate in this course then others will follow.

From successfully completing the course, the next phase is acquiring a horse, having facilities to stable, train and then race. This is then moving participants from the realm of the amateur toward that of being a professional and fully integrated into the IHRA.

Following this structure means the IHRA:

- conducts the course
- manages the participant as they strive to move from amateur to professional status
- integrates them into the IHRA.

It is also recommended at the conclusion of the Integration Programme and through the IHRA, participants are offered apprenticeships and/or stable experience with the industry's leading stables to assist and help compliment the integration process.

In terms of outlay for Government support of the IHRA Integration Programme going forward, it should be highlighted that the Irish Government has previously supported a number of urban horse projects that involved, in the case of one project, an allocation of €2.25 million. This is in contrast to the relatively low cost of the IHRA pilot programme of (around €22,000) of 2016 which was entrusted to IHRA by the Department.

The Indecon Report indicated that:

'...The relatively low cost of the programme (€22,000) is notable compared to the scale of capital and other funding given for other urban horse projects...'

As with the need for a racetrack, so too for the Integration Programme, infrastructure matters must be addressed in the first. The course on offer through the Integration Programme itself is sound and the capacity for the industry to assist the community is immense; it is once again about overcoming the limitations of infrastructure to achieve another positive outcome.

Whilst generational, it will act as a means toward solving the Traveller 'road-racing' problem. There will be the opportunity for an education programme to a minority within the community. In turn, revenue and economic benefits will flow from horse acquisitions and the associated benefits from owning and racing a horse. This will mean additional revenue to the IHRA. There would also be additional learning through an apprenticeship and stable education. And, most importantly they would be integrated into harness racing and IHRA.

The cost is three-fold:

- The Integration Programme Course
- Subsidies for acquisition of the horse to train and race
- Infrastructure in the form of stables and training tracks.



7. Analysis of Funding Sources for Strategy Implementation

Core funding similar to that provided to the HRI and HSI is required from central government sources together with industry derived investment for implementation of this strategy. This at a minimum will be required to cover administrative and organisational operational costs. Significant investment will be required from the industry and in particular the private sector to support any state investment. A comprehensive review has been undertaken as part of this process to assess other complementary funding sources that have the potential to support this strategy's implementation. The following is a summary of our findings of the most probable sources of funding from other public sources.

7.1 LEADER Programme 2014-2020

In Ireland, under the LEADER Programme for 2014-2020, a budget of €250 million in grant aid has been provided to support rural communities and local businesses. The bulk of this funding is for capital investment.

As programme manager, the Department of Rural and Community Development is responsible for managing the LEADER Programme.

The LEADER Programme is administered at a local level by 29 Local Action Groups (LAGs) who operate on administrative or county boundaries and are made up of local representatives from the community, public and private sector.

Each LAG is responsible for selecting and awarding LEADER funding to projects within their geographical area. A project must be aligned with the priorities of the Local Development Strategy (LDS). The LDS is a 5 year plan that was developed by the LAG, in conjunction with the rural community, to support the sustainable development of the area. Grant aid is provided to projects under the following priorities/themes:

Theme 1	Theme 2	Theme 3
Economic Development, Enterprise Development and Job Creation	Social Inclusion	Rural Environment
Rural Tourism Enterprise Development Rural Towns Broadband	Basic Services targeted at hard to reach communities Rural Youth	Protection and sustainable use of water resources Local Biodiversity Renewable energy

Funding for Race and Sports horse industry was ineligible under the programme when it was launched. A circular however was introduced in autumn 2017 allowing funding for certain types of equine activity.

Ancillary activities for the provision of services to the race and sport horse industries can therefore be funded and include infrastructure, this infrastructure must be primarily for public use, regardless of whether a fee is charged or not, and the infrastructure must be in keeping with the Local Development Strategy. The LAG must satisfy itself, prior to approval that the infrastructure is primarily intended for public use e.g. it is tourism related or it has secured commercial planning permission.

The Leader group must require annual confirmation from the promoter that the facility is being used for the intended purpose – this may include a register of public users, annual accounts showing income from external users or advertisement/publicity that demonstrates the public use of the facility. The Department will perform ex-post checks to verify adherence with this requirement.

Examples of Ancillary activities that can be funded;

Equestrian Centre/ Riding school/Livery yard capital projects

Measures that further promote rural tourism such as agricultural shows and other events

Measures that enhance access to bridle ways on public and private lands.

