

Research Report

Analysis of Structures and Business Operating Areas of European State Studs

Thesis Bachelor Degree

by

Ann-Cathrin Doelzer

4th year student Equine Leisure and Sports

under external supervision of

Dr. Astrid von Velsen-Zerweck

and Dipl. Ing. Alexandra Lotz M.A. M.Sc.

ESSA - European State Studs Association

and internal supervision of

Constanze Röhm M.Sc.

University of Applied Science Van Hall Larenstein

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Abstract

This thesis was conducted to analyze the structures of European state studs in regards to business structures, resources and developments of European state studs. The goal is to support the work of the European State Studs Association (ESSA) which is building up a network between European state studs. The networks' goal is to advance collaboration between state studs, to simplify information exchange and to have an organization which represents the state studs politically (ESSA, 2010). A working network needs a database where information can be retrieved. Until now there has been only incomplete and very little data about breeding, infrastructure, management and resources of the different European state studs available which made the establishment of ESSA network and an effective communication between the members and potential members of ESSA nearly impossible.

Necessary data was gathered through a questionnaire which was sent to 42 European state studs whereof 14 questionnaires were received back. Gathered quantitative data was analysed by the statistical computer software programme SPSS 16.0 Student Version for Windows. Qualitative data was analysed with the help of the MS-Office program EXCEL or it is presented descriptively.

Analysis showed that state studs are historic monuments with old traditions. But during the past years state studs developed further to modern service providers and are not just equine breeding institutions anymore. Next to services around the horse European state studs provide also touristy programmes and cultural events. However are most state studs still dependent on governmental subsidies to keep up the business in its current form. Successful and profitable state studs concentrate their main activities only to one business branch, for example educational courses or covering business. Cooperations between state studs are already important tools, and will be even more in the future, to sustain at the market next to private equine businesses. Those cooperations offer great opportunities for exchange of knowledge, experiences, genetic resources and to realise projects one stud would not be able to.

The study was limited by a low return rate of questionnaires and fragmentary completed questionnaires. Especially financial data was missing which was essential to make conclusions about profitability and key success factors of a stud.

The data conducted through this study will be made available to ESSA and will be foundation for establishing a database about European state studs.

Key words: state stud, national stud, stud association, European studs

Zusammenfassung

Viele Staatsgestüte existieren bereits seit 1700 und das Haupt- und Landgestüt Marbach wurde bereits schon 1514 zum ersten Mal erwähnt. Staatsgestüte haben meist wunderschöne historische Gebäude, alte Traditionen und historische Zuchtlinien, welche die europäische Geschichte auf einzigartige Weise dokumentieren und die Biodiversität erhalten. Um die Politik und Gesellschaft auf die Besonderheit der europäischen Staatsgestüte aufmerksam zu machen wurde 2009 die Vereinigung der europäischen Staatsgestüte (ESSA – European State Studs Association) gegründet. Das Ziel der ESSA ist der Aufbau eines Netzwerks, welches die Staatsgestüte miteinander verbindet, um den Informationsaustausch zu vereinfachen und eine Organisation zu haben die Staatsgestüte politisch vertritt (ESSA, 2010). Die Grundlage für den Aufbau eines solchen Netzwerkes sind Informationen über die Organisation, Pferdezucht und Pferdehaltung, Ausbildung, Forschung, Marketing, Kultur und Tourismus eines Gestüts (ESSA, 2010). Bisher waren nur sehr wenige und unvollständige Daten über die einzelnen Staatsgestüte vorhanden, weshalb ein Netzwerkaufbau und eine effektive Kommunikation zwischen den Mitgliedsgestüten und potenziellen Mitgliedsgestüten fast unmöglich waren.

Diese Analyse wurde erstellt, um die Arbeit der ESSA zu unterstützen indem der ESSA Daten über die individuelle europäische Staatsgestüte zur Verfügung gestellt werden, welche eine solide Basis für den Aufbau eines Netzwerkes bilden und einen Austausch von Betriebsmitteln und Wissen vereinfachen. Außerdem wurden die Gestüte auf ihre Wirtschaftlichkeit und ihre Möglichkeiten am Markt neben privaten Betrieben bestehen zu bleiben hin untersucht.

Die benötigten Daten wurden mit Hilfe eines Fragebogens gesammelt, der an 42 europäische Staatsgestüte versandt wurde. 14 Gestüte haben an der Analyse teilgenommen. Die erhaltenen quantitativen Daten wurden mit Hilfe des Statistikprogramms SPSS 16.0 Studentenversion für Windows ausgewertet. Qualitative Daten wurden mit Hilfe des MS-Office Programms EXCEL beurteilt oder deskriptiv dargestellt.

Die Analyse zeigt, dass Staatsgestüte zwar historische Denkmäler mit alten Traditionen sind sie sich aber in den letzten Jahren zu modernen Serviceunternehmen entwickelt haben und nicht mehr nur Zuchtinstitutionen sind. Neben den vielen Dienstleistungen rund um das Thema Pferd bieten viele staatliche Gestüte mittlerweile auch touristische Programme und kulturelle Veranstaltungen an. Trotzdem sind die meisten Staatsgestüte immer noch von staatlichen Subventionen abhängig, um ihren Betrieb in der jetzigen Form aufrecht zu erhalten. Erfolgreiche und rentable Gestüte konzentrieren ihre Aktivitäten auf einen Betriebszweig, z.B. Ausbildung oder Hengsthaltung. Es hat sich ebenfalls herauskristallisiert, dass Partnerschaften zwischen Staatsgestüten mittlerweile ein wichtiges Hilfsmittel sind, um neben privaten Betrieben am Markt bestehen zu bleiben. Die Partnerschaften bieten eine hervorragende Grundlage für einen Austausch von Wissen, Erfahrungen, genetischem Zuchtmaterial und um Projekte zu realisieren, die von einem einzelnen Gestüt nicht verwirklicht werden könnten. Den Gestüten wird empfohlen, im Maße ihrer Möglichkeiten, Marktlücken zu erschließen. Ebenso wichtig ist es bei Veranstaltungen auf deren Qualität und Attraktivität auch für Menschen außerhalb der Pferdebranche zu achten, um die Wirtschaftlichkeit des Gestüts zu verbessern.

Leider ist die Qualität Analyse und die Möglichkeit des Vergleichs von Staatsgestüten durch die geringe Teilnahme und teilweise nur lückenhaft ausgefüllten Fragebögen stark eingeschränkt. Besonders fehlen Finanzdaten, welche für eine stichhaltige Identifikation der Wirtschaftlichkeit und Erfolgsfaktoren notwendig gewesen wären.

Introduction

More and more European state studs are at risk to be shut down or to get privatized. Currently the closing of Swiss National Stud Avenches is discussed due to shortages in governmental budgets. Many state studs exist already since 1700 and often have beautiful buildings, long traditions and historic breeding lines which should be preserved because they document in a specific and unique way the development of European history and help to preserve biological diversity (ESSA, 2010). To make governments and public more aware of the importance of European state studs the European State Studs Association was founded in 2009 which is building up a network between European State Studs. The goal of this network is to advance collaboration between the studs, to simplify information exchange and to have an organization which represents the state studs politically (ESSA, 2010). But to be able to build up this network information about administrative structure, organization, equine breeding and husbandry, education, research, marketing, culture and tourism is necessary (ESSA, 2010). Until now there is only incomplete and very little data about the breeding, infrastructure, management and resources of the different European state studs available which makes the building of this network and an effective communication between the members and potential members of ESSA nearly impossible.

This research was conducted to facilitate the work of the ESSA. The goal is to provide the ESSA with data about the structure, resources, services and administrative structures of individual European state studs to have a basis for a good working network and to make an exchange of resources and knowledge easier. Additionally the state studs were analyzed according their profitability and possibilities to sustain at the market next to private businesses.

With the help of this research the cooperation of European state studs shall be simplified. It provides the basis for collaborations and resource exchange. Also essential key factors need to be identified which improve the possibilities for further existence and help to protect European state studs of abolishment.

The research objective was to gain a complete overview about the structures, resources and developments of European State Studs. Additionally a forecast about the future development and the profitability of national studs was made based on the gathered data. Therefore following main research questions were set up.

- Which (infra-) structure, resources, services and administrative structures does each European State Stud?
- What prognosis do national studs have according their further existence and profitability?

1. Overview of European Equine breeding sector

The following chapter will give an overview about the historic and current situation in European's equine breeding industry in relation to state studs. Additionally development, goals and work of ESSA-European State Stud Association is described.

1.1. Equine Breeding Sector in Europe

Equine breeding has a long history in Europe. First horses have been used for field work, military and transport nowadays horses are mainly bred and kept for leisure and sport. Despite the financial crisis the equine sector is still growing and is becoming an important industry in whole Europe. Equine population in the EU is estimated on 4.3 million (Haring, 2005). Germany is one of the leading equine countries in Europe especially in breeding Warmblood sport horses which is emphasised by the number of broodmares compared to neighbour countries. Germany has around 180.000 brood mares, France 100.000, Austria 13.600 and Switzerland 7.000 (Arbeitsgruppe Pferdebranche, 2007). There are over one million horses registered in Germany and the annual turn-over in the equine sector is estimated on over 5 billion Euros. In 2008 3.358 horses were sold through auctions with a turn-over of 56.825.622 Euro (FN, 2010). In the Netherlands horse sport active people spend around 1.035 Euro each year into the equine sector. Also the number of equine events increased in the Netherlands from 5.554 in 2002 to 7.293 in 2009 (KNHS, 2010). According to BHIC there are 4.3 million riders in Great Britain which spend £4.3 billion each year excluding the racing industry. In Austria the economic factor "horse" generates annually up to 1.26 billion Euros (Pferd Austria, 2005). Even in Switzerland the annual turnover of the equine sector is estimated on 1.11 billion Euros (Arbeitsgruppe Pferdebranche, 2007). In comparison to Europe the USA has 9.2 million horses and the equine industry has a direct impact of 101.5 billion dollar on the gross domestic product which is around 8.2 billion Euro (American Horse Council 2010). The U.S. equine industry provides in total 1.4 million jobs thereof are 460.000 full-time jobs (American Horse Council 2010). When comparing the size of USA with 9.6 million km² and the European Union with 4.2 km² and the number of horses the EU has actually more horses per km² than the USA (Europa, 2010)

These numbers emphasise the importance of breeding for the whole European equine industry. Breeding is very much influenced by the historic development. This means that nowadays especially draft horse breeds are threatened by extinction because these breeds seem to have no purpose anymore (ESSA, 2010). At this point the national studs appear. Almost each country in Europe has its own equine breeding history with very special breeds. The main assignment of the national studs is to preserve these traditional breeds and to create awareness about the distinguished applicability of these horses. Additionally studs provide breeders with modern sport stallions in other words they make genetic material available.

1.2. Historic development of European State Studs

The foundation of state studs can be traced back to the fact of the increased need for horses for the cavalry due to many wars already between 450 and 900 AD. Especially nobleman did controlled horse breeding with great passion. Around 1500 the first state studs known are Lipica in Slovenia, Kladruby in Czech Republic and Marbach in Germany (Haring, 2005). The nobility especially regional principedom established breeding of horses as it is known today. Before this time there was only little specific selection done but nobleman wanted to have precious horses suitable for military, work and leisure. So they started to judge foals and to select only the best stallions and mares for breeding. That was the moment where most national studs were founded (Haring 2005).

Most European national studs where established between 1700 and 1900. All of them have a quite troubled history also due to the two world wars. At the beginning the main assignment of the national studs was the breeding of horses which could be used for

military and transport and draft horses for field work (HuL Marbach, 2010). During the years the function of the studs changed. Some of those studs preserve one or two traditional breeds to keep an important part of history alive (ESSA 2010). The best example therefore is Piber with its Lipizzaner horses. Other studs developed their breeds further to modern Warmblood sport horses. National Studs had and still have an important role in the development of breeding goals, records and breeding progress (HuL Marbach, 2010). During time and modernisation the organisational structures and activities of many national studs changed. First national studs were mainly financed by noblemen, after monarchy was abolished most studs passed into public ownership some got privatised. Today state studs are important cultural heritage and help to preserve traditional breeds as well as support breeding progress (ESSA, 2010).

1.3. The role of European state studs

European state studs play an important role in the development and especially in keeping special breeds alive. Germany with its four principal and federal studs and 7 federal studs is part of the leading countries in equine breeding in Europe. Other European countries should not be underestimated regarding their breeding sector e.g. France and Poland have a lot of state studs and stallion depositories. The aim of these studs is to maintain traditional breeds, offer top-quality stallions for an acceptable price, advise breeders, educate people in topics like breeding, husbandry, riding and carriage driving as well as preserve the stud's tradition, cultural heritage and stud buildings which are often listed as monuments. Until this point state studs worked on their own, quite isolated from each other. To be able to survive in the equine breeding sector next to private owned businesses the state studs need to improve their infrastructures and their efficiency.

