Advances in Animal Biosciences (2013), **4:s2**, pp 106–115 © The Animal Consortium 2013
doi:10.1017/S204047001300037X

advances in animal biosciences

Scenarios

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In this chapter, we present the four contrasting scenarios produced by the study, offering four possible images of the horse industry's future between now and 2030. Each scenario combines the microscenarios for each component: 'public expectations of horses and of equestrian and horse-racing activities', 'public policy and regulation', 'equestrianism and horseracing' and 'horse producer structure and strategy'.

The report incorporates the various segments that make up the horse industry as listed in the Figure 1 below.[1]

In order to address local realities, the study is completed by an account of each scenario's impacts on three regions with very different profiles:

Lower Normandy, which is home to France's largest horse population and a centre for breeding, racehorse training and riding. Cattle and horse breeding farms compete for access to agricultural land in this region.

Île-de-France, the main equestrian region in terms of the number of licensed riders, and main horseracing region in terms of the number of races organised every year. Land here is in great demand for urbanisation.

Languedoc Roussillon, a tourist region with strong cultural ties to horses and a strong link between horses and the land. The decline in ruminant breeding and viticulture is freeing up agricultural land.

The possible impacts of each scenario on the type of users, the horse population, employment, the distribution of horses and equestrian activities, and the environment and biodiversity are put forward at the end of each scenario.

Each scenario is presented as follows:

1. a summary;
2. a detailed history of the horse industry in 2030;
3. a regional account;
4. a table indicating socio-economic and environmental impacts.

The first two scenarios, 'Everyone on Horseback' and 'The High-Society Horse' are based on contrasting economic trends. In the first scenario, revived spending power encourages access to recreational activities, whereas in the second the ongoing economic crisis limits their access to certain populations. The two subsequent scenarios, 'The Civic Horse' and 'The Companion Horse', are based on social evolutions marked, in 'The Civic Horse', by priority to quality of life and solidarity, and in 'The Companion Horse' by a sharp increase in concerns for animal welfare.

Scenario 1 – Everyone on Horseback. Horses in the leisure market, buoyed by a wide variety of businesses

Summary of the scenario

After a period of gradual economic recovery, the middle classes' spending power has increased, finally enabling them to fulfil their desire to ride horses at any age and regardless of their level. The government no longer provides support directly to the industry, which has the economic autonomy to meet the diverse expectations of increasingly numerous users. Expansion of the equestrian recreation market has stimulated competition and encouraged diversity in equestrian activities to satisfy all riders, from the occasional tourist to the regular competitor. Furthermore, thanks to the success of marketing operations targeting young bettors, racing is flourishing and the PMU (Pari Mutuel Urbain) is Europe's leading horseracing betting operator. The boom in equestrian activity benefits the industry as a whole, but requires widespread professionalisation and significant efforts to reduce costs while still improving supply. In order to compete with the growing import of horses from abroad, new breeders have turned their production towards lower-cost horses bred for recreation rather than competition. In reaction, producers of top-quality horses are spurred into making better use of horses not selected for competition by orienting each animal at an early age towards a type of career. This new segmentation is based on the industry's organisation linking breeding to users' expectations. The production of the French horse breeding industry is once again favoured by riders and sought after on the international market.

In 2030

The economic revival has increased the middle classes' spending power, enabling them to make the most of their

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https://doi.org/10.1017/S204047001300037X Published online by Cambridge University Press



Figure 1 Segments of the horse industry.

free time. Leisure pursuits feature largely in French people's lives, and outdoor activities in particular are on the increase. As a result, the strong attraction for horses revealed in surveys at the end of the 2000s continues to grow and is satisfied for part of the population, generating a wide variety of available activities sustained by a wide variety of businesses. In 2030, horseriding is practised at all ages and all levels, once again attracting a male public. Leisure activities are developing considerably in urban, peri-urban and rural areas, without, however, being accessible to people from all income brackets.

In a totally liberalised market, the government no longer provides the industry with direct support, although it remains involved in monitoring health and hygiene. Nevertheless, the popularity of betting on horses and the fiscal revenues it generates encourage the government to retain control over racing through the long-established mutualist system, adopted at European Union (EU) level, and to return betting revenues to the industry, although at a reduced rate of 5% of the total bets placed.