Potential to lever for elements of IHRA Strategy

Funding is potentially available for both the IHRA and its members nationwide who reside in rural areas. The maximum aid available is €200,000 over any 3 year period and the maximum % aid is 50%. The measures that could be suitable for Harness Racing infrastructure are Rural Tourism, Business Development and also the Basic Services Measure. The programme has been open 2 years and some measures are already fully committed in some counties however at the time of preparation of this strategy almost all counties had monies in their business creation measure. As no private facilities are open to the general-public can be funded this will however limit the opportunities for private training and livery facilities. Funding could also be levered to carry out feasibility studies under the Analysis and Development measure, the rate of aid for which is 75%. The Portmarnock Raceway received an allocation of funding from Fingal LEADER in 2014 so precedence exists.

7.2 The Sports Capital Programme

The Sports Capital Programme (SCP) is operated by the Department of Transport, Tourism and Sport and provides grants to assist in the development or refurbishment of sports facilities and the provision of sports equipment.

The Programme aims to foster an integrated and planned approach to developing sports and physical recreation facilities throughout the country. In particular, its stated objectives are to:

☑ Assist voluntary and community organisations, national governing bodies (NGBs) of sport, local authorities and Education and Training Boards and schools to develop high quality, accessible, safe, well-designed, sustainable facilities in appropriate locations and to provide appropriate equipment to help maximise participation in sport and physical recreation.

- Prioritise the needs of disadvantaged areas in the provision of sports facilities.
- Encourage the sharing of local, regional and national sports facilities by clubs, community organisations and national governing bodies of sport.

Grants are available to sports clubs, voluntary and community groups, and national governing bodies of sport and local authorities.

The scheme opens periodically usually every 14 to 18 months and the budget nationally in 2017 was €60million.

Allocations vary from county to County and rates of up to 95% are available. Average allocations are generally less than €100,000 per project all of which are capital in nature. The scheme allows for funding of up to €150,000 for local projects and up to €200,000 for projects of National or Regional significance.

Potential to lever for elements of IHRA Strategy

The 2017 guidelines included a category 'Any other capital projects that are clearly sporting in nature and that will increase participation in sport or improve performance'. Some projects of the IHRA as the National Governing body for the Harness Racing Sport have the potential to fit into this category; however applications must be community based as any applications that are private in nature are deemed strictly ineligible. We have been unable to identify any application ever being made by any member or group associated with supporting the development of the sport in Ireland. It is anticipated that the next call for applications will happen before the end of 2018.

7.3 Dormant Accounts Fund

The Dormant Accounts Fund (DAF) was established by legislation and enables unclaimed funds from accounts in credit institutions in Ireland to be used to support:

- the personal and social development of persons who are economically or socially disadvantaged
- the educational development of persons who are educationally disadvantaged
- persons with a disability (within the meaning of the Equal Status Act 2000)

Under the Dormant Accounts Act 2012, the Minister for Rural and Community Development is responsible for the processes by which Government approves measures and projects to which funding may be disbursed under DAF.

The Department of Rural and Community Development is required to prepare a three year DAF Disbursement Scheme that sets out the measures to be implemented under the Fund, and an annual Action Plan to give effect to the scheme.

Pobal currently administers the following DAF funding measures that form part of the 2016 Action Plan. Allocations under this scheme are up to 80% and €100,000 primarily for equipment and projects of a capital nature.

Potential to lever for elements of IHRA Strategy

The funding under this scheme is divided into a number of different categories. The IHRA as a CLG company which is registered with the Charities Regulatory authority is potentially eligible under this scheme. The Social Enterprise measures aim is to provide capital and capacity building funding to social enterprises that provide services to, or employment opportunities for, disadvantaged people, particularly in rural areas. Pobal administers this measure on behalf of the Department of Rural and Community Development. Some of the work the IHRA wishes to progress in relation to the expansion of the integration programme and in particular the provision of fixed facilities to carry out this work with disadvantaged young people has potential to fit under this measure. The measure is currently closed and the last call for applications was in 2017. No date for a new call for applications was available at time of development of this strategy.