The main objective of German principal and federal studs is breeding Warmblood sport horses especially for riding and driving. Additionally they breed and preserve horses which are typically for their region. National studs of other European countries sometimes have a different goal. In most cases the national studs are mainly assigned to retain the traditional breeds of the country. The national stud Kladruby nad Labem in the Czech Republic is one of the oldest studs in the world mainly concentrating on their traditional breed of Altkladruber which are mainly used for carriage driving (National Stud Kladruby nad Labem, 2010). Janów Podlaski National Stud in Poland concentrates on breeding of Pure Arabians and Anglo-Arabian Half Bloods and the Austrian national stud Piber breeds the Lipizzaner Horse.

But all national, principal and federal studs have one fact in common, they all provide services next to breeding and selling horses like tourist programmes, providing their infrastructure for events or the organisation of events.

In the past most national studs also had a huge agriculture with livestock next to horses. Feed for the horses and other livestock was produced by the studs. During time governments decided to close or to minimise those agricultural departments because they were not efficient enough and most private agricultural businesses were able to produce much more profitable and efficient than the national departments could do. Only a few national studs in Europe still have agriculture and livestock to support the horse business e.g. Slovakian State Stud of Topolcianky, German principal and federal stud Marbach.

By taking a closer look at Europe's national studs an interesting factor appears. A lot of these national studs breed Arabian horses including the German principal and federal stud Marbach, State Stud Kabiuk in Bulgaria, Janów Podlaski Stud in Poland, Slovenian State Stud of Topolcianky, and Hungarian State Stud of Bábolna. This is probably a result of refinement process. History of European state studs show that an exchange of breeding horses and information between those studs already took place in the past.

As already mentioned the equine sector makes a financial turnover of billions of euros but mostly generated through private businesses and organisations. Most private businesses are in the majority of cases able to work more efficient and more profitable

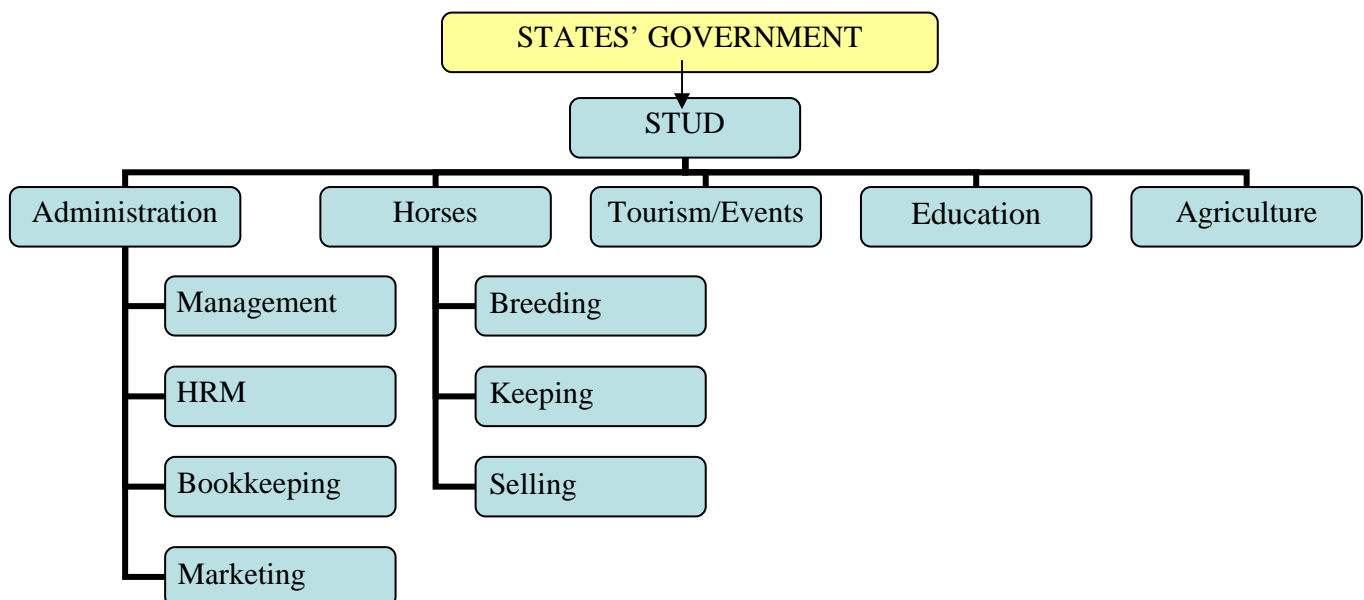
than national studs are able to. Therefore, the existence of national studs is endangered and governments ask the studs to work.

There are quite huge differences between state studs in each European country. Some only provide stallions for breeding (Swiss National Stud Avenches), others also have mares or their main focus is on the education of horses and people, etc. The only aspect they have in common is a very long history with steady traditions. The exchange of equine material, manpower and management strategies is difficult because each stud works with different performance tests and has another infrastructure.

1.4. The structure of State Studs

By taking a closer look at the structure of European state studs it gets visible that many bigger studs have same constitution, same infrastructure and same division of activity fields.

The following diagram gives an overview of state studs' structure.



Graph 1.4-1 Common structure of state studs

Management of a state stud is quite complex due to the fact that often many parties are involved like the government, investors and especially the public.

It is visible that nearly all studs provide similar service or have the same branches of economy. The two most important is of course provision of stallions and tourism. But also training and education is an important service. Some studs e.g. Principal and Federal Stud Neustadt-Dosse in Germany and Flyinge National Stud in Sweden put a huge emphasis in education of students in cooperation with schools and universities.

Most national studs try to make themselves more attractive for tourism through special offers, attractions and museum, e.g. Bábolna National Stud with a botanical garden and National Stud Kladruby nad Labem with the provision of riding holidays.

An important assignment of state studs is also the execution of equine performance tests and stallion licensing.

In the past state studs were only concentrating on breeding horses, today this is not enough to persist next to private breeding businesses. This is the reason why state studs started to diversify their activities. Next to state studs main activities most studs started to establish a touristy and cultural programme, provide event organisation, realise equine competitions, train and sell horses and take horses into livery or even provide equestrian therapy.

In the centre of state studs still is the horse breeding but a huge number of other activities are built around it. It can be assumed that breeding is not the main source of income anymore.

A few studs still have quite a huge agriculture next to the horse business which often helps to support the horses.

The activities of state studs let assume that the target group of the studs are breeders, visitors/tourists, equine interested/related people and culturally interested people. So target group is huge and it can be concluded that it is quite complicated or rather expensive to target all these people when marketing the stud.

Resources of studs are incommensurable because it is very much depending on the size and the history of the studs. Each stud has its individual infrastructure but a lot of European state studs have historic buildings which are often listed monuments. These buildings are a perfect ambiance to offer special events like weddings but also have the disadvantage to require a quite expensive maintenance.

As it is known so far state studs only make use of external service or products when it can not be delivered by the own business. Advantage of this practice is the independence of the market but disadvantage is also that there are huge resources (e.g. ground, employees, machinery, etc.) required which need to be financed.

State studs are commonly financed through own resources, government aid and sometimes support associations, sponsors and givers. It is not known if some studs are able to be financed only by own resources.

The wide variety of activities state studs provide could present a threat for the studs because a huge number of employees with totally different specification, a complex marketing strategy and a good event management are needed. In this case it is doubtful if income is worth effort.

Another threat is definitely private businesses which are often able to invest more in good breeding material.

A positive aspect about state studs is that they are very well known and popular by breeders but also the brought public. State studs are known for their constant quality of breeding material and are an attractive place for excursion. This means that also if there are strong competitors state studs are probably able to persist next to them with the right concept.

State studs often have strict regulations on working times of their employees by contrast private businesses can agree on individual working times (HuL, 2010). Also the infrastructure of state studs is more complex than in private businesses. State studs often have many different business branches next to breeding like tourism, events, etc. Private businesses have to concentrate, most of the times, only at the "horse business" and are therefore better able to react quickly to economic changes.

1.5. ESSA – European State Stud Association

To improve possibilities and efficiency of the national studs ESSA - European State Studs Association was recently founded in 2009 even though European state stud directors meet already since 2003. The prime aim of the ESSA is to achieve recognition of European State Studs as a European cultural asset. ESSA stands for European State Stud Association which already indicates who the members are. At the moment ESSA has 20 members of 11 countries. State studs in Europe are not committed to join ESSA. each stud has, in accordance with its ministry, free choice to join. ESSA is open to European state studs and traditional studs which are concerned about the existence of historic studs, horse breeds and the utilisation of historic buildings for horse breeding (ESSA, 2010).



Graph 2.5-1 Euro board with ESSA member studs

Once a year a general assembly is taking place at one ESSA partner stud. At these general assemblies actual topics and objectives for next year are discussed.

ESSA objective for 2010 are to improve ESSAs' communication inside and outside. More members and sponsors should be obtained and the state studs promoted as European heritage. In order to achieve this objectives the website will be updated, it will be applied for European grants to support a mobility project between the studs and to support a multi-annual-cooperation project for the state studs' cultural heritage. The ESSA also wants to raise more awareness of the importance of state studs within the society by being present at shows e.g. Eurocheval at Offenburg.

The exchange of information and resources between the European state studs is quite restricted at the moment because there is a huge lack of information about the individual studs. There is insufficient data available about the organisational structure, breeds, number of horses, breeding, sources of income, tourism, etc. In order to gain a basis for building up a network to have the possibility of information and resource exchange data about the studs need to be listed and evaluated.

Until now there was very little research done about European state studs and no relevant scientific literature concerning this research topic could be found. But there is informative literature available concerning European State Studs e.g. "Gestüte" by Monika and Hans Dossenbach.

ESSA is building up a network between European State Studs but therefore information about administrative structure, organisation, equine breeding and husbandry, education, research, marketing, culture and tourism is necessary. At the moment there is only incomplete and very little data about the breeding, infrastructure, management and resources of the different European state studs available which makes the building up of this network and an effective communication between the members and potential members of ESSA nearly impossible. This problem should be solved through this research by gathering data about European State Studs.

2. Methods

2.1. Research Design

The area in which this research was conducted is the European equine breeding sector with focus on the state studs. The research was supported and coordinated by the ESSA headquarter.

ESSA has 20 which were expected to take part in the study. Additionally also the 22 potential studs were addressed.

Following table 2.1-1 gives a quick overview on the national studs which are already members of the ESSA and table 2.1-2 on the potential ESSA members.

ESSA National stud members

Country	Stud
Bulgaria	National Stud Kabiuk
Czech Republic	National Stud Kladruby nad Labem
	National Stud Tlumacov
France	Haras du Pin
	Haras National de Pompadour
Germany	Landgestüt Dillenburg
	Haupt- und Landgestüt Marbach
	Haupt- und Landgestüt Neustadt-Dosse
	Landgestüt Redefin
Hungary	Bábolna National Stud
	Hortobágyi Természetvédelmi és Génmegőrző Nonprofit Kft.
	Mezőhegyesi National Stud
	Állami Menesgazdaság Szilvásvár
Poland	Janów Podlaski National Stud
	Michalow Stud
Romania	National Forest Administration Romsilva
Slovakia	Topoľčianky National Stud
Slovenia	Lipica National Stud
Sweden	Flyinge National Stud
Switzerland	National Stud Avenches

Table 4.1-1 ESSA stud members

Potential ESSA members

Country	Stud (potential member ESSA)
Austria	Bundesgestüt Piber
Croatia	National Stud Djakovo
Czech Republic	Pisek National Stud
France	Haras du Lion d'Angers
Germany	Landgestüt Celle
	Landgestüt Moritzburg
	Hauptgestüt Graditz
	Landgestüt Prussendorf
	Haupt- und Landgestüt Schwaiganger
	Landgestüt Warendorf
	Landgestüt Zweibrücken GmbH
Hungary	Marocpusztai Menes Gidran Studfarm Maroc
Ireland	Irish National Stud
Italy	Istituto sperimentale per la zootechnica Monterotondo
	Istituto Incremento Ippico Della Sardegna
Poland	Bialka Stud
	Bialy Bor Stallion Depot
	SKH „Gładyszow“ Sp. Z o.o.
	STADNINA KONI PRUDNIK SP Z O O
Portugal	Coudelaria de Alter
Spain	Fondo de Explotacion de los Servicios de Cria Caballar y Remonta
United Kingdom	Newmarket National Stud

Table 4.1-2 Potential ESSA members

The necessary data for this research was collected by a questionnaire. The questionnaire was extensive because it covered all fields of work of a stud. This was decided in consensus with ESSA even though it provided the risk of getting participants reluctant to complete the questionnaire. To make completion the questionnaire was build up in sections which are identical with the structure of most state studs. This provided the general manager with the opportunity to assign different parts of the questionnaire to the responsible people in each work field. To increase the return rate principal and federal stud Marbach and Swiss National Stud Avenches provide covering vouchers which are draw between the on time returned questionnaires.

Questionnaires were addressed directly the managers of each stud and through a cover letter they were informed about the importance of the questionnaire and benefits of being a member of ESSA

To maximize response rates, validity and reliability attention was paid to design of questions, layout, explanations and administration of the questionnaire (Saunders et al., 2007).

Questionnaires were sent to studs by post on paper and digital via Email as MS-Office Word-document and as PDF-document. It was also sent digitally to the responsible person of each stud to make sure that the questionnaire reaches the right hands (Saunders et al., 2007). The MS-Office WORD-document was prepared with tools to make an easy and quick completion possible.