To respond to the enthusiasm for riding, two types of specialised equestrian organisation coexist to meet the demand for recreation, games and diversity. Riding schools focus on teaching varied disciplines, giving lessons adapted to each type of client, and equestrian leisure centres are dedicated to teaching basic riding skills to enjoy activities on horseback. These businesses offer attractive rates and guarantee profitability by controlling production and operating costs, and expanding their client base. In addition to these businesses, independent riders gather in highly active organisations, especially with regard to developing riding trails. This benefits equestrian tourism, which has increased considerably since the late 2000s, particularly in rural areas. The market for amateur competitions and clubs is continually expanding with an ever-growing number of disciplines and all levels catered for. Harness racing and flat racing are also practised at amateur level, which enables high-level horses to prolong their careers. In contrast, very high-level competition becomes the remit of federations and remains focused on World Equestrian Games' disciplines. Innovations in competitions' staging and format have facilitated media coverage of major equestrian events to the extent that regional and national sporting competition finals are now paid admission events.

Over the last 20 years, the racing public has also grown, thanks to marketing targeting young bettors and a multiplication of the products on offer. The PMU is now the largest betting operator in Europe, and racing is flourishing. The new interest in horserace betting leads to a rise in prize-money sums and boosts investment in racehorses. It also allows racecourse networks to be consolidated by organising a wide variety of races adapted to different types of participants.

In this context, cities with a significant horseracing history invest in horses to enhance their tourist appeal. However, they are almost alone in encouraging the use of horses in town and funding the organisation of horse shows because of the high costs of such events. The consumption of horsemeat is so low that slaughtering in France, revived because of the need to control costs, is sufficient to cover demand.

Given the boom in equestrianism, new riders initially prefer to buy foreign horses better suited to their level and use than French horses. The discrepancy between supply and demand eventually spurs new breeders to enter the market for leisure horses. To do this, they turn towards a breeding model that minimises expenses, where the type of horse prevails over the notion of breed, except when it is possible to promote the specific advantages of a local breed in its natural environment. This dynamic encourages sport horse breeders to specialise in the production of very high-end horses and make better use of the horses not selected for high-level competition by determining their aptitudes early, building on an analysis of animals' genetic profiles and rearing them appropriately. They purchase semen on the international market that focuses on producing general sport horses in which brand prevails over breed. However, racehorse breeding generally remains the preserve of enthusiasts, for whom breeding may be a secondary activity.

https://doi.org/10.1017/S204047001300037X Published online by Cambridge University Press

In each breeding system, scientific and technical knowledge has become essential to optimise production according to individual obligations and choices concerning the types of animal produced, and adapting techniques to the system is therefore a key element in segmentation. As a result of the diverse demand, major players in the industry have created businesses offering services at every stage of buying a horse. This contributes significantly to making the French breeding industry competitive on the domestic as well as the international market.

Lower Normandy in 2030

The growing popularity of recreational riding confirms the equestrian pre-eminence of Lower Normandy, whose riding population increases every weekend with people from Île de France. Encouraged by the experience of hosting the 2014 World Equestrian Games, the region has established itself as a hub for equestrian sport events and has promoted Normandy as a breeding region. The development of diversified recreational riding facilities in parallel to breeding and sport horse training centres generates synergies but also occasionally rivalries, and can be a source of conflict between these culturally very different worlds. On account of the size of the recreational riding market, the cost-effective production of horses and ponies has increased and constitutes fierce competition for downgraded sport horses in addition to competition from foreign breeders of high-level horses. To meet this challenge, the sport segment has had to specialise and improve its profitability by rigorously selecting young horses before they enter competition training, thus limiting investment in animals with low potential. By necessity, but also to distinguish itself, sport horse breeding uses the latest advances in breeding technology and, as a result, employs technicians with both animal husbandry and equestrian skills. Some breeders finance these costly new practices through diversification, offering boarding for recreational horses.

Île de France in 2030

Despite the considerable growth in demand for equestrian activities among Île de France inhabitants, riding struggles to develop because of the intense land pressure and long commutes typical of the region. Establishing equestrian structures that are accessible by public transport – halted for a time because of fears the market had reached its ceiling – has become impossible, whereas facilities on the outskirts of Paris are in stiff competition with urban development and peri-urban agriculture. In the Greater Paris Region, strong demand means that riding activities are selected according to financial means. The desire to ride is satisfied largely outside the region; it mainly concerns urban residents with the means and/or opportunity to ride during holidays and weekends. In consequence, Île de France's equestrian centres have developed fast-learning formulas for occasional riders whose aim is to acquire the basic minimum skills to ride during the holidays. It has also opened the market for recreation and relaxation facilities located in the outer reaches of the region that offer families a variety of activities including riding and accommodation. Boarding and training of sport and racehorses are also moving to the region's periphery. Upkeep is far less costly here, yet it is still close to Île de France's large racecourses.