7.4 Fáilte Ireland – Tourism Investment Strategy Fund

To stimulate innovation and improve international competitiveness, Fáilte Ireland has launched a significant new Tourism Investment Strategy, entitled Tourism Development and Innovation: A Strategy for Investment 2016-2022. This is funded by the Irish Government's Capital Investment Plan 2016 to 2022, which provides for an Exchequer allocation of €125,705,000 to capital spending on the Tourism Product. The objectives of this strategy are:

- To successfully and consistently deliver a world class visitor experience;

- To support a tourism sector that is profitable and achieves sustainable levels of growth and delivers jobs
- To facilitate communities to play an enhanced role in developing tourism in their locality, thereby
- Strengthening and enriching local communities; and
- To recognise, value and enhance Ireland's natural environment as the cornerstone of Irish tourism.

The Investment Strategy fund has two primary schemes of interest. The Grant Scheme for Large Tourism Projects and the Small Grants Scheme. The Large Tourism Projects Scheme can provide funding of up to €5million for projects of national significance and the rate of aid is up to 75%.

Projects must demonstrate;

- Increasing visitor spend
- Creation of employment opportunities in tourism and hospitality
- Leveraging public and private sector investment in the visitor experience
- Stimulating international awareness and demand:
- Financial sustainability

The small grants scheme allows for allocations of up to €200,000 at the 75% rate of aid.

Potential to lever for elements of IHRA Strategy

The IHRA and private investors in the industry are potentially eligible for these schemes. While no investments have been made in Harness Racing under this scheme or its predecessor there are examples that have been identified nationwide of large investments being made by Failte Ireland in the Sports Horse industry. Harness Racing has very significant potential to broaden and diversify the current tourism product offering in Ireland and Northern Ireland; therefore it is clear that opportunities for aid exist through Failte Ireland. In particular there is potential to capitalise of the concentration of Harness Racing in the West Cork are along the Wild Atlantic way and also in adding value and tourism product the Ireland Hidden Heartland marketing campaign.

7.5 The Department of Agriculture, Food and the Marine, Equine Technical Support & Equine Breeding Scheme

The Department of Agriculture, Food and the Marine, operates a scheme to support improvements in equine breeding schemes and systems in the non-thoroughbred horse sector and for training, education, health and promotion initiatives/projects in the thoroughbred and non-thoroughbred sectors in the State as described below.

The funding is available for:

- (a) Work on the formulation of genetic indices for stallions, blood/hair/tissue sampling/DNA testing to verify pedigree, up-grading of equine registration systems and for the promotion and marketing of non-thoroughbred horses;
- (b) Initiatives in the areas of education, training and promotion in respect of equine health and husbandry, stud management and safety, nutrition and quality breeding;
- (c) Research into equine diseases and breeding and the capital cost of buildings and equipment to facilitate the delivery of enhanced diagnostic and ancillary services;

(d) Data collection and analysis leading to the generation of information to underpin improvements in the genetic quality in the non-thoroughbred sector and education/ training opportunities to satisfy the needs of new entrants and those already involved in the equine and related industries.

In accordance with EU Commission regulations, aid for projects may be granted up to the following maximum levels:

- Genetic Indexing 70%
- DNA testing to verify pedigree up to 70%
- Studbook Establishment and Development up to 100%
- Marketing and Promotion up to 100%
- Performance Testing up to 70%
- Education and Training up to 100%

Potential to lever for elements of IHRA Strategy

A number of actions in the IHRA strategy clearly fit the criteria under this scheme and an application should be prioritised under the current programme which is open for applications.

7.6 Department of Agriculture – TAMS Scheme

The Department of Agriculture currently operates a farm based capital investment scheme ‘Targeted Agricultural Measures Scheme’. TAMS aims to provide farmers with grant aid to improve and/or build a specific range of farm buildings or purchase equipment that may benefit their farm businesses. Previous EU co financed Rural Development Programmes for Ireland included measures specifically to support the development of investments for equine. The current TAMS scheme has been expanded to include Poultry and Pig Sectors however Equine is not currently eligible.

Potential to lever for elements of IHRA Strategy

As no equine scheme has been opened under TAMS there is no potential for support at present. Should this change in the future an opportunity may arise for a proportion of breeders as they would need to be classified as farmers to be eligible for support. Non farmers are not eligible for support under TAMS.

7.7 Northern Ireland

It is envisaged that funding could potentially be secured from government Departments in Northern Ireland most notably from the Department for Communities and the Department of Agriculture, Environment and Rural Affairs. For the duration of this strategies development no NI Executive has been in place and therefore it was not possible to open conversations in this regard. It is however envisaged that government support could be levered in the future as the sport evolves.