To collect the data by questionnaire was the only possible method to be able to gather complete, sufficient, reliable and valid data in the given period of time. Interviews or visits for observations at the individual studs were not realisable because there were not enough financial and temporal resources available. In this research it was also

important to gather standardised data otherwise it would be difficult to use the analysis as basis for the ESSA-network.

At the return date only 4 questionnaires were handed in so all studs which did not return the questionnaires were called and asked for a quick return.

After a “remind” email 14 questionnaires were received in total. Questionnaires from following studs were received and were given a number according their date of receipt.

Number	Stud	Country
1	Irish National Stud	Ireland
2	National Stud Djakovo	Croatia
3	Landgestüt Dillenburg	Germany
4	Landgestüt Zweibrücken	Germany
5	Landgestüt Sachsen –Anhalt	Germany
6	Michalow Stud	Poland
7	Landgestüt Redefin	Germany
8	Topol'čianky	Slovakia
9	Landgestüt Celle	Germany
10	Nationalgestüt Avenches	Switzerland
11	Haupt- und Landgestüt Neustadt-Dosse	Germany
12	Haupt- und Landgestüt Marbach	Germany
13	Flyinge National Stud	Sweden
14	Haupt- und Landgestüt Schwaiganger	Germany

2.2. Data Collection

The target people who were addressed by the questionnaire are the 42 general managers of the studs, respectively the ESSA contact people. The individual contact details were provided by the ESSA head office.

As already mentioned in the previous chapter, the questionnaires were sent by post and via email to the individual contact person which could then assign different parts of the questionnaire to the individual work fields at the stud. The studs were given three weeks to complete the questionnaires and return it.

There was more data collected through the questionnaire than actually need for this research. The excess data will be made available to ESSA for further research. This approach is applied to prevent the state studs from getting tired of filling in more questionnaires in future.

2.3. Data Processing

The data of the returned questionnaires is analysed with the statistical computer software programme SPSS 16.0 Student Version for Windows. These programmes make it possible to analyse, compare, and identify related data and to make them more feasible by graphics or tables. The data is entered into the program wherefore a coding will be used if necessary.

There is also qualitative data which could not be analysed by SPSS, e.g. open questions. This data is analysed with the help of the MS-Office program EXCEL or it is presented descriptively.

The excess data will be summarized and made available to the ESSA by EXCEL tables.

3. Results

In the following chapter results of 14 European state studs will be presented. It is assumed that there are 42 state studs in Europe therefore 14 is representing 33% of those studs which is a representative number and results can be concluded to be valid. It needs to be emphasised that information about finance is only provided by 8 studs additionally information is fragmentary. Therefore no valid results and conclusion can be provided about financial aspects of state studs.

For simplification official names of studs are curtailed on their location e.g. "Principal and Federal Stud Marbach" is shortened to "Marbach"

3.1. Management and Organisation

Following table presents an overview on the corporate structure of European state studs.

Corporate Structure	Number of studs
State owned business	10
Public company	1 but government holds shares
Limited Liability company and foundation	1
Foundation of public law	1
Owned by foundation	1

Table 4.1 Corporate Structure of European state studs (N=14)

11 of 14 studs are directly subordinated to the agricultural ministry of their state or federal state. Only Zweibrücken is a limited liability company and therefore not dependent on any government. Neustadt-Dosse' corporate structure is a foundation of public law and therefore still subordinated to the agricultural ministry of the federal state but with freedom of decision making. Flyinge is owned by a foundation and therefore needs to report directly to the foundation.

Management assignments differ greatly between studs, but breeding management, administrative tasks (human resource management, coordination, etc.), representation, education, tourism, events, research and preservation of cultural heritage (breeds, buildings, knowledge) could be identified as superior categories.

3.2. Dependence on states' government

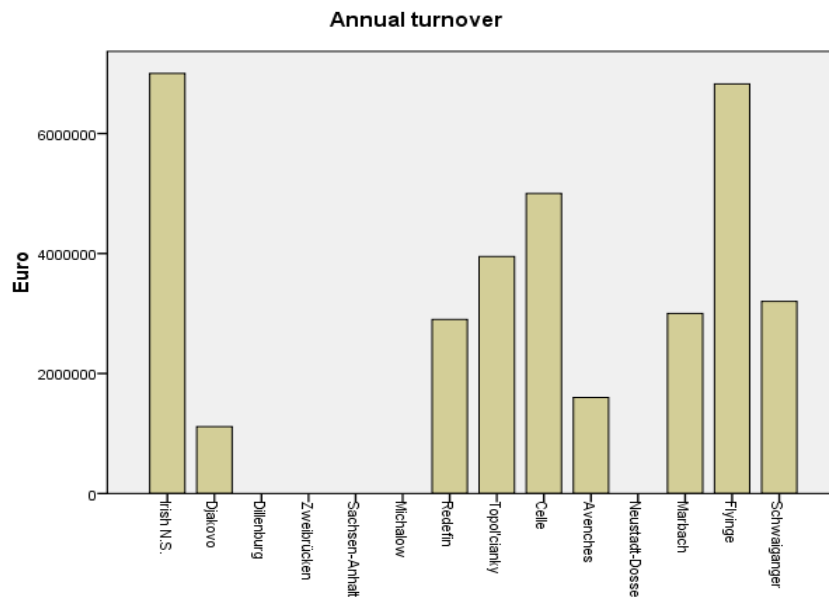
The dependence of state studs on their governments is connected to the fact of own profitability and how many state subsidies they require. Irish National Stud, Federal Stud Celle and Swedish National Stud Flyinge are able to finance themselves by own resources. Redefin is financed with 50% by the government, Schwaiganger only with 27%. The studs Djakovo, Dillenburg and Marbach are financed with more than 50% state subsidies.

Another factor of governmental dependence is that 11 of 14 studs are subordinated to agricultural ministries which, of course, indicate a dependence on studs' governments.

3.3. Financials

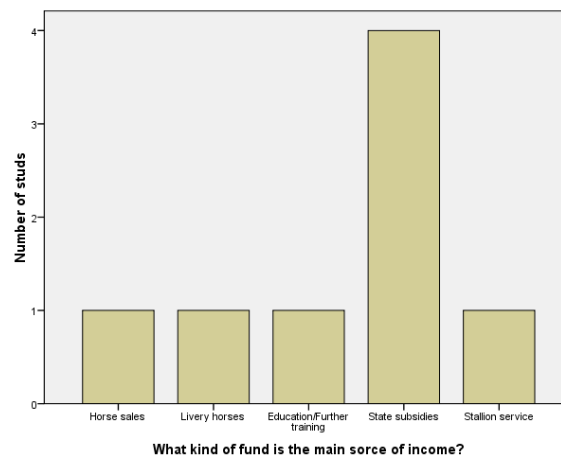
Only 9 studs provided information about financial resources.

The annual turnover of state studs varies between 1.6 and 7 million Euro therefore the average turnover is about 3.8 million Euros (see Graph 4.3-1). No significant correlation between the annual turnover and total number of horses kept at the stud could be found. There is also no significant correlation between annual turnover and total hectare operational land.



Graph 4.3-1 Annual turnover, no information available about studs Dillenburg, Zweibrücken, Sachsen-Anhalt, Michalow and Neustadt-Dosse

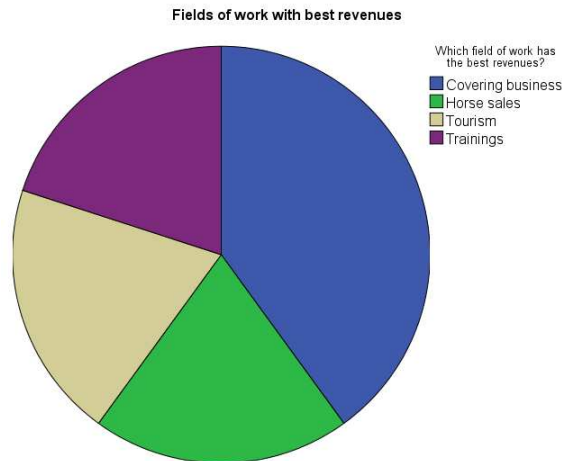
Following graph 4.3-2 makes visible that state studs are often dependent on external finances meaning mostly state subsidies. Those subsidies are the main source of income for 4 state studs of the 8 who presented information on their financial resources. Also visible in graph 4.2-1 above is that only 3 of 8 studs are able to finance themselves by own resources.



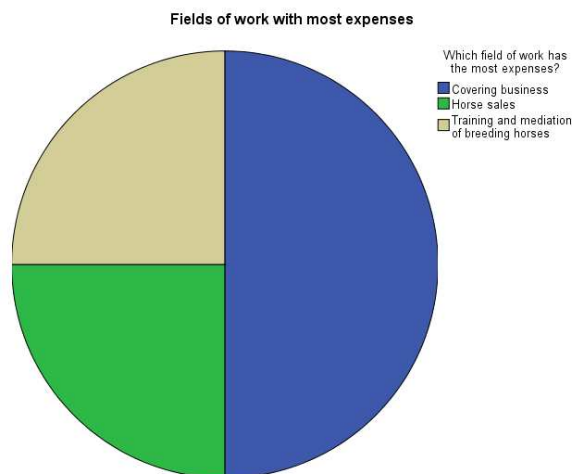
Graph 4.3-2 Studs main source of income (N=8)

Results for revenues and expenses of the different work fields are not valid because only five studs gave information to the question 11 "Please estimate the financial balance of your business' fields of work in percentage?" Although following graphs give and impression about main sources of revenues and costs.

For two of those five studs covering business generates most revenues but it is also visible that covering business also generates most costs for two of those studs.

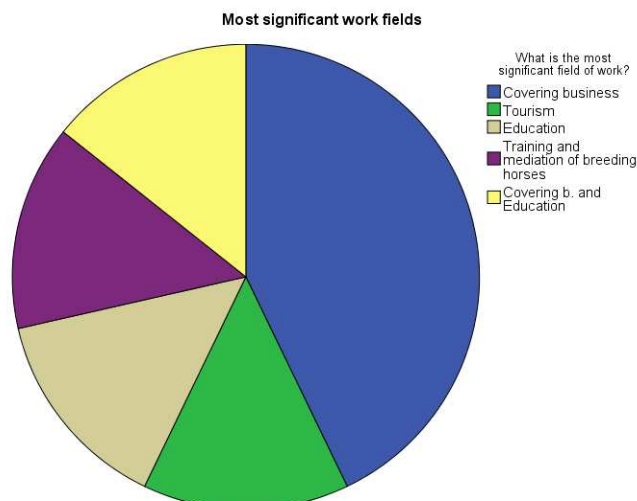


Graph 4.3-3 Studs' work fields with the best revenues (N=5)



Graph 4.3-4 Studs' work field with the most expenses (N=4)

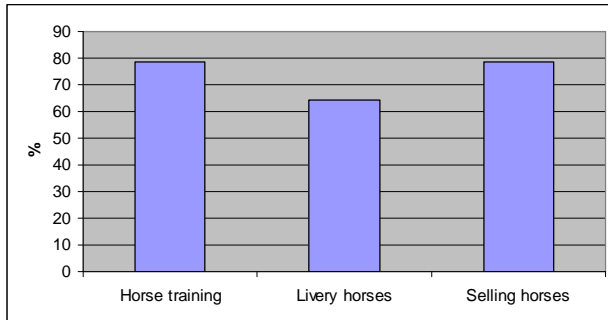
As expected covering business is most significant work field as is was in the past for three of the seven studs. For other studs it is tourism, education, training and mediation of horses or a combination of covering business and education visible in graph 4.3-4.



Graph 4.3-5 Studs' most significant work field (N=7)

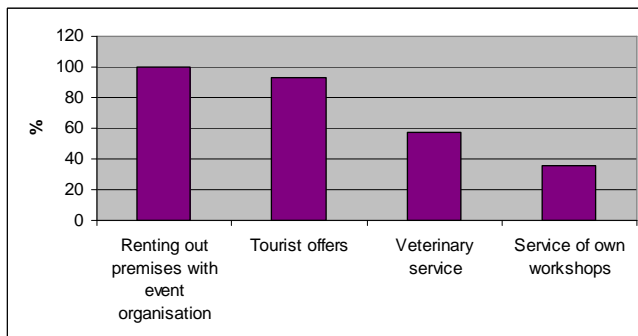
3.4. Extra services and effort to improve income and attractiveness

Next to tasks or services regarding horse breeding state studs offer additional service which is divided into the main categories “horses”, “event/tourists/own resource” and “education/research”. The most provided services are renting out premises with event organisation, consulting and further education courses. The training and selling of horses is provided by 11 studs. The graphs below show the different categories and frequency of additional service.