Languedoc Roussillon in 2030

The trends observed on a national scale are clearly visible in this tourist region, very dynamic from a demographic point of view, where owning a horse is a sign of attachment to local culture. People's passion for horses has accelerated the development of recreational riding in Languedoc Roussillon. All types of riding are practised here in varied and innovative structures to meet the demands of occasional riders of every level. Tourist activities that include a riding element, as well as boarding and instruction activities, are specialised, certified and organised into professional networks to offer quality service and distinguish themselves from non-professional actors. To satisfy this market, producers of draught horses have gradually turned their production towards recreational riding horses using local breeds that are well established, hardy and able to use difficult land. Local breeders use areas traditionally occupied by sheep and cattle, and a mixed livestock system is considered desirable. There is also a large horse population in lowland areas previously used for viticulture and now occupied by equestrian centres and privately owned horses.

'Everyone on Horseback' – impacts in France in 2030

Users	Clientele from the middle classes, all ages, men and women
Horses	● Numbers ↗↗↗ ● The horse is a medium for recreation ● Clear segmentation between recreation/sport/racing ● Considerable import followed by domestic procurement
Employment	● ↗↗↗ Employees and self-employed workers. ● Hospitality, instruction, activities, management

https://doi.org/10.1017/S204047001300037X Published online by Cambridge University Press

Distribution	• Tourist areas, in synergy with cultural, sport and nature activities; holiday destinations for urban dwellers. • Demographically dynamic regions whose development is limited by land pressure and transport times in the urban and peri-urban zones of large cities. • Regions breeding recreational riding horses create synergies but also rivalries with sport and racehorse breeding and training.
Environment, Biodiversity	• Animals retained in peri-urban areas • Rearing recreational horses that graze, creating value for land abandoned by agriculture, improvement of grassland biodiversity • Contribution to landscape quality • Market logic negative towards breeds of no immediate use

Scenario 2 – The High-Society Horse. Limited number of users in a socially divided society where natural resources are under pressure

Summary of the scenario

The lasting economic crisis has profoundly affected the middle classes, whose spending power has declined. In parallel, tensions over access to land and agricultural raw materials are driving up the cost of equestrian activities. The middle and working classes therefore choose more affordable recreational pursuits and riding is once again a social distinction, attracting a wealthy and exacting clientele. The most renowned and innovative equestrian centres have adapted to these customers who seek the atmosphere of an elite club. In contrast, economic difficulties encourage gambling, including betting on horses. The racing sector remains financially stable through levies on horserace bets, the use of modern technology and growth in international betting. Facing rising and already very high structural costs, racehorse trainers become owners and even breeders themselves, with harness racing nevertheless remaining more robust than flat racing. The meat sector disappears without finding an alternative use for draught horses. Breeding becomes more focused. In order to remain viable, riding horse breeders have been obliged to specialise and become more professional by producing elite sport horses selected at an earlier age on the basis of their potential; the others have abandoned the activity. As a result, better mastering of techniques and economics combined with an early career orientation for animals enables French horse breeders to establish themselves on international markets.

In 2030

In a climate of continuing economic crisis and tension over natural resources that affects agricultural land use and the cost of keeping animals, equestrian activities and, to an even greater extent, horse ownership, have become inaccessible for the middle classes. The economic crisis has, however, increased the popularity of gambling and betting. In this context, the French Government is primarily concerned with social and energy issues, refocusing its role in the horse industry to health and hygiene monitoring and no longer providing direct support for the industry's development. Nonetheless, to ensure the survival of an industry that earns it tax revenues, the government continues to supervise and regulate racetrack betting, returning 5% of bets taken by the PMU to the industry.

Equestrian activities, limited to an affluent clientele with high expectations regarding quality and variety, are extremely popular within this market segment; they combine novelty and excitement while offering comfort, luxury and made-to-measure services. In addition, riding has once again become a way to demonstrate social status, particularly by participating in high-level competitions, which attract the richest riders from virtually all over the world. Consequently, equestrian circles enjoy an atmosphere of elite clubs, attracting an increasingly male clientele, and media coverage of riding remains the preserve of connoisseurs at an international level. In parallel, top–end equestrian tourism has expanded in comparison with the late 2000s, enabling rich clients to explore France's heritage on horseback.