Summary of Findings

A number of capital investment funding possibilities have been identified all of which will require a match funding requirement. Applications to these funds can only be progressed at a stage when

sites have been secured by either purchase or long term lease and when the appropriate permissions and individual business cases and match funding has been secured.

No alternative sources of funding have been identified from any government Department, Agency or source to provide support for the core operational costs of establishment and the operation of a national governing body for Harness Racing in Ireland.

7.8 Industry Derived Income streams

Revenue opportunities currently exist and are available to support the development of the industry. At present due to the relatively underdeveloped infrastructure many of these income streams are underdeveloped but could however be improved over time with the necessary investment. Many of these income streams are comparable to HRI and HSI.

These are:

- Owner Contributions to Prize money
- Sponsorship
- Licensing
- International Sales of Pictures and Betting (i.e. Media Rights)
- Sundry Revenues such as Stud Book, foals, Stake money

In addition, IHRA receives

- French Prize money Subsidy

A. Owner Contributions

Entry Fees for Races

The vast majority of this revenue is returned as prize money, almost 100%.

For HRI, this contribution (and they do include Sponsorship monies) is 35%.

B. French Prizemoney Subsidy

The distribution of monies received by IHRA from Le-Trot is distributed 100% as prize money.

The amount received is calculated on overall prize money per race.

For example, if owners' contributions are €1,000, the subsidy would be €400 and Total prize money for the race is €1,400.

C. Sponsorship

Currently, in the region of €90,000 is received from Sponsorship arrangements annually. This has potential to grow if an international standard track is developed and international broadcasting of races.

100% of these monies are paid in prize money.

D. Licensing

Income is received for registrations from Owners, Trainers and Drivers along with participating Members.

This money is effectively used for the operation of the organisation and covers costs only.

For HRI, this amounts to approximately 2.5% of total income.

E. International Sales of Pictures and Betting (i.e. Media Rights)

At present, the IHRA has only one meeting per year broadcast and wagered on internationally.

This is the PMU Meeting from Dundalk.

Revenue received from this meeting has amounted to approximately €22.000 in commissions. As previously noted, due to having to rent a stadium of an international level, this meeting currently runs at a loss.

For 2019 it is projected one meeting will be allocated to Ireland, so revenue forecast will again be in the region of €22.000.

Race Meetings have been trialed into Australia and commissions received were approximately €3.500. Again, only meetings conducted at an international standard venue with media facilities can be considered for broadcast and wagering. Australian wagering companies have stated they will take harness racing from Ireland going forward.

The promoting and selling of Media Rights and identification of betting opportunities is a specialist area.

Sales made on behalf of IHRA will be for both fixed-odds and tote betting.

Revenues received will be by way of

- A percentage of revenue
- Fixed payment per meeting, or
- Gross Gaming Yield share

The IHRA has been advised that until a track at international standard is made available with appropriate media broadcast facilities it will be impossible to sell harness racing from Ireland internationally.

In addition, there are multiple opportunities across many territories where betting operators are seeking additional live content and once the infrastructure is in place, formal approaches to these companies can then take place.

F. Sundry Revenues such as Stud Book, Foals Registrations, Stake money Entry Fees

Whilst there is income from the areas of Stud Book maintenance and Foal Registrations, the cost of administration means this operation is income neutral.

Stake money Entry Fees are monies received for future races. Connections pay in a certain amount to the overall 'pot' that will go toward the prize money of the race at a future date. These monies stand separate to the funds directed toward day-to-day operations of the IHRA. This money must be ring-fenced and cannot be included or identified as income.

Conclusion

IHRA has limited opportunities for increasing its revenue base currently due to lack of infrastructure and resources to pay a fully functional office, however with government support to prime the development of the incomes streams outlined above, a degree of sustainability can be developed for the industry.

8. Social Role of Harness Racing

The Promotion of Harness Racing Participation among Unregulated and Unlawful Sulky Racers is a key policy objective of the IHRA as is tackling other related anti-Social Behaviour around horses.

The IHRA has commenced and will continue in assisting to develop and promote social benefits surrounding horse-care and welfare issues associated with horses in urban regions and areas where there is currently unregulated sulky driving and racing.

Going forward the current Integration Course which receives state funding which needs rebranding should be made available to the following groups of participants;

- People who currently engaged in illegal road racing.
- The Traveling community
- People who have no access to mainstream Trotting, they may keep a pony in local housing estates.