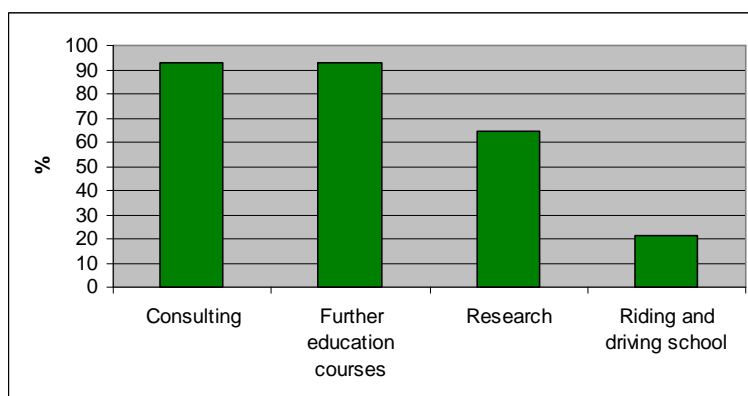
Graph 4.4-1 Percentage of studs which provide additional service in the category “horses”

Following graph 4.4-2 shows the services provided by the studs in the category “event/tourism/own resources). All stud provide the service of renting out own premises combined with event organisation and 85 % of the stud also provide tourist offers.



Graph 4.4-2 percentage of studs which provide additional service in the category “events/tourism/own resource”

Graph 4.4-3 shows that also consulting and further education courses are an important additional service which is provided by 93% of the studs.



Graph 4.4-3 Percentage of studs which provide additional service in the category “education/research”

3.5. Resources

In this chapter important resources of the studs will be presented. It makes visible how different the studs are and that it is nearly impossible to compare those studs with each other.

3.5.1. Horse breeds

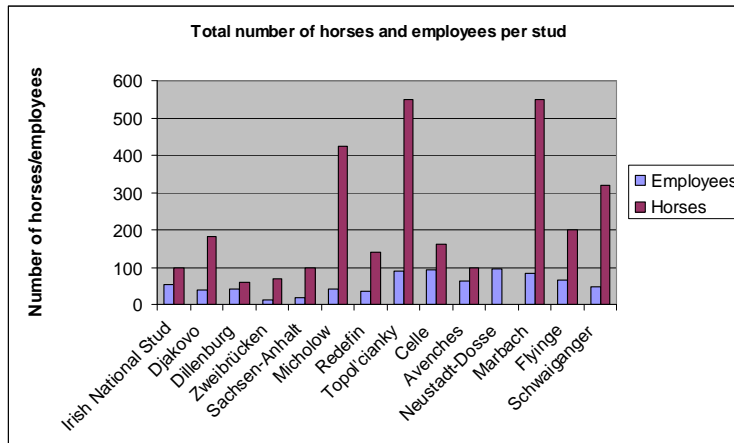
Following table 4.5-0 shows the different horse breeds bred at the National studs

Stud	Breeds
Irish National Stud	Thoroughbred
National Stud Djakovo	Lipizzaner
Landgestüt Dillenburg	Warmblood Horse(mainly Hanoverian) Draft Horse Pinto Riding Pony/Welsh Pony
Landgestüt Zweibrücken	Warmblood Horses
Landgestüt Sachsen - Anhalt	German Warmblood Horse Altmärker Draft Horse Trakehner
Michalow Stud	Pure Bred Arabian Malopolska-Appaloosa Ponies
Landgestüt Redefin	Warmblood Horse Thoroughbred German Riding Pony Haflinger Horse Lewitzer Horse Draft Horse
Topol'čianky	Lipizzaner Shagya-Arabian Pure Bred Arabian Huzullen Horse Slovakian Horse
Landgestüt Celle	Warmblood Horse Thoroughbred Anglo Arabian
Nationalgestüt Avenches	Freiberger (Draft Horse) Warmblood Horse
Haupt- und Landgestüt Neustadt-Dosse	German Sport Horse Trakehner
Haupt- und Landgestüt Marbach	German Warmblood Horse Pure Bred Arabian Black-Forest Draft Horse English Thoroughbred Altwürttemberger (Heavy Warmblood)
Flyinge National Stud	Swedish Warmblood Horse
Haupt- und Landgestüt Schwaiganger	Bavarian Warmblood Horse South German Draft Horse Haflinger Horse

Table 4.5-0 Overview on breeds bred at European state studs

3.5.2. Comparison horses/employees

The ratio between horses and employees differ completely between studs and countries (see graph 4.5-1). The minimum of the ration horse per employee is 1.46 at the stud Dillenburg, the maximum ratio is 10.07 horses/1 employee at Michalow stud. The ratios include all employees it is not differentiated between administration and stables.



Graph 4.5-1 Number of horses compared to number of employees

Although the number of employees is very different between studs a significant correlation could be found between number of horses and number of employees (Table - see Annex)

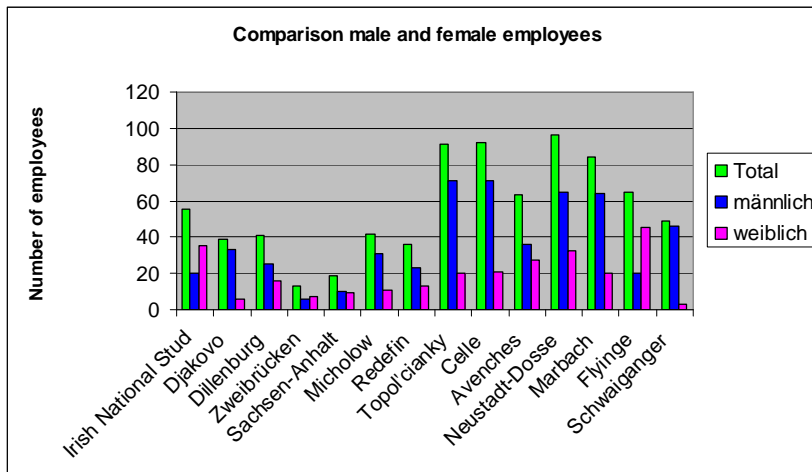
3.5.3. Comparison male/female employees

The ratio of male and female workers is also different between studs and country. Table 4.5-2 gives an overview on the differences between total number of employees and female employees.

Descriptive Statistics					
	N	Minimum	Maximum	Mean	Std. Deviation
How many people does the stud employ in total?	14	13,0	96,5	56,107	26,9659
How many women work for the stud	14	3,0	45,0	18,857	12,3279
Valid N (listwise)	14				

Table 4.5-2 Descriptive Statistics of number of total employees and female employees

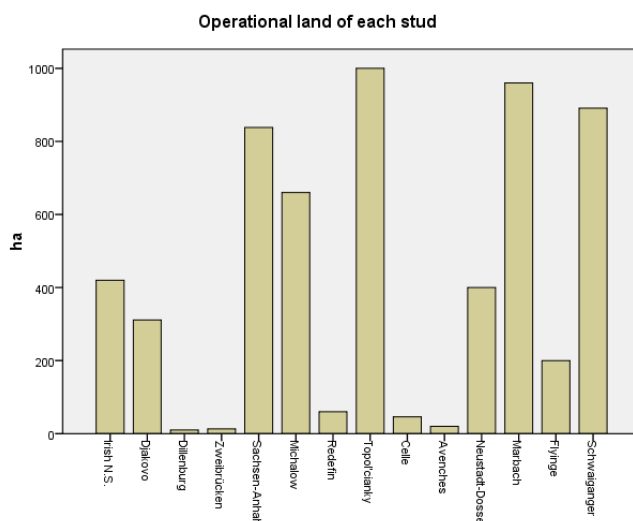
Most women are employed at Swedish Stud Flyinge which has a ratio of 0.44. This ration shows that Flyinge has more women employed than men. German stud Schwaiganger has the smallest proportion of female employees with a ratio of 15.33. So there are actually 15.33 male employees for one female employee. Graph 4.5-3 makes this fact visible.



Graph 4.5-3 Comparison between total, male and female employees of N=14 studs

3.5.4. Operational land

Operational land is an important factor for studs. It often limits the number of horses which can be kept at the stud and can be essential for own feed production. Graph 4.4-4 represents the hectare operational land per stud and it makes visible how different the studs are also in terms of size.



Graph 4.5-4 Hectare operational land per stud

It is assumed that there is a correlation between number of operational land and the total number of horses kept at the stud. To confirm this hypotheses a Pearson test was conducted which showed that there is a correlation between those two aspects (see table 4.5-5)

Correlations

		Total number of horses kept at your stud?	How much hectare operational area does the stud have in total?
Total number of horses kept at your stud?	Pearson Correlation	1,000	,772**
	Sig. (2-tailed)		,002
	N	13,000	13
How much hectare operational area does the stud have in total?	Pearson Correlation	,772**	1,000
	Sig. (2-tailed)	,002	
	N	13	14,000

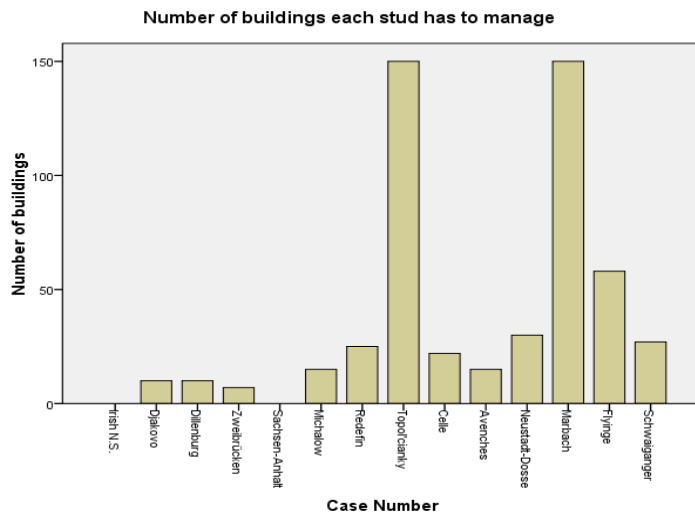
** . Correlation is significant at the 0.01 level (2-tailed).

Table 4.5-5 Correlation between operational land and number of horses

3.5.5. Farms and Buildings

57 % of European studs (N=14) have to manage more than one farm. But no significant correlation (>0.05) could be found between number of studs and number of employees.

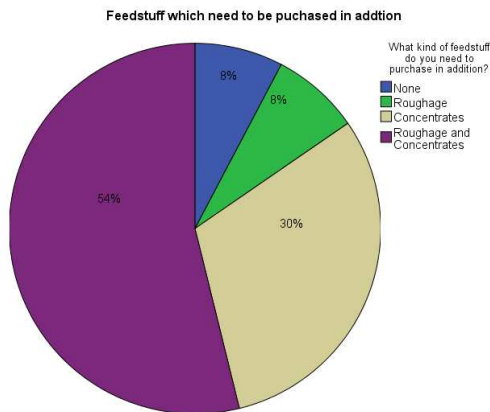
Graph 4.5-6 shows the number of buildings each stud has to manage. Thereof 10 studs have buildings which are under preservation order



Graph 4.5-6 Numbers of buildings per stud excluding information of Irish National stud and Sachsen-Anhalt.

3.5.6. Purchase of feedstuff

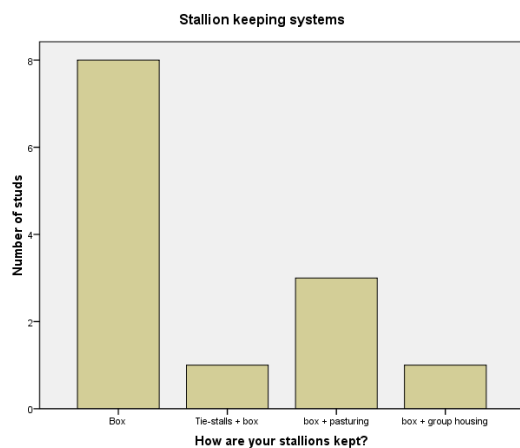
13 studs provided information about the purchase of feedstuff. 12 studs need to purchase feedstuff which they can not produce by themselves. 7 purchase roughage and concentrates, 4 only concentrates and 1 only needs roughage.



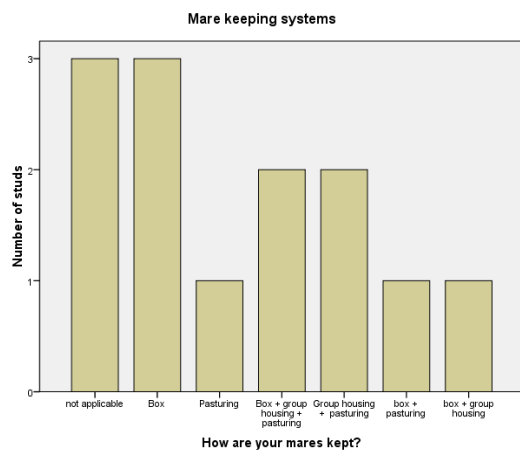
Graph 4.5-7 Additional purchase of feedstuff

3.6. Horse keeping systems

13 studs provided information about their horse keeping systems. The results for stallion keeping are presented in graph 4.6-1 and the results for broodmare keeping systems in 4.6-2. 3 of those 13 studs do not keep broodmares so there the question was not applicable.