In this context where gaming and betting are popular, players choose games that offer the highest payout rates. Nevertheless, betting on horses remains stable thanks to the possibility of following races remotely and in real time on smartphones, and this has enabled the PMU to develop internationally and attract a younger clientele than in the past. Winners' prize money has remained at the same level as it was at the end of the 2000s, although the cost of keeping horses has risen considerably. Consequently, the number of passionate racehorse owners has declined. There are fewer than in 2010 on account of the difficulty in bearing exorbitant maintenance and care costs. Training activities move further away from large urban areas to reduce costs, and the idea of 'integration', traditionally seen in the harness racing sector, spreads to other types of race. A single stakeholder performs a number of functions, thus spreading financial risk across various activities and controlling costs more easily. Flat racing struggles to find a sufficient number of starting horses to remain at par with harness racing.

Alongside equestrian and horseracing activities, the development of animal traction services is limited by weak demand and above all by very high costs. Draught horses no longer have priority over ruminants that make more efficient use of available grassland; moreover, the consumption of horsemeat remains low, although value creation from culled horsemeat is often an economic necessity. As a result, certain breeds of draught horse are in danger of dying out.

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Breeding is strongly affected by pressure on land and the rising prices of agricultural raw materials. Racehorse breeders are compelled to become more profitable. The share of breeders who breed out of passion shrinks, and harness racing prevails over flat racing owing to its greater economic vigour. In addition to economic and land pressures, riding horse breeding is adversely affected by a shrinking market, leading to a drastic reduction in the number of breeding farms compared with the late 2000s; only specialised, professional breeders manage to survive. Their motivation remains the production of exceptional horses, but the possibility of orienting under-performing horses towards recreational riding remains. Early temperament analysis, combined with adapted rearing, allows most horses unsuited for high-level competition to be put to use and adapted to the needs of less experienced riders. Breeding has become less speculative and more realistic; all available techniques are used to produce, determine and create value from a breed of pan-European, or even global, sport horse. In particular, breeders have managed to benefit from advances in French research into animals' genetic profile analysis and are once again a step ahead of their European competitors. Marketing and selling products is facilitated by intermediaries recognised for their expertise and the quality of their horses. The intermediaries determine the relationship between breeders and users. For better or for worse, French breeding becomes competitive and claims back a share of the domestic market. Export constitutes a considerable portion of the market share and serves to maintain sport horse breeding.

Lower Normandy in 2030

Although the decline in the middle classes' spending power has a major impact on riding in the region, Lower Normandy is unevenly affected by land pressures. Equestrian activities are concentrated around tourist areas such as Deauville and peri-urban areas, whereas breeding has moved out to rural areas. The Lower Normandy horse industry weathers the crises because of its technical skill and the quality of its production, treatment and training facilities for high-quality, high-society horses for rich clients. Few passionate amateurs can still afford to keep animals and invest in their breeding and rearing, limiting the number of recreational and draught horses born. The breeding farms still in operation are specialised and of optimal size to improve their profitability, and the horses produced are exported. Some of these farms supplement their income by offering their services to breeders who do not have land, mostly to wealthy owners, particularly from Île de France.

Île de France in 2030

In Île de France, a region with acute land pressure and high prices, the economic crisis has had relatively little impact on large, well-established equestrian organisations, although it has altered the customer profile. Equestrian centres with the best competition results and most innovative services appeal to a public attracted by the 'exclusive' aspect of riding and the sporting challenge associated with it. Equestrian centres' prices in the Paris region are among the highest in France, which is essential for recruiting permanent, motivated and competent employees. It is also a sign of the elite popularity of riding even in a poor economic environment. New techniques and rising expectations mean that some equestrian centres lack the professional ability to adapt, and this leads to a regression in riding's democratisation. Horse owners, and more specifically racehorse owners, board their horses in stables outside Île de France and even beyond the neighbouring Oise département, where the price of land has become equally prohibitive.