It is acknowledge there is a requirement for a properly resourced marketing/recruitment policy for course participants that give everyone from the above background a fair chance of getting a place on the course.

When participants successfully complete Part 1 training, they then move into mainstream Trotting. Training centres are integral part of integrating participants; it allows them to have a place to stable their horse, to train their horse, to continue their training.

IN order for this to work consideration should be given to ensuring horses and Equipment to be subsidised to enable full engagement, remembering these people will come from a background with limited funds. Twenty Five Percent of all training centres under the control of the IHRA should be made available to integration participants. There should be a qualified trainer available on site where each participant will continue his/her training once a week.

When participants are at a certain standard where they can compete in an Amateur race, not open to professional drivers this should be provided. One or two races should be made available on all race cards to accommodate these drivers. Each week the trainer should go through the performance of each participant's race to improve performance. They should also provide advice on feeding, shoeing and equipment for the horse.

The Board of IHRA propose that the newly branded and broadened 'integration' programme come under the guidance of the Veterinary, Welfare and Integrity Committee (VWC). Those responsible for this operation will report directly to the VWC who in turn will report to the IHRA Board. Areas going forward that will form part of the overall administration and structure of the programme will include:

- VWC to liaise closely with Local Authorities, An Garda Traffic Corps, DAFM, existing Horse Projects and Traveller Visibility Groups;

- VWC to identify areas where horses are kept that fall outside the regulated horse sports groupings;
- Visit sites as identified above and assess the level of awareness of horse welfare. Offer education programmes on horse welfare and good horse husbandry and introduce the sport of harness racing on the track;
- Link these groups with the IHRA and promote racing education programmes to upskill all such personnel to encourage racing within the regulated sport of harness racing;
- Continue to expand on the courses as currently underway in Dublin, Tipperary and North Cork as currently funded by the DAFM;
- Expand such welfare courses into Athy, Kilkenny, Limerick, Galway, Wexford and all other areas to be identified experiencing difficulties with sulky driving and racing on the roads;
- Identify sources other than the DAFM for funding of such projects;
- Encourage local authorities to make lands available on which to establish tracks under the auspices of the IHRA to manage and control these sites and encourage their use on non-racing days as training and exercise grounds for unregulated trotters to eliminate the need to run such animals on public roads;
- Acquisition of land and tracks in appropriate regions across the country for training and horse maintenance purposes;
- Encourage the transportation of the horses via jeep and box or small lorries to these sites for day to day exercise;
- Ensure there are welfare considerations for the horses including the provision of running water for hose-down and drying-off after exercise and monitor the welfare of these horses as they make use of such facilities;
- Begin with such a project on the lands as available in Fingal and quickly expand to Co. Cork, Co. Tipperary and a Midlands or West of Ireland site as soon as practical;
- The VWC and other Committees including Stakeholders to develop local Sub-Committees to construct, manage and control these land sites through fundraising within the local areas including private equity and sporting grants;
- Promote to owners of unregulated horses from urban areas the merits of the regulated sport as conducted under the remit of the IHRA;
- As has always been maintained there is no 'quick-fix' and will require a generational change however this cannot commence until the appropriate infrastructure is in place.

9. Enhancing horse welfare in the industry

The sport of harness racing can provide true value to the standing and status of the horse in Ireland. The IHRA is the correct body to administer welfare of standardbreds throughout the country (both for legal and the current illegal racing). IHRA is the recognised body for the regulation of the sport and through its knowledge of the activities of those who conduct illegal sulky-racing on the roads can function as the organisation to deliver uniformity across the industry.

As part of this Strategic Plan the IHRA recommends the following for consideration.

Within the IHRA the Veterinary, Welfare and Integrity Sub Committee (VWC), will report to the IHRA Board. Many VWC Committee Members stand separate to the industry and are ideally placed to identify and administer all areas relating to horse welfare, both inside and outside the sport of harness racing.

Funding for the VWC is to be included within IHRA budgets. IHRA believes a dedicated amount of funding to be a standalone amount to be directed to this important function. It will be the responsibility of this Committee to provide the IHRA Board with a budget going forward before funding allocation is appropriated.

Points of Action (all responsibility of VWC with oversight by IHRA)

1. Registration of IHRA Horses and Other Standardbreds

- This would include the administration of such a task. In addition, premises inspections to be carried out to ensure all animal husbandry and welfare issues are in accordance with best practice;
- Ensure Veterinary Cover and VWC presence at ALL race meetings.