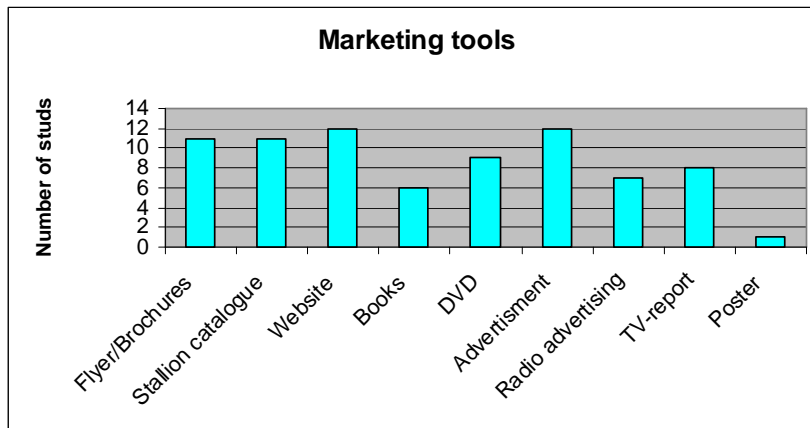
Graph 4.6-1 Keeping systems stallions



Graph 4.6-2 Keeping systems broodmares

3.7. Marketing

European state studs use marketing tools to promote themselves. 13 studs gave information to this question. As main marketing tools the own website and advertisements are used followed by flyer/brochures and stallion catalogue (for detailed information see graph 4.7-1).



Graph 4.7-1 Marketing tools of 13 studs

There is only the Federal Stud Celle which uses all marketing tools provided in the questionnaire.

Through desk research it gets visible that German studs have more funds or use more funds for promotion and marketing. The website of Principal and Federal Stud Marbach and Schwaiganger is subordinated to the website of their ministry and therefore restricted in design. German studs take out ads in popular national equine magazines like St.George and Reiter Revue International and Cavallo. But most advertisements are done in regional magazines and magazines of local breeding associations. The leaflets provided by German studs are of good quality in paper and colour. Books are very well and elaborately designed. In stallion catalogues of German national studs each stallion is described and pictured.

The Irish National stud puts even more emphasis on the presentation of its stallion in the catalogue. Individual stallions are presented on more than one page. A gift shop is also provided through the website.

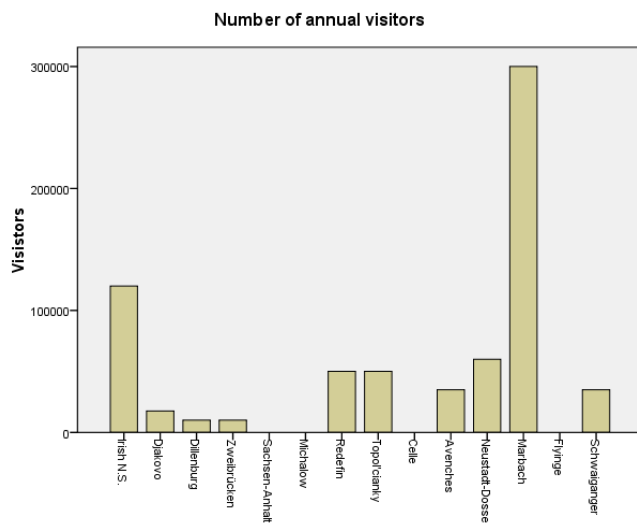
Most studs provide their website and info material in their national language and in English, studs in eastern countries like Slovenia, Slovakia, Hungary, etc. also provide German information. In Germany only a few studs provide information on their website in more than one language, e.g. Principal and Federal Stud Marbach and Neustadt-Dosse only provide information through their website in German.

Marketing and used marketing tools are very dependent on the financial annual turn-over which is visible by Federal Stud Celle which has the second highest turn-over and therefore also uses marketing tools like TV-reports.

3.8. Tourist/Visitors

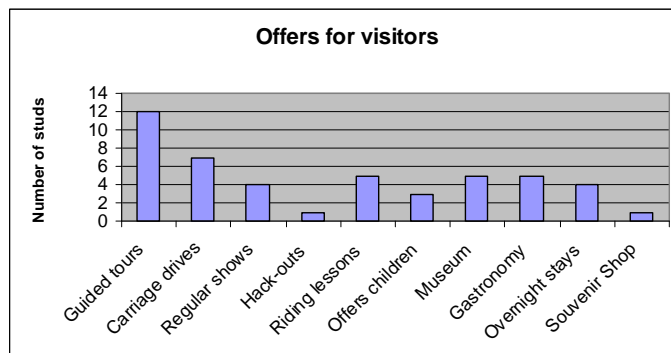
13 studs provided information about touristy aspects. The influence of tourist is different in each stud. 10 studs provided information on their annual number of visitors which varies between the studs from 10.000 up to 300.000 visitors per year (graph 4.8-1). 10 studs are freely accessible which indicates that these studs just estimated their numbers of visitors. In this case validity of results is questionable.

A correlation between numbers of visitors and the accessibility of studs could not be found.



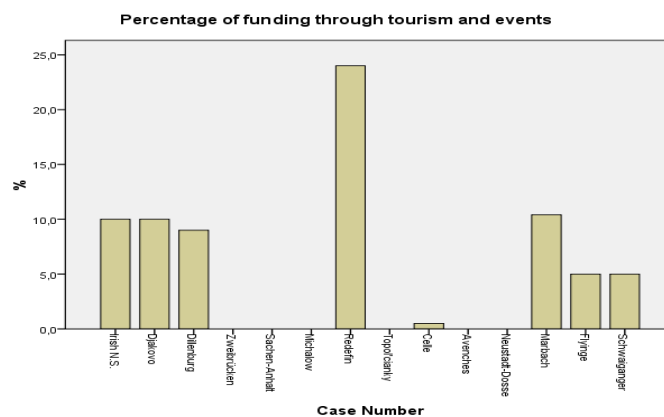
Graph 4.8-1 Annual number of visitors per stud (case 5, 6,9,13 - no input)

12 of 13 studs provide their visitors with guided tours, 7 with carriage drives and 5 with riding lessons, a museum and gastronomy as visible in graph 4.8-2



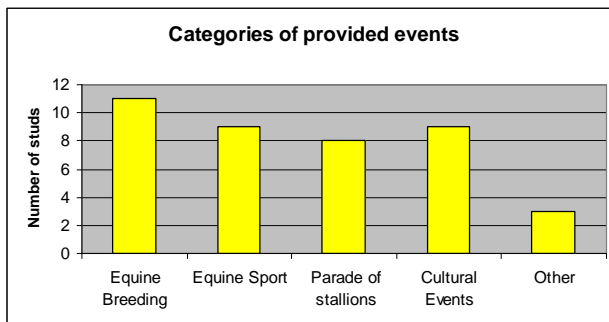
Graph 4.8-2 Studs' offers for visitors.

Tourist and visitors together with events provide for 8 studs a more or less important part of their funding (see graph 4.8-3)



Graph 4.8-3 Percentage of funding through tourism and events

Events are provided in the categories “equine breeding” by 11 studs, “equine sport” and “cultural events” by 9 studs (graph 4.8-4)



Graph 4.8-4 Categories of events provided by national studs

3.9. Education and Research

13 studs provided information on the topic further education courses and research thereof 11 studs provide such further education courses. 5 studs generate parts of their income through such courses. Swedish National stud Flyinge generates 52 % of its income through further education courses and Federal Stud Dillenburg 20% through tourism and further education courses.

Further education courses for external people are provided mainly in the fields Riding, Breeding and Keeping. Federal stud Dillenburg also offers special equine supported coaching seminars.

9 studs have course rooms available and overnight accommodation available. Also 9 studs cooperate with other institution namely universities, universities of applied science, national equestrian federation, equine sport and breeding associations, research institutes, riding schools, competence centres and agricultural department.

6 studs are currently involved in research projects and 8 studs of 12 would be interested in new research cooperation.

3.10. Cooperations

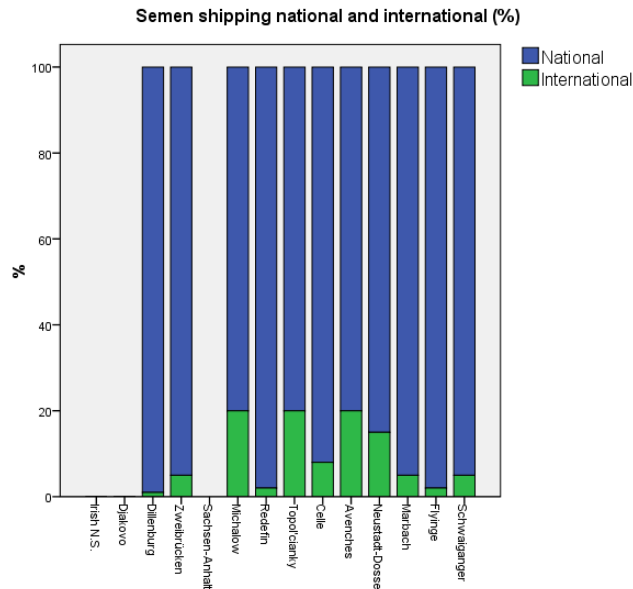
11 of 12 studs already have cooperations with other studs. Only the Irish National Stud does not maintain any cooperation with another stud.

12 of 13 studs also have close collaboration with other businesses and organisation mainly with breeding associations and private studs but also educational institutions, competition organizers, tourist associations and cultural institutions.

3.11. Special programmes and service

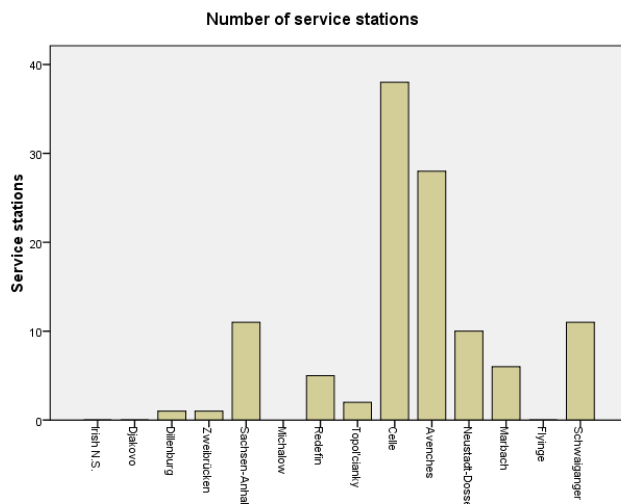
11 (N=13) studs provide their breeders with an EU-insemination station and 9 studs (N=14) provide the service of embryo transfer.

12 (N=14) studs do also ship semen national and international. Summing up the studs which do semen shipping 91 % of the total shipped semen is sent national and only 9% is sent international (see graph 4.11-1)



Graph 4.11-1 Percentage of national and international semen shipping

11 studs (N=13) run service stations in their countries next to their headquarters. Michalow did not provide information about service stations. A complete overview on the number of service stations throughout the country is given by the following graph 4.11-2. Michalow National Stud did not provide any information about service stations.



Graph 4.11-2 Number of service stations throughout the country (excluding Michalow)

4. Discussion

The first point to discuss is the sample used for this research. From 42 sent questionnaire into whole Europe 14 were received back and 8 are from German principal and federal studs. Therefore it is questionable if the sample is representative for whole Europe.

Additionally the questionnaires have not been totally completed by the 14 studs as it was already suspected. Studs completed all questions about their structure and personnel. Completely different were the questions about financials handled. Irish National stud, Djakovo and Marbach presented all details asked about their financial situation. Dillenburg, Redefin, Topolčianky, Celle, Avenches, Flyinge and Schwaiganger did not answer mostly part of financial balances and percentages of work fields. Zweibrücken, Sachsen-Anhalt, Michalow and Neustadt-Dosse did not provide any financial information. Michalow Stud only filled in the first 3 parts of the questionnaire, administration, horse breeding and keeping and infrastructure.

The fragmentary completion of the questions could have several reasons. First the questionnaire was large comprehensive and studs did not want to take the time to complete it. Second there was quite sensitive data asked and therefore studs did not have enough trust giving their data to a third party they do not know well enough. Dr. Astrid von Velsen-Zerweck pointed out that a lot of German state studs are not allowed to provide third parties with any financial detail by their government. Another reason could also be the competence of the person completing the questionnaire in terms of authority to decide or the availability of specific data.

There is also data given by nearly all studs about educational programmes, research and tourism. The gathered data will be used by ESSA – European State Studs Association as a database to make a knowledge and resource exchange between the studs easier.

4.1. Management Structure and Organisation

Actually there is the Irish National Stud, Zweibrücken, Michalow and Neustadt-Dosse which were never or not anymore owned by the state. The discussion about privatising or closing state studs is common topic. Just at this time the Swiss government is discussing the closing of Swiss National Stud Avenches due to shortcuts in governmental budgets. State studs are unfortunately often considered as needless by politicians therefore it leads to the conclusion of closing or privatising those institutions. For some studs like Neustadt-Dosse, Zweibrücken or Flyinge this might work because they are fund through foundations and/or by their own resources. It is probably very depending on the size, infrastructure and resources of such a stud. For example Marbach manages around 150 buildings which are almost all under preservation order. This means those buildings must be maintained and preserved which is a great expense. On the other hand privatised businesses are probably faster in their decision making process which could provide them with a healthy margin at the market compared to state owned businesses. But although Neustadt-Dosse has the legal statues of a foundation it is a foundation of public law and therefore indirect subordinated to the ministry of infrastructure and agriculture. Advantages of a foundation like Neustadt-Dosse and Flyinge is that they have better conditions and opportunities to apply for funds and subsidies especially EU-grants. Therefore state owned studs like Topolčianky or Redefin are more autonomous from the market through the subsidies of their ministries. But the controversy of this market autonomy is a limited freedom of action and decision making which again decelerates the state owned studs compared to their privately owned competitors.