Languedoc Roussillon in 2030

Languedoc Roussillon offers prices, a climate and a quality of life that, overall, enable it to overcome economic difficulties better by developing a clientele of French tourists affected by the ongoing recession. Trips abroad have become too expensive and many French people now choose to spend their holidays in France. The strong local attachment to horses has made them less preserved of the elite than elsewhere in France. The people of the region adapt to economic constraints by raising fewer, less costly and hardier animals, such as the Mérens breed. Equestrian centres created after the change in tax rates in 2005 never managed fully to establish themselves and many have not survived the crises that followed. Only the oldest organisations remain, with their professionalism and capacity to adapt already having been tested, as do those that have managed to innovate to meet the expectations of a less regular and more demanding clientele. Boarding has become too expensive, forcing owners to look after their horses themselves, team up with neighbours or find informal solutions. Because of the decline in equestrian activity, breeding farms are less numerous in mountainous areas, making it difficult to maintain the landscape there, given that cattle and sheep breeding are also on the decline.

'The High-Society Horse' – impacts in France in 2030

Users	Wealthy clientele, gender parity re-established Gamblers from the middle classes
Horses	• Numbers ↘ ↘ ↘ • Horses are a social marker • Specialisation – top-quality sport and racehorses • Dynamic export of top quality horses

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Employment	● ↘↘Employees ↗ Independent instructors ● Luxury industry training
Distribution	● Refocusing on tourist areas visited by the elite and areas specialising in high-level horses ● Very sharp decline in areas that were not specialised beforehand or that have little in the way of attraction. ● Breeding and training migrate to areas with less land pressure
Environment, Biodiversity	● Grassland transformed into cultivated land ● Less maintenance of some scrubland and marshland areas ● Decline in landscape quality ● Disappearance of draught horse breeds and some breeds of riding horse and pony

Scenario 3 – The Civic Horse. The horse in public and collective action, the link between humans, the land and nature

Summary of the scenario

In a context of globalisation and an accelerated pace of life, there is a growing desire to reconnect with nature and with other people. Local and regional public action is responding by backing initiatives promoting horse use to develop the economy, protect the environment, and contribute to individual and collective well-being. EU grants, decentralised national funding and the restitution of government racetrack betting levies (over which it again has a monopoly) enable contracts to be signed between municipalities and private and community-based equestrian businesses. Although riding for everyone is at the heart of these measures, using horses to maintain the landscape for farming, social and community services, hippotherapy, education and social inclusion is strongly encouraged. The most popular and profitable racecourses are incorporated into the approach to develop France's riding and horse sport heritage, and the others are forced to close. This multiplicity of uses allows horses to change career paths during the course of their lives, thus limiting the overall requirement for animals. The French market is essentially supplied by qualified French breeders who sell products adapted to the new demand through local networks, developing quality symbols and discipline aptitude certifications.

In 2030

Against this backdrop of globalisation and urbanisation, with life moving at a faster pace and the environment under more stress, the French express the need to live differently by getting closer to nature through their multi-belonging to various places. Great importance is given to balance and harmony among people, animals and nature, and this leads to new forms of cooperation reflecting greater solidarity. Horses are naturally part of this social trend, recognised and promoted for their numerous virtues in connection with personal development, social relations and, more widely, with developing and improving local land use. Moreover, local and regional public action incorporate horses as a resource in their own right, beneficial for the environment and, more generally, for society's well-being. Equine heritage is conserved and promoted by funding the development of educational, social, cultural and environmental services using horses. The move to use horses in such ways, implemented through contracts with local economic stakeholders and interaction with the community, has made horses a source of entertainment, improving the quality of life, as well as a vehicle to protect natural resources.

Although support to the industry has been transferred to regional authorities, the government remains involved by regulating horseracing. Once again, it has a monopoly on gambling to limit public health problems linked to addiction. It uses part of the tax revenue levied from betting to improve public health and channels the rest into local and regional organisations to finance social or public programmes encouraging the use of horses. To be consistent with such a policy, the government pledges to contain the growth of gambling. In return, the industry benefits from government levies on bets that return 8% of total bet value to support the sector whose development is otherwise hindered by the restrictions on racecourse betting.

As part of the endeavour to improve the quality of life, riding stands out from other educational and recreational activities through the relationship to animals, attracting people seeking interaction, enabling bonds to form among them and contributing to their well-being. Riders from all social classes now meet in equestrian centres, as do instructors and local inhabitants all in search of a sociable atmosphere and making new acquaintances, whether to break their solitude or to widen their family circle. They participate in organising equestrian events and enjoy attending sporting competitions, which may be rallies, shows or trials designed to entertain. In this context, far removed from high-level competition, top riders are mobilised to promote equestrianism and inspire the calling in others while trying to earn a living professionally. In order to meet public demand while diversifying their activities, some equestrian centres have specialised in school riding, rehabilitation or equine-facilitated learning. Like holidays in the countryside, equestrian tourism is hugely popular, combining contact with nature and exploring the country in a friendly atmosphere.