2. Unregistered Standardbreds

- Identify sites/areas where these horses are located and assess existing welfare conditions;
- Encourage involvement in Horse Welfare training courses as appropriate and where it is deemed necessary;
- Register Horses for their numbers and whereabouts;
- Participation courses to engage with the IHRA rules of racing on the track. This would include liaising with horse charities, Garda Traffic Corps, Local Veterinary Practices and Local County Councils.

Within harness racing, the Standardbred can race up to the age of fifteen. After that age he must retire. There are many avenues available to the owner at this point for the horse in retirement.

Standardbreds are very calm animals compared to thoroughbreds. This characteristic therefore allows them to be trained into other horse codes within equine sports. These range from carriage driving, show jumping, leisure sports, showing, and breeding. Standardbreds can easily be trained

for hackney or carriage driving whether it be competitive or as simple as taking tourists around a town. A good example is Killarney's jaunting cars or Horse Sport Ireland's (HSI) Carriage driving. Standardbreds have also proved their performance and versatility as show jumpers in the past and excelling through pony club championships as well as other major HSI events.

Within the next five years, part of the IHRA's strategy is to create a programme which creates positive routes for the Standardbred, both immediately after their racing career or for those who may be prematurely forced to retire through injury or otherwise cannot race. The main objective of such a programme would be to ensure a smooth transition from racecourse to retirement.

IHRA is looking to activities which include being ridden or other horse disciplines as described above or entering long-term retirement home for the horse to enjoy after their career. Such a programme will involve the cooperation of all trainers, owners and stakeholders within the IHRA. This will require horses having the appropriate training necessary to overcome the competitive nature of racing. Committees within the IHRA are working together to address this situation. The plan is for horses to be given time to adapt to their new lifestyles and code.

Mastering re-entering the new discipline these horses may be on-sold to new owners. This can create more investment for the economy as the horse is remaining competitive within other sports. It will allow the horse to be rejuvenated.

The 'HERO Programme' was established in Australia in 2015 with a primary focus on harness education and identifying re-homing opportunities as part of the 'Victoria 2020 Strategic Plan'. Since its inception it has proven to be very successful from all angles of the sport as well as from the horse welfare point of view. It is the intent of the IHRA to use this model as the foundation to design a similar programme for Ireland. This is projected to be completed during this Five-Year Strategic Plan.

10. Annual work plan schedule for 2019

The following actions are scheduled for Year 1 implementation in this strategy. They focus on strengthening the organisation, further improving governance and on providing the foundations upon which the organisation will operate going forward.

The 2019 work plan actions are spread across five categories as follows:

Admin – core operational costs of the organisation.

Structural – strengthening the organisations structural capacity.

Operational - Operational activities

Programmatic – Training, Integration and Skills development

Action No.	Description	Action type
1.1	Devise a strategy to rotate/refresh board & sub-committee members	Structural
1.2	Adopt and implement operational policies and procedures	Structural
1.3	Establish and resource an Audit and Risk Committee	Structural
1.4	Sign up to the Governance Code	Structural
1.5	Annual Governance Training for Board and Staff	Structural
1.6	Prepare Induction pack for new board and committee members	Structural
2.1	Open a National office and recruit a full time CEO for the IHRA	Admin
2.2	Recruit an office administrator	Admin
2.3	Provide relevant training and supervision to staff	Admin
2.4	Conduct annual staff appraisals	Admin
3.1	Introduce an annual sale of Irish Bred Horses.	Operational
3.2	Establish Breeders Bonus scheme	Operational
3.3	Introduce Categorisation for Breeding Stallions and Mares	Operational
3.4	Develop a Breed improvement programme for Irish Breeders	Operational
3.5	Provide system of accessible Breed statistics	Operational
4.1	Organise importation of quality broodmares from overseas annually.	Operational.
4.2	Co-ordinate and subsidise the lease of high quality stallions from overseas.	Operational
5.1	Maintain, expand and build on the success of the current integration programme	Programmatic
5.2	Facilitate access to horses to race in IHRA approved events	Operational
5.3	Design and introduce advanced integration training programme including apprenticeships with major stables.	Programmatic
6.1	Develop and launch a series of accredited training modules for drivers, trainers and breeders.	Programmatic

11. Monitoring and Progress Tracking

The IHRA are fully committed to the implementation of this strategy. The Board at the Sub Committees are fully aware of the need to put in place a clear mechanism through which progress can be tracked and return on investment can be monitored. By doing this we can ensure information will be readily available and placed as an agenda item at board meetings and that corrective action can be taken in a timely manner to address any difficulties encountered with actions. While individual actions will have specific indicators on an annual basis high level indicators tracking the development on the industry are also required.