Directors of each stud where asked to entitle their main assignment. There was no conformance between any studs regarding management assignment, each stud director defines its assignments differently. One should assume that at least the management of German state studs have the same assignments, but this is not the case. The explanation for this fact is simple, German government is divided into federal states which have own policies and therefore also different policies. The studs are

subordinated to the agricultural ministry of each federal state. The agricultural ministry assigns the studs' management according to its policies and emphases. Another explanation is that each stud is located in a different area or country, has another infrastructure, culture and tradition and therefore the management assignments are a little different between those studs.

4.2. Dependence on government

There can not be made a clear statement on the actual dependence of state stud on their government. Of course it becomes clear that state studs with the corporate structure of a foundation or limited liability company have no dependence on their governments only in terms of meeting regulations.

It is difficult to draw a valid conclusion for the dependence because it is strongly related to financial funds of a stud. But at the general assembly of ESSA 2010 at Neustadt-Dosse it was made very clear by the different stud members who have taken part that the governmental influence especially in terms of financial subsidies is huge. In quite a lot of European countries governments are still not stable and often change. With change of governments there is always a new debate about the necessity of state studs. Change in government often also means a change of management positions in the state studs, as example the stud Lipica in Slovenia had 10 different stud manager in 20 years.

4.3. Financials

The highest annual turnover with 7.0 million Euros is presented by Irish National stud. It is far higher than the average of 3.8 million which can be explained by the different equine industry in Ireland. Irish National Stud is breeding thoroughbred horses for racing. The racing industry generates far more turnover than Warmblood sport horse industry. Additionally Ireland has the highest gross domestic product with 140 per head (Eurostat, 2009) of all participating countries.

Swedish National Stud Flyinge has second highest annual turnover with 6.8 million. Sweden has a horse density of 28.1 (horses/1000 inhabitants) which is very high compared to Germany with 12.2 and Ireland with 16.2 (Haring, 2005). In total Sweden has an Equine sector turnover of 800 million Euro which would be 3.200 Euro per horse. In comparison the annual turnover per horse is 5000 Euro. This raises the question why the Swedish National Stud has such a high turn-over compared to the other studs. Flyinges' main financial income is made through the business branch "education". Therefore providing education must be Flyinges' key success factor.

Federal Stud Celle is generating 86.5 % of its income by covering fees. In total it has a turnover of 5 million Euro. Celle shows that it is possible to concentrate only on one business branch to generate enough funds.

Topolčianky is included in the four studs with the best turnover. Due to missing financial data key success factors of this stud are not directly identifiable. It can be assumed that the special breeds bred at the stud, especially Arabian Horses, and the broad offers of events and service lead to this success.

The differences in annual turnover between German studs can also be explained by the location of the studs. Celle is located in Lower Saxony which has with 24 horses per 1000 inhabitants the second highest horse density in Germany (Sachsen, 2008) and it is also the region where most horse breeding is done. Two of the three biggest horse societies, the Oldenburg Horse Breeders Society and Hanoverian Society, with together 28.233 registered mares are located in Lower Saxony (FN, 2009). In Baden-Wuerttemberg the horse density is about 13 and in Bavaria it is 15 and 19 in Mecklenburg-Vorpommern. It can be concluded that equine breeding industry in South and Eastern Germany is less profitable than in Western and North Germany. This is probably also the reason why the three studs Redefin, Marbach and Schwaiganger generate most of their own funds through tourism, events, horse selling and livery horses.

When looking at the main source of income it is surprisingly that state subsidies are the main fund of only four studs. Studs are able to generate a good income through their own branches of the business and not all of them are necessarily dependent on the state. This gets also visible when looking at the most significant field of work. Covering business is most important for three studs but the four other studs put their emphasis on tourism, education and the training and mediation of horses. By taking a closer look at the past of all those studs breeding business was always the main or often only field of interest. Nowadays there seems to be a trend of having additional business branches to generate enough income to improve the ability of sustaining at the market. As already mentioned before has the location of a stud also in important influence on the provided services next to horse breeding.

Although the main source of self generated income changed from breeding business to other business branches in many studs over time for Irish National Stud, Marbach, Flyinge and Schwaiganger the covering business is still the most significant work field. This is a very interesting fact because these four studs generate their main income through other business branches. Of course own breeding supports the horse sales but in this case tradition is probably the driving factor.

The further perspective in terms of financial income is especially in times of the world economics problematic. At present national governments have to support their economy too keep the countries' market stable. Therefore they try to save finances wherever possible and the benefit of governmental institutions is questioned. The equine industry is very small in most European countries therefore this is not the first sector to subsidies. This could result in decreased amount of state subsidies for the studs.

State studs have the mission to provide their breeders with best genetic breeding stallions for an affordable price. To support the breeding progress and healthiness of bloodlines studs often need to buy foreign stallions. But the market for good quality stallions is small and therefore the horses are expensive. A lot of private businesses, like Paul Schockemoehle in Germany, Stal Eurocommerce in the Netherlands and Blue Hors in Denmark, provide breeders with excellent stallions. Therefore it is very difficult for state studs to sustain at the breeding market. As a result state studs need to specialise in other business branches. As presented by the Swedish National Stud Flyinge it is possible to generate a sufficient income through the provision of educational programmes. Tourism and the organisation of events will also play an even more important role as it is now.

4.4. Extra service

Nowadays state studs have to sustain at the market next to private businesses. Private businesses are often smaller and need to concentrate only on a small part of the market therefore they can react quicker to changes in the sector. State studs have many different functions to fulfil. They have to act as a role model, need to provide modern horses but also preserve the traditional breeds, need to transfer knowledge, preserve traditions and traditional buildings, etc. and next to all that they have to sustain at the market. Therefore state studs extended their service next to the breeding business to improve attractiveness and probably have an extra source of income. All studs who take part in this research do rent out their premises combined with event organisation. State studs usually have a good infrastructure with all necessary resources and therefore it is easy to use those for events with little effort.

Consulting to topics like breeding, keeping, nutrition and business management is provided by 13 studs only Sachsen-Anhalt does not provide this service. As already mentioned state studs need to act as a role model therefore consulting is an important assignment of state studs and could help to improve breeding process, equine welfare and management. It is not clear why Sachsen-Anhalt does not provide the service of consulting although it is a state owned business. There are disadvantages in offering a consulting service. Consulting is time consuming and qualified staff is necessary to

give valid advice which is associated with high costs. On the other hand is it a great tool to present the competence of a stud which improves the reputation.

Further education courses are also a standard service. National studs have the suitable resources in terms of buildings, horses and competent personnel. As state studs are public institutions they should be accessible for visitors. Additionally state studs are most of the time historic monuments and therefore also attractive for visitors. So this leads to the conclusion that tourist offers are an extra service which studs need to provide to stay attractive but which is also an easy tool to make some profit.

4.5. Resources

The numbers of horses per employee vary greatly between studs. It is nearly impossible to compare those figures of different studs with each other because each stud has another infrastructure and other resources. Examples are different amount of wages between countries, other studs have more financial funds to employ more staff, etc. But when disregarding those aspects it could also be a great opportunity to learn from each other. Probably the studs with more horses per employee have other operating or keeping systems. Therefore it would be recommendable for state studs to start an exchange programme of employees so that studs can learn from each other.

According to an analysis of the German equine economy carried out in order of the FN (National Equine Federation) 3.3 horses result in two jobs. Compared to Sweden and the Netherlands this number seems impossible. In Sweden 25 horses and in Netherlands 33 horses provide on workplace (Häggbloom et al). Therefore the results of the German study should be doubtful because such a huge difference between Germany and the two countries Sweden and Netherlands can not be possible, even if the horse density is different in those countries. But taking the results of this study into account the German equine sector analysis is valid. According to the results German studs have an average of 4.4 horses providing one workplace. The total average of all studs taking part in this study is 3.6 horses for one workplace.

Federal Stud Dillenburg has most employees per horse. This is probably due to the main source of income and most significant work field "further education courses" the stud has, horse breeding is only done in addition.

When looking at the number of female employees at a stud Swedish National Stud Flyinge is the only stud which has more women employed than men. This result can be explained by the different culture and policy of Sweden. Swedish government emphasises gender equality and is the leading country in Europe in regards to this topic (Government offices of Sweden, 2010). Already in 2004 Sweden had women employment rate of 71% and in 2009 it is 70 % (Eurostat, 2010). Swedish National Stud Flyinge has a women employment rate of 69 % which meets there country average very closely. In Germany employment rate of women is 66 % (Eurostat, 2010) but principal and federal stud Schwaiganger only has a rate of 6 %. In average German studs have a women employment rate of only 40% which is far behind the national average. Irish National Stud has a women employment rate of 64 % which is 7% more than the national average (Eurostat, 2010). It is not known how this figures developed at national studs through past years but national figures show a huge trend in employing more women (Eurostat, 2010) which probably can also be assumed for state studs even if there women employment rate is less than national rate. Women employment rate is an indicator for modernisation of a business. There are several reasons possible why most studs still have a quite low women rate. First of all women still bear the risk of causing extra costs through pregnancy, secondly it is also dependent on the employee cycle which means the time an employee stays at the stud, the longer a male employee stays at the stud the more time goes by until this working place could be replaced by a women.

The advantage of a lot of operational land is that own feed production is possible if the land is not used for forestry. Enough land makes also keeping of horses easier

because in summer times horses can be kept outside on pastures and do not need to be fed by hand every day. The correlation between the size of operational land and the number of horses kept at a stud is a sign for equine welfare standards. The two studs Topolčianky and Marbach which have the most operational land also have the most horses. But the amount of operational land does not influence the factor of additional feed purchase. There is only National Stud Djakovo in Croatia which does not need to purchase any feedstuff. Production of own feed requires a lot of resources like machinery, employees and storage place.

Nowadays the prices for roughage and concentrates are quite high due to alternative energy generating systems. The own production of feedstuff gained importance again and national studs should carefully evaluate if own feed production would be more economically than purchasing it. Seasonal employees could be an option in this case.

Only the Irish National Stud, Djakovo, Zweibrücken and Michalow do not have to manage buildings which are under preservation order all others do. Having buildings which are under preservation order is associated with restrictions. From a negative point of view those buildings have higher maintenance costs and limited usage due to prohibitions of modifications. As positively evaluated can be the factor of tourist attraction and therefore a better income through visitors. Usually studs with buildings under preservation order get additional funds through governmental departments and through foundations. Alexandra Lotz, manager of ESSA and expert in buildings and conservation, confirmed that Principal and Federal Stud Marbach is supplied with a bigger amount of state subsidies than other studs in German due to the reason that the stud needs to maintain their 150 buildings which are nearly all under preservation order.

Welfare of horses is an increasingly important factor in the equine industry. This includes in first place keeping horses as natural as possible. Swiss government has regulations about minimum size of boxes and the time a horse needs to get free movement outside of two hours everyday (Schweizerische Eidgenossenschaft, 2009). Other countries governments get increasingly under pressure to intensify their regulations as well. As role model national studs should provide their horses with the most true to nature keeping systems as possible, but as results indicate this is still not the case. Unfortunately is the keeping of stallions in boxes still standard. The National Stud Djakovo even keeps their stallions in tie-stalls which are not allowed in the EU anymore since many years. Djakovo is situated in Croatia which is not an EU member yet. This could explain why there are still used tie-stalls for stallions. Avenches, Neustadt-Dosse, Marbach and Schwaiganger are more advanced in this case and provide their stallions at least partially with pastures. Schwaiganger keeps 90% of its stallions even in group-housing. There are two possible reasons why most studs still keep their stallion in boxes. The stallions stabled in boxes are easier to manage in terms of availability and most important the injury risk. Another factor is that state studs have traditional building where boxes already exist since several years. To modify those stable, paddocks and pastures would be cost-intensive.

The situation of keeping mares is different it probably depends on their usage and the season. At many studs mares are only at pastures in summer times other studs like Marbach keep their mares in boxes in times of foaling. Overall it can be concluded that mares are kept closer to nature than stallions.

4.6. Marketing

Today effective marketing tools are essential to compete at the market. The basic instrument of modern marketing is a website. Federal Stud Celle takes more marketing tools than other studs do. Celle generates its income through the covering business therefore the marketing of stallions has a high priority. In addition Celle has with its, compared to the other studs, high turnover also the financial resources to do effective marketing. Usage of marketing tools is strongly related to the budget a stud can and

wants to spend. Websites, leaflet, brochures are the basic equipment of studs. A stallion catalogue is also a basic tool to present and inform breeders. Books are only used by a few studs because they are elaborate and expensive in production. Marketing is also strongly related to the target group of a stud. It depends on the business branches and their significance. Breeders as well as tourists, cultural interested people and professionals need to be addressed. This study just asked basic information about the marketing tools of studs. A conclusion about the effectiveness of marketing can not be made in this case.