The role of local authorities in public action together with strong environmental and civic awareness create a highly favourable climate for using horses to maintain local grassland and for traction, especially in agriculture and in towns

https://doi.org/10.1017/S204047001300037X Published online by Cambridge University Press

where a new relationship between cars and animals is developing. A range of new occupations thus emerges based on activities combining specific skills with an excellent knowledge of horses. The multiplicity of horse uses means they can be assigned different tasks over their career, depending on the evolution of their aptitudes and their health. However, the important role of horses in society does not encourage their consumption and production for meat, and these sectors are gradually abandoned.

Society's need to disconnect from an overly virtual world makes horseracing the favourite gambling activity, especially because of the development of individual devices to follow races in real time, recreating the atmosphere of a racecourse. However, national regulation of betting maximums limits the amount of prize money awarded and the number of owners decreases; only rich owners remain, for whom owning and watching their horses race in France is a leisure activity. As a result, the activity is concentrated in the largest training centres and racecourses with the best technology and equipment.

The changes in racing make economically rational breeding necessary, and this is done by using tools and techniques, in particular early selection with new tools to analyse animals' genetic profiles, which improves profitability. Riding horse breeders must obtain a breeding licence and, as a result, have become more professional and are no longer in direct competition with private breeders. On the contrary, they offer their services to private individuals who choose to entrust the breeding of their mares to qualified professionals. This is done for a number of reasons, including for the animal's welfare and the opportunity to meet other owners as well as the rearing and sales services breed farms offer. These services are important because local breeding farms are near to buyers and serve as a guarantee for a good product. In response to the many possible uses for horses, the market relies on quality symbols and aptitude certificates given to horses for different types of use. As a result, horse selection focuses on the ease of use rather than performance, which allows French breeders to claim back a share of the market that was previously met by imports.

Lower Normandy in 2030

Lower Normandy, an agricultural region with medium-sized towns, is particularly sensitive to maintaining and developing activities that galvanise its rural areas. Local authorities support local agriculture and particularly the role of horses therein. Through their breeding, preparation and use, horses constitute a major asset for local areas in terms of land use, maintaining and beautifying landscapes and enhancing attractiveness to tourists. As the use of horses grows through, for example, riding in schools, use in tourist centres and events organised to promote local equestrian heritage, breeding and the industry as a whole adapt and become more professional to better meet the needs of local authorities. Moreover, the regulation of reproduction through breeding permits has stimulated the development of services offered by the most specialised breeders to horse owners who wish to breed their mares. Such diversification is, at times, essential for breed farms that remain exclusively dedicated to the production of sport or racehorses, the market for which is contracting. Breeding is forced to make better use of technology and become more cost-efficient. Breeding farms receive government support for training and employment, and are able to make use of municipal venues to exhibit horses to buyers, mostly from abroad, for which Normandy is France's showcase for horses.

Île de France in 2030

In Île de France, a region with a young and very dense population, priority is given above all to improving citizens' quality of life. To contribute to this, horses are used in a wide variety of ways, including social and health care, education, culture, social inclusion, safety, sport, tourism and environmental protection. Education and even re-education initiatives are developed using horses both in specialised centres and, more generally, equestrian centres, while the mounted police and local municipal services using traction increase the presence of horses in the city; they are organised and funded by local authorities, especially in municipalities with a racecourse through a high financial return on racecourse betting. This funding encourages access to riding for all populations, in particular children and teenagers from disadvantaged areas. This is a favourable climate for the employment of specialised staff trained in both equestrianism and social care. Nonetheless, these uses of horses imply the population's relative proximity to equestrian centres – retaining them in peri-urban or even urban areas is therefore encouraged in small facilities. For a long time, horses in Île de France were perceived as the preserve of the bourgeoisie, but they now convey an image of solidarity and citizenship.