This exercise has never been undertaken before and the following are the proposed metrics which are seen by the organisation as a good starting point from which a baseline can be established and also from which progress from the baseline in subsequent years can be compared to. This will also enable % increase targets to be set per metric indicator.

This system of recording will require resources to be put in place and will also implement however we feel this is essential both for the organisation as a management tool for the board in policy preparation and effectiveness monitoring, and also for the Department and other potential funders to meet return on investment and value for money standards expected by DPER and others.

Type	Number 2018	Number 2019	Number 2020	Number 2021	Number 2022	Number 2023
IHRA AS AN ORGANISATION						
Members	227	275	350	400	450	500
Trainers	110	125	150	180	210	230
Drivers	150	160	170	180	200	200
Breeders	172	180	200	210	220	230
Owners	160	175	220	260	300	325
Stewards	10	12	15	20	22	22
RACE MEETINGS						
IHRA Races	60	75	85	90	95	100
PMU Races	1	2	4	8	12	15
Broadcast standard Stadiums	1	1	2	3	3	3

Private training tracks	10	12	15	20	20	20
Attendance at race meetings	13,800	18,375	25,500	31,500	35,625	40,000
BREEDING STATISTICS						
Breeding Mares Trotters	50	65	100	175	210	250
Breeding Mares Pacers	120	130	140	150	160	170
Stallions Trotters	2	2	4	4	5	5
Stallions Pacers	20	15	12	10	8	5
Registered Foals born to Standard bred	130	140	150	240	285	325
FINANCIAL METRICS						
Prize money	€800,000	€982,500	€1,400,000	€2,000,000	€2,800,000	€3,500,000
Money wagered on all races	€750,000	€1,600,000	€5,000,000	€12,000,000	€18,000,000	€24,000,000
Commission received by IHRA	€22,500	€48,000	€150,000	€360,000	€720,000	€960,000
No. of race meetings broadcast PMU	1	2	4	8	12	16
Additional Non grant income generated by IHRA	€275,000	€350,000	€450,000	€550,000	€650,000	€750,000

TRAINING						
Integration Programme participants	15	30	60	100	150	200
Introduction to Harness Racing Participants	0	15	30	50	75	100
No. of drivers, breeders, owners, stewards trained	60	100	150	175	200	225
INTEGRITY						
No. of independent tests pre-race	100	150	200	250	300	325
No. of independent tests post-race	50	150	200	250	300	325

12. Cost benefit of Industry to Ireland and N. Ireland

The national impacts of the Harness Racing industry can be measured and have been seen to be of a positive effect in other countries Worldwide over the past decade. As has already been demonstrated through the findings from the Indecon Report the industry has significant untapped potential not yet 'harnessed' for the social and economic gain for the island of Ireland, North and South. In these challenging times with Brexit a few short months away, and with the impacts as of yet unknown initiatives to imbed collaborative economic actions are more important than ever before.

Harness racing provides one such avenue. Harness racing impacts and the gain can be classified as social or economic. Both have a contribution to make to society and both have an economic dividend.

At a Macro level National Economic and Social Outcomes can be categorised under three headings

- Tourism, Cultural and Recreation Services
- Agriculture, Forestry and Fishing
- Healthcare, social care and assistance

Targets under each of these headings as a proportion of GDP should be set.

The industry metrics established in chapter 13 of this report have been designed as a starting point to recoding this data.

10.1 Economic Cost Benefits

In considering the expenditure impact of the harness racing industry, it is important to consider the internal flows of moneys that occur between different sectors. It is important in analysing potential impacts that duplicate expenditures are not included in the calculations.

Expenditure impacts generated by the industry typically will originate from two sectors, namely Participants and Consumers.

Participants comprise of those who are responsible for the production of standardbreds, particularly trainers, breeders and owners.

Through the consumption of racing as either an entertainment experience or as a betting product, consumers can generate significant levels of expenditure.

The ability to accurately record cost benefit is dependent on the recording and availability of current relevant data that is credible and substantiated.

Direct and indirect employment in the industry can contribute to PAYE and self-assessment income tax figures as can levy's and taxes on the association activities and supplies to the industry at all levels.