4.7. Tourism

Marbach is visited by 300.000 visitors each year which is far more than any of the other stud have. Marbach is located in a mountain area in South Germany called "Schwäbische Alb" which is tourist region for hikers and bikers with a lot of health resorts. Marbach is promoted by tourist guides and tourist information points of "Schwäbische Alb" which is probably the reason for the high number of visitors. Neustadt-Dosse is only one hour from German capital "Berlin" and an interesting place of excursion for horse and historic interested people. Redefin is close by to a natural park which also brings tourist in this region. Topol'čianky provides a lot of huge events in carriage driving which attracts visitors.

Guided tours and carriage drives are mainly offered to visitors by the studs. Guided tours need less effort and expenses, one person is usually enough to satisfy a whole group of people. Carriage drives are also easy to provide because necessary resources are available at the studs.

Only Topol'čianky is providing hack-outs for tourists. The risk of accidents during hack-outs is quite high. Horses and trainers need to be suitable and studs' insurance need to cover the risk of accidents. The effort of hack-outs is quite high when taking into account that horses need to be kept just for this purpose, this is probably the reason why this service is not offered by any of the other studs.

Redefin generates 25% of its funds through events and tourism. Marbach provides the same categories of events but only generates around 10%. Redefin has even less events than Marbach but Redefin has very high quality events which are interesting also for people outside the equine sector. Redefin provides music festivals, a lifestyle exhibition and an international CSI competition in collaboration with PST Paul Schockemöhle Marketing GmbH. Besides provides Redefin tourists with guest boxes for horses and overnight accommodations.

In terms of numbers of visitors Marbach is followed by the Irish National Stud with 120.000 visitors a year. To attract tourists the stud has Japanese gardens, a garden with woodland and lakeside walks and a horse museum.

Dillenburg and Zweibrücken have with 10.000 visitors the lowest result. Dillenburg only offers the usual guided tours no extra effort is put into further tourist "attractions".

Zweibrücken has next to a lot of breeding events also horse racing and a medieval spring market. For tourist guided tours, riding lessons and a special programme for children is offered. The events are quite unique and probably the biggest magnet point for visitors the stud has.

The quality of events is a key success factor in this business branch. To attract tourists the location of the stud and the uniqueness of offers next to horses is essential for success.

4.8. Research and Education

National Stud Flyinge does provide a complete educational programme. There are courses which are comparable to a usual apprenticeship and also course which end with a university diploma. Even a modern student accommodation is available. At this stud not the educational programmes support the breeding but breeding supports the education. It is total different approach and a huge amount of capital needs to be available to start up such a programme. Even there is not data available about the

income of the Principal and Federal Stud Neustadt-Dosse there is a comparable concept applied. Neustadt-Dosse provides usual school education in a residential school but with horse riding as a main subject.

Dillenburg generates 20% of income through further educational courses. The stud has a great offer of courses about riding, driving and ground work. Additionally personality coaching is provided. Those three studs have a clear and straight concept about education and made this education courses to their main business branch. If suitable funds should be raised through educational programmes a stud needs to concentrate completely on this branch otherwise it is not possible to be successful. The advantage of educational courses is that they generate a lot of turnover in quite a short time. The effort which needs to be put in the preparation of educational programmes is only huge in the beginning later on the content of those courses only need to be up-dated. Courses of courses which take several days require course rooms and overnight accommodations. For the studs Djakovo, Zweibrücken and Celle are educational programmes difficult to execute because they are missing the necessary facilities. This problem could be solved through cooperations with neighbouring hotels which could provide course rooms and beds as well as catering.

State studs are a great opportunity for researchers to conduct their studies because it is usually possible to get horses of different gender, age and condition at one place. As results show are most state studs also interested in research cooperations. Research is an important factor to improve breeding progress, health and welfare of horses which should be of interest to the studs. Only Sachsen-Anhalt, Redefin, Celle, Neustadt-Dosse, Marbach and Flyinge are currently involved in research projects. Of course such researches are most of the times connected to some effort the stud needs to make but the benefit of such studies can be great.

4.9. Cooperations

Michalow and Avenches did not provide information about cooperations with other studs. Irish national stud has no cooperations with other studs. The stud has enough financial resources to stay independent and is not dependent on an exchange of information or even does not want to share information and key success factors to the business.

The other 11 national studs do already have cooperations which indicate that those are helpful in terms of exchange of information, genetic material, semen shipping, stallion leasing, etc. There is even cooperation between Neustadt-Dosse, Dillenburg and Moritzburg to purchase a stallion. Cooperations between state studs do not have any disadvantage, studs can only profit. The example of Neustadt-Dosse, Dillenburg and Moritzburg shows that it is possible for studs to finance bigger projects, like purchasing a high quality stallion, if they put their funds together.

Zweibrücken does not have close collaboration with other businesses and institutions but with the data available there can not be made a plausible explanation for this fact. Close collaborations to other businesses and institutions are essential for the marketing and organisation of events and educational programmes. The standard collaborations are breeding societies.

4.10. Special programmes and service

The modernisation of studs is especially visible by the modern service offered to breeders. EU-insemination stations are becoming standard institutions at National Studs.

Irish National stud has no EU-station because the race horse company "Weatherbys" where horses of Irish National Stud are registered does only allow natural covering

(physical mounting) as common all over the world in the racehorse industry (Weatherbys, 2010)

Michalow, Topol'čianky and Avenches do most international semen shipping. Michalow and Topol'čianky have Pure Bred Arabians which have a good reputation all over the world and therefore the demand for semen of their stallions are international. Avenches has the rare and also threatened by extinction breed Freiburger with a small stallion population. But the main reason for the international semen shipping is that Swiss Warmblood stallion owners who market their stallion internationally station their stallions at the EU-insemination station in Avenches (Burger, 2009).

International semen shipping is strongly related to the breeds and the popularity of blood-lines as well as the marketing of state studs in other countries.

Dillenburg has the smallest percentage of international semen shipping probably because it does not have an EU-insemination station or blood-lines are not attractive enough for breeders from foreign countries.

The strong emphasis Celle puts on its covering business is also visible in the number of service stations Celle provides throughout its state. The high number of service stations of Avenches throughout whole Switzerland can be explained by the countryside of Switzerland. Switzerland is located in the Alps which complicates travelling. In this case it is far simpler to bring the stallions to the mares instead of bringing all the mares to the stallions.

In modern times travelling is made easier and semen can be send by post. Therefore fewer or even no service stations are need today than in the past. In times of semen shipping and artificial insemination the offer of service stations is an historic remain of the past and extra service national studs still provide to their breeders. The support of service stations is expensive because buildings must be maintained, stallions must be transported and at least one employee needs to be sent there as well. Therefore the future of service stations is doubtful especially if state subsidies for studs will be shortened.

4.11. Research limitations

This study was limited in its process because it was not considered that European state studs need more than four weeks to return the questionnaire. For further studies it is recommendable that studs are given at least eight weeks to return data. Additionally the return rate of questionnaires was low. Reasons for this could be that the questionnaire was too extensive, presenting the questionnaire in two languages was not enough to overcome language barriers or studs are not interested in taking part at this survey. Several stud taking part in the study were not willing to provide financial data which complicated the identification of key success factors and the efficiency and profitability of those studs.

For further research regarding an analysis of European state studs it is recommendable to make a personal visit at the studs otherwise it is difficult to get an impression of the mission and vision as well as the processes happening at the individual stud.

5. Recommendations

5.1. European State Studs

Result show that studs who concentrate on one business branch are able to generate more income like Celle and Flyinge. Studs like Flyinge, Dillenburg and Celle are already service providers. Therefore each state stud is recommended to evaluate its competences, resources and location to find a market niche which fits the stud best as far as this is in conformance with the superior ministry. The target group needs to be clearly defined and to address this target directly suitable marketing tools need to be selected. No recommendations are made for individual studs because this would go beyond the scope of this study.

In former times state studs had a powerful position in the breeding sector but nowadays private businesses dominate the breeding market. To sustain at this market cooperations between state studs are essential. The main advantage of performing cooperations are an exchange of knowledge, extension of the genetic pool and the corporate funding of projects which would not be affordable by one stud only. State studs could share information experiences with governmental institutions, how to apply for grants, successful events, etc. All this could make work flows easier, save time and generate additional funds which add up in more profit.

By planning events the results show that the quality and originality of events is the key factor to attract visitors and generate a significant income. It is also important to address a broad target group and not only equine interested people.

5.2. ESSA

A basic database about individual European state studs can be established with the gathered data of this analysis. But to develop the database further and to up-date it further studies are necessary. ESSA board meetings and general assemblies take place at different member studs. These gatherings can be used to analyse the individual studs further and get more detailed information.

The questionnaire set-up for this research will be made available to ESSA so that they are able to gather data about studs on their own. ESSA can then forward the questionnaire to new member studs which did not take part in this survey.

ESSA should also inform the stud members about the data base and the advantages of it. State studs just have to contact the institution ESSA to get detailed information about other studs which simplifies the exchange programme mentioned in chapter 6.1.

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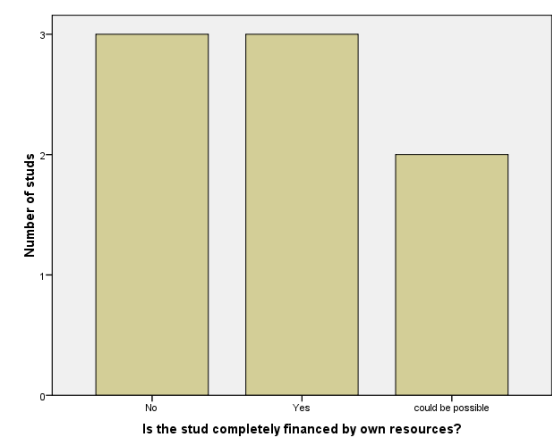
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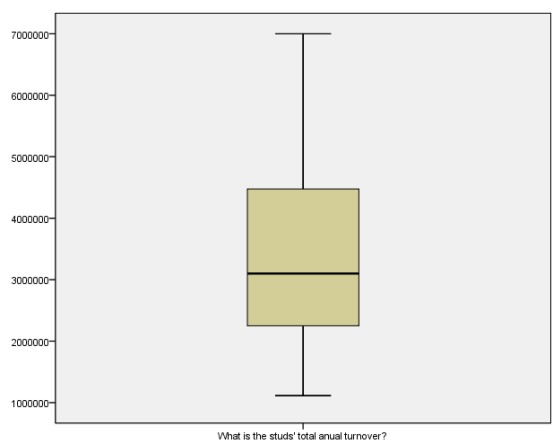
ANNEX I - Results

Graphs and Tables

Financials



Graph 1 Studs ability to finance themselves by own resources



Graph 2 Distribution of studs' annual turnover

Comparison Horses/Employees

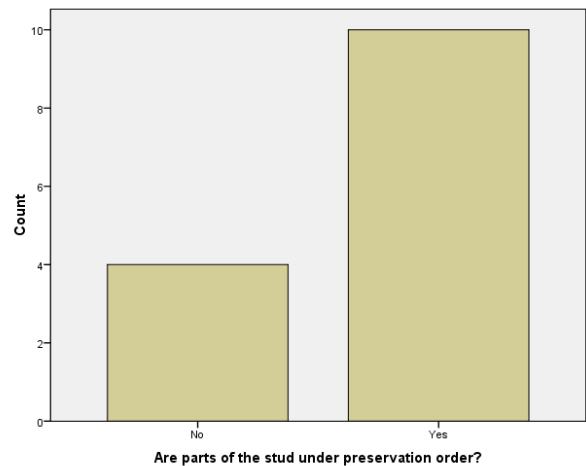
Correlations

		How many people does the stud employ in total?	Total number of horses kept at your stud?
How many people does the stud employ in total?	Pearson Correlation	1,000	,561*
	Sig. (2-tailed)		,046
	N	14,000	13
Total number of horses kept at your stud?	Pearson Correlation	,561*	1,000
	Sig. (2-tailed)	,046	
	N	13	13,000

*. Correlation is significant at the 0.05 level (2-tailed).