Languedoc Roussillon in 2030

In Languedoc Roussillon, equestrian activities contribute to the region's appeal and help maintain the landscape with the decline of ruminant farming. Local authorities work together to fund diverse horse uses while encouraging their presence in traditional horse breeding areas. Popular equestrian activities, such as endurance, and traditional activities, such as working equitation, are encouraged by funding special breed farming and developing facilities for tourists. Observation of sites of interest for visitors is conducted on horseback, as are firewatch rounds in more remote areas. Horses are also widely used by municipal services in old towns with narrow streets that are inaccessible to lorries. Establishing breeding permits has encouraged many private owners to turn to collective organisations or professional breeders to breed their mares. This enables them to meet and talk in the convivial places that equestrian centres have become. Whether horses are used for transport in narrow streets, organic farming, to explore the Camargue and the Cathar country or to maintain mountain landscapes, they have demonstrated that they can adapt to very specific situations, as though they had been bred for such purposes. More so than ever, horses are a part of the region's cultural and natural heritage.

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'The Civic Horse' – impacts in France in 2030

Users	Varied beneficiaries from every social class
Horses	● Numbers ↗ ● The horse is a vehicle for social bonding and useful for society ● Horses guided towards, reared and adapted for specific and varied uses ● Procured locally
Employment	● ↗ employees and ↗↗ volunteers ● Bringing together multiple skills (psycho-social skills and knowledge of horses, public service and harnessing or riding, etc.)
Distribution	● Varying degrees of development depending on local projects, specificities and culture
Environment, Biodiversity	● Contributes to landscape quality and organic farming ● Maintains forests and grasslands, increasing plant biodiversity ● Reduces pollution by using horses on a municipal level ● Conservation of local breeds, seen as a valuable part of heritage and used in various ways

Scenario 4 – the companion horse. From exploiting to caring for animals – the quest for animal welfare

Summary of the scenario

Society's perception of nature and animals has evolved considerably over the last few decades. The horse has become a lifetime companion that people love to care for and respected in its own right. Owners visit equestrian centres to learn about horse behaviour and how to look after their horses, and are introduced to activities on foot or on horseback practised in competitions. In parallel, the population's concern for animal welfare has led to a ban on the consumption of horsemeat and regulations concerning equestrian practices have been tightened. As a result, owning and breeding are regulated while rules governing equestrian competitions and horse sports have been tightened to reduce animals' suffering. The racing sector, already transformed by the complete liberalisation of betting, has gone further, organising virtual races in parallel to real ones that take place on about 20 hi-tech racecourses integrated into casinos. Breeding horses is above all a leisure pursuit for private owners; nevertheless, some breeders who were previously passionate about performance now produce horses capable of long sporting careers and, at the same time, with specific aesthetic characteristics. A market for inactive horses has developed on the internet, meeting the growing demand for horses as companions. The horse population is ageing and is replaced very slowly.

In 2030

Over a few decades, society's perception of nature and animals has evolved considerably, and awareness of animal protection has grown accordingly. Horses – for a long time seen as work animals – have become lifetime companions that are admired and loved, whether ridden or harnessed, or whether caring for them constitutes the sole object of the relationship. This new relationship with horses is shaped by what they provide rather than the work they perform. People enter into the relationship by acquiring an animal for its own particular characteristics, or by the altruistic adoption of a horse at the end of its career. The presence of horses in a family environment strengthens bonds between generations and increases their popularity with a non-riding and largely female public, bringing them widespread media attention.

In view of this social trend, the government focuses its horse industry responsibility on monitoring health and hygiene and regulating horse-related activities. In order to limit possible ill-treatment of horses, buyers are obliged to undergo a short training course to obtain an ownership permit, and to declare horse ownership to a designated veterinarian. To own a horse, one must now be able to guarantee its permanent access to an outdoor area (weather permitting). Reproduction is also regulated through issuing breeding permits to sufficiently skilled candidates. In addition, stricter regulations limit the effort demanded of horses and the risks of accidents in racing and equestrian competitions. Breaking-in techniques, essential for using and even standing alongside a horse safely are regulated, and a minimum age has been established for animals to start working, racing or competing. The consumption of horsemeat has been banned. Having withdrawn from the industry's economic development, the government has chosen to completely liberalise racecourse betting and the PMU has been privatised.

When it is not a companion in daily life, the horse is occasionally a walking, travelling or adventure companion, fulfilling the equestrian dreams of most. Equestrian centres,

https://doi.org/10.1017/S204047001300037X Published online by Cambridge University Press

even if they still have their own horses, begin offering services to independent owners and, in addition