Key costs centres' where very significant investment would take place should the industry develop would be;

- Capital expenditure in Tracks, stables and training facilities
- Supplies of feed, veterinary and services to the Breeding industry
- A new training industry would evolve.
- Tourism spend from overseas visitors due to large influx of enthusiasts from overseas.
- Investment of prize money in local and predominantly rural economy by breeders and owners.
- Levered private sector investment in breeding stock and private infrastructure.
- Income from overseas betting commission and broadcast rights.

A positive impact on the country's GDP and balance of trade can be achieved through a carefully managed growth strategy.

It is proposed that any investment in the industry by the state would be matched at a minimum by a corresponding investment from private sources on a €1 for €1 basis.

To date all investment has been exclusively privately funded. Harness Racing has the potential to bring significant returns for the Irish exchequer through VAT, income tax from both direct and indirect economic activity. The tourism potential of this industry is not developed and income streams creating employment and bringing visitors in particular from overseas has potential to reap financial reward.

The cash benefit to the exchequer can be significant and it is anticipated that up to 30% of all moneys invested in the industry from both private and public sources collectively will end up being returned to the exchequer both directly from the main industry players and indirectly from supplier to the industry in the form of VAT, income tax or PAYE/PRSI.

10.2 Social Impacts

The primary social impact is associated with addressing in a meaningful way the road racing problem experienced in certain communities nationwide. The longer term economic benefits to the state are also significant in addressing this issue by mainstreaming the Integration type programme.

Other social impacts include;

Community building of horse enthusiasts particularly those from marginalised groups as the IHRA intend to manage the development of the industry to ensure it does not become an elitist sport.

Alternative outlet for disaffected youth in towns and cities. There is opportunity for the industry to work with the primary youth organisations Youth Work Ireland, Foroige, and the ISPCC to recruit participants on our youth programmes. There is also potential for collaboration with Garda Youth Diversion programmes Youth reach centres in target areas. This alternative method of engagement with young people could reap real life long benefits breaking in some cases intergenerational cycles of anti-social behaviour and social disadvantage.

10.3 Financial Impacts in the economy

As referenced in the Indecon report the Harness racing industry has potential to make a valuable contribution to both the Irish and European economy.

This additional economic activity can create jobs, sustain existing jobs and provide much needed alternative income streams to parts of rural Ireland. In order for this to be achieved confidence in the industry needs to be garnered to secure new private sector investors into breeding and training and also in services to the industry.

Chapter 11 of this strategy outlines the key metrics that are projected by the IHRA should this strategy be implemented and the necessary resources secured to kick start its genesis.

The following is a breakdown of the increased turnover which is projected to be achieved within the first 5 years of the commencement of the implementation of this strategy;

- Prize money available at Irish Races would rise by €2.7million from €800,000 to €3.5 million.
- The total amount of money wagered on races on Irish soil would increase by €23.25 million from €750,000 to €24 million. This is based on an international broadcast standard track being developed.
- The income received by the IHRA from the 3% commission on betting would increase by €937,500 from €22,500 to €960,000.
- The number of foals born to Irish Standard Breds would increase from 130 to 325 a 250% increase. These additional 1,130 foals over the 5 year period born would have a cumulative sale value of €5.65 million based on average market value of €5,000.
- 420 breeding Mares would be located in stables in Ireland breeding foals for both Irish and International markets. The costs of keeping each mare is estimated on average to be €3,000 with a cumulative spend of in excess of €1.26 million per annum.
- 10 new private training centres would be developed at an average cost of €250,000, cumulative spend of €2.5million.
- 2/3 international standard race tracks would be developed at cumulative estimated cost of €5.5 million.
- No of horses participating in racing in Ireland in 5 years' time would increase to 800 with an average cost per week of €250(ref. Indecon) equating to €13,000 per horse per annum or €10.4 million cumulative.

In summary a total annual turnover generated by the Irish Harness Racing industry directly would be in the region of €41.52 million with a further capital investment programme over the 5 year period primarily private sector driven with state support in the region of €7million.

This excludes any income from tourism spend, hospitality industry, ancillary services such as broadcasting, marketing and the social dividend this industry could provide to address unregulated road racing in Ireland and providing an alternative outlet for young people in providing training and employment opportunities and also in meeting their social needs. These have been excluded from this exercise as they are very difficult to quantify.