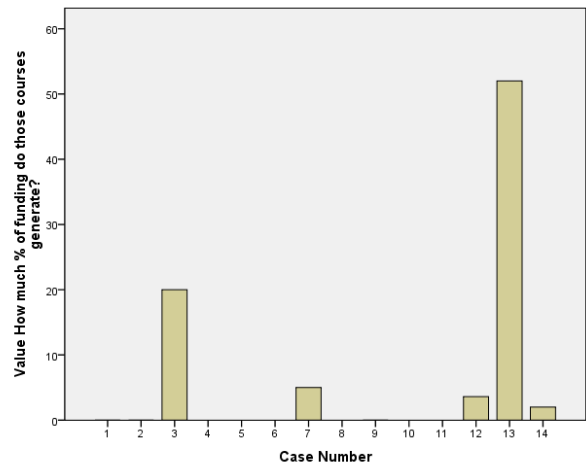
Table 3 Correlation between number of horses and employees

Resources



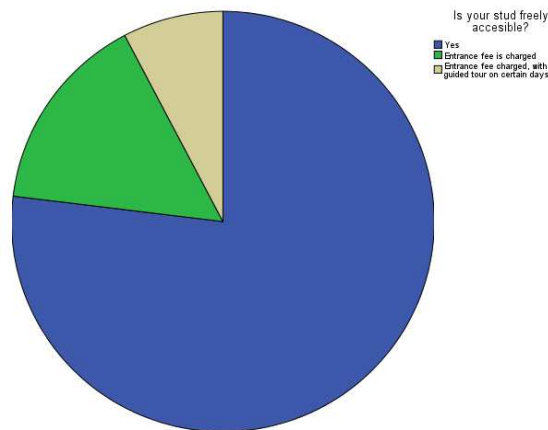
Graph 4 Number of studs with buildings under preservation order

Education and Research



Graph 5 Funding generated by further education courses

Toursim



Graph 6 Accessibility of studs

Correlations

		How many people are visiting your stud each year?	Is your stud freely accessible?
How many people are visiting your stud each year?	Pearson Correlation	1,000	-,075
	Sig. (2-tailed)	,836	
	N	10,000	10
Is your stud freely accessible?	Pearson Correlation	-,075	1,000
	Sig. (2-tailed)	,836	
	N	10	13,000

Table 7 Correlation between accessibility of studs and numbers of visitors

ANNEX II-Request for Research Proposal



Ausschreibung Forschungsarbeit:

Analyse der Strukturen und Tätigkeitsbereiche der europäischen Staatsgestüte

Die staatlichen Gestüte Europas stammen aus einer Zeit, in der das Pferd im Transportwesen, in der Landwirtschaft und für das Militär eine unverzichtbare Stellung einnahm. Heute sind die Gestüte sowohl wichtige Bewahrer von Tradition und Geschichte, als auch moderne Wirtschaftsunternehmen und Ausbildungsbetriebe. Sie sind lebendige Kulturerbestätten, die sich unter Beibehaltung ihrer traditionellen Werte weiterentwickeln müssen, um zukunftsfähig zu bleiben. Die Organisation der Gestüte variiert von Land zu Land, die Gestüte unterscheiden sich in ihren Verwaltungsstrukturen, ihrer Größe, den gezüchteten Pferderassen und ihren Tätigkeitsbereichen.

Zielsetzung:

Ziel der Arbeit ist die möglichst umfassende Analyse der einzelnen Gestüte in den Bereichen

- **Verwaltungsstruktur und Organisation,**
- **Pferdezucht und Pferdehaltung,**
- **Ausbildung und Forschung,**
- **Marketing, Kultur und Tourismus.**

Methodik:

1. Entwicklung eines Fragebogens, der von den einzelnen Mitgliedsgestüten auszufüllen ist
2. Auswertung der Fragebögen
3. Schlussfolgerungen

Ablauf:

Ausgabe der Arbeit: 4. Februar 2010

Präsentation
der Ergebnisse: 8./9. Juni 2010, ESSA-Mitgliederversammlung in Neustadt/Dosse

Koordination: Dr. Astrid von Velsen-Zerweck
und die Geschäftsstelle der ESSA im Haupt- und Landgestüt Marbach

Das Thema ist selbständig zu bearbeiten. Die Studentin erhält eine Liste der Gestüte und die Kontaktdaten von Ansprechpartnern vor Ort (soweit bekannt). Die Vorstellung der Forschungsergebnisse erfolgt am 8./9. Juni 2010 anlässlich der ESSA-Mitgliederversammlung im brandenburgischen Haupt- und Landgestüt Neustadt-Dosse. Reise- und Unterkunftskosten der Studentin trägt die ESSA. Die Ergebnisse der Analyse werden der ESSA für interne Zwecke und Veröffentlichungen zur Verfügung gestellt.

ANNEX III-Questionnaire



Analysis of Structures and Business Operating Areas of European State Studs

Administration

Structure

1. What is your corporate structure?

2. Which organisation or ministry are you subordinated?

3. What are the stud managements' main assignments?

- ---
- ---
- ---
- ---

4. Which service do you provide next to horse breeding? *(Multiple answers possible)*

- ☐ Horse training
- ☐ Livery horses (e.g. up-bringing/raising of youngsters, retired horses)
- ☐ Selling horses
- ☐ Renting out premises connected with event organisation
- ☐ Tourist offers (e.g. guided tours, carriage drive, rides)
- ☐ Consulting about topics like equine breeding, keeping, feeding and business management
- ☐ Further education courses
- ☐ Veterinary service
- ☐ Service of own workshops (e.g. saddlery, farrier)
- ☐ Research
- ☐ Other:



Personnel

5. How many people does the stud employ in total? _____
6. How many women work for the stud? _____
7. Division of employees according the studs' diverse fields of work *(please complete the following table)*

Field of Work	Number	Comments
Administration		
Stud management		
Secretary's office		
Marketing		
Tourism		
Human resource department		
Book Keeping		
Other		
Keeping of stallions		
Keeping of mares		
Up-bringing/livery horses		
Horse training		
Training/Seminars/Consulting		
Agriculture (Agriculture and Livestock farming)		
Workshops (e.g. saddlery, farrier)		
Veterinary service		
Research		
Other <i>(please specify)</i>		



8. Does your stud provide apprenticeships? (Length of training at least one year)

- ☐ No
☐ Yes, if yes: *(please complete following table)*

Profession	Number of apprenticeships
Riding/Carriage driving	
Farmer	
Farrier	
Saddler	
Other:	

Finance

9. What is the studs' total annual turnover?

10. What kind of funds does your business use to finance itself? (please complete following table, you can use the free space to fill in additional financial resources)

Financial Resource/Fund		Percentage	Comments
Equity capital/ Own resources	Horse sales		
	Livery horses		
	Events		
	Tourism		
	Education/Further training		
	Agricultural products		
State subsidies			
Support/Sponsorship association			
Sponsors and Contributors			
		100%	



11. Please estimate the significance and financial balance of your business' fields of work in percentage? (please complete following table, you can use the free space to fill in additional fields of work)

Field of work	Significance in percentage	Annual percentage of	
		Revenues	Expenses
Covering Business			
Up-bringing/Raising			
Horse sales			
Performace tests			
Tourism			
Events			
Training/Seminars/Education			
Training and mediation of breeding horses			
Research			
Consulting			
Veterianary Service			
Apprenticeship			
	100 %		



Horse Breeding and Keeping

12. Total number of horses kept at your stud: _____

13. Which breeds do you breed at your stud? *(Please complete following table)*

Breed	Number per Sex		Comments
	Stallions	Mares	

14. Is one or more of these breeds threatened by extinction?

☐ no

☐ yes, if yes which one(s)? _____

15. Average number of annually raised horses by own breeding: _____

16. Average number of annually raised external horses: _____

17. Number of other livery horses (retired horses, horses in training, etc.)? _____



18. How are your horses kept? (please mark with a cross where applicable, multiple answers possible)

	Stallions	Broodmares	Rearing/horses	Retired horses	Horses in training
Tie-stalls					
Box without paddock					
Box with paddock					
Loose-housing barn					
Free-range housing					
Pasturing, individual					
Pasturing in groups					

19. For which disciplines do you train your horses? (Please mark with a cross where applicable, multiple answers possible)

	Breeding stallions	Broodmares	Own horses trained for sale	External horses in training
Dressage				
Show Jumping				
Eventing				
Endurance				
Driving				
Agriculture/pulling				
Racing				
Trotting race				
Show training				
Leisure riding				

Comments:



20. Do your horses take part in performance tests and competitions? (please mark with a cross where applicable, multiple answers possible)

	Breeding stallions	Broodmares	Own horses trained for sale	External horses in training
Performance test				
Competition				

21. How many stallions are on covering service?

	Number
Own stallions	
Leased stallions	
Semen shipping	

22. Does the stud run service/stallion stations in the country during breeding season?

- ☐ No
☐ Yes, how many?: _____

23. Does your business have an EU-Insemination station?

- ☐ No
☐ Yes

24. How and to which percentage do you use your stallions for covering? (please complete following table)

Type of covering	Percentage
Insemination with Fresh semen	
Chilled semen	
Natural fertilization	
	100%

25. Do you ship semen national and international?

- ☐ No
☐ Yes, if yes: To which percentage? (please complete following table)

Semen shipping	Percentage
National	
International	
	100%



26. Number of annually covered mares through your stallions:

	Number of inseminated/covered external mares	Number of inseminated/covered own mares
Own stallions		
Leased stallions		
Shipped semen		

27. Do you do embryo transfer?

- ☐ No
☐ Yes

28. Does your stud run stud books?

- ☐ No, stud books are managed by: _____
☐ Yes

29. Is the stud responsible for the registration/identification of your horses?

- ☐ No, horse are registered by: _____
☐ Yes

Infrastructure

30. Studs' year of foundation: _____

31. Is your stud divided into different farms?

- ☐ No
☐ Yes, Number of farms: _____

32. How many buildings does the stud manage? _____

33. Are parts of the stud under preservation order?

- ☐ No
☐ Yes, namely: _____

34. Are parts of your stud protected by law?

- ☐ No
☐ Yes, namely: _____

35. Which and how many training facilities do you have to train your horses (*Please mark with a cross where applicable and fill in the number, multiple answers possible*)

X	Training facility	Number
	Indoor arena	
	Show-jumping outdoor arena	
	Dressage outdoor-arena	
	Driving arena	
	Lunging arena	
	Horse walker	
	Cross-country course	
	Racetrack	

36. Are there apartments for employees available?

- ☐ No
☐ Yes, Number: _____

37. How much hectare operational area does the stud have in total? _____

38. How is the effective area divided? *(please complete following table)*

Type of effective area	Hectare (ha)
Agricultural area	
Arable land	
Grassland	
Forest	
Other land	

39. Does your business do farming?

- ☐ No
- ☐ Yes, if yes: What is cultivated? *(multiple answers possible)*
- ☐ Grass
 - ☐ Grain
 - ☐ Specialised cultivation (e.g. hops, apples)
 - ☐ Other: _____

40. Does your business also do livestock farming?

- ☐ No
- ☐ Yes, if yes: What kind of livestock animals do you have? *(multiple answers possible)*
- ☐ Cattle Number: _____
 - ☐ Pigs Number: _____
 - ☐ Sheep Number: _____
 - ☐ Goats Number: _____
 - ☐ Other: _____

41. Do you need to purchase additional feedstuff?

- ☐ No
- ☐ Yes, if yes: Which one?
- ☐ roughage
 - ☐ concentrates



Education and Research

42. Do you offer regular trainings for your employees?

- ☐ No
☐ Yes, in the fields: _____

43. Do you regularly offer courses and further education for external people?

- ☐ No
☐ Yes, if yes in the fields:
☐ Riding
☐ Driving
☐ Breeding and keeping
☐ Other: _____

Please enclose your course plan!

44. Are there housing and course rooms available for course participants?

- ☐ No
☐ Yes, Number of accomodation: _____
 Number of course rooms: _____

45. Do you cooperate with other institutions in regard to education and further training?

- ☐ No
☐ Yes, with: _____

46. Are you interested in additional educational and further educational programmes?

- ☐ No
☐ Yes, in following topics: _____



47. Are there current research projects taking place at your stud?

- ☐ No
☐ Yes, namely: *(please complete following table)*

Topic	Project partner

48. Are you interested in new research cooperations?

- ☐ No
☐ Yes, in following topics:



Marketing, Culture und Tourism

49. Which media is used by your business? *(multiple answers possible)*

- ☐ Flyer/Brochures
- ☐ Stallion catalogue
- ☐ Website
- ☐ Books
- ☐ DVD
- ☐ Advertisements
- ☐ Radio advertising
- ☐ TV-report
- ☐ Other: _____

50. In which languages do you provide your publications?

51. Does your business organise events?

- ☐ No
- ☐ Yes

Please enclose your event calendar!

52. Please allocate your events to the following categories:

- ☐ Equine breeding
- ☐ Equine sport
- ☐ Parade of stallions
- ☐ Cultural events (music event, exhibition, etc.)
- ☐ Other: _____

53. How many people are visiting your stud each year? _____

54. Is your stud freely accessible? *(multiple answers possible)*

- ☐ Yes
- ☐ No, entrance fee is charged
- ☐ No, the stud can only be visited within a guided tour
- ☐ No, the stud is only open to visitors on certain days



55. Which offers do you have for visitors? *(multiple answers possible)*

- ☐ Guided tours
- ☐ Carriage drives
- ☐ Regular show programmes
- ☐ Rides/hack-outs
- ☐ Riding lessons
- ☐ Special offers for children
- ☐ Museum
- ☐ Gastronomy
- ☐ Overnight accommodations (e.g. Stud hotel)
- ☐ Other: _____



Cooperations

56. Do you already have cooperations with other studs?

- ☐ No
☐ Yes, namely: *(please complete following table)*

Cooperation partners	Field of cooperation

57. With which other businesses and organisations do you have close collaboration?
(multiple answers possible)

- ☐ Breeding associations
☐ Private studs
☐ Competition organizers
☐ Tourist associations
☐ Educational institutions
☐ Cultural institutions
☐ Other: _____

General Comments:

Thank you for your cooperation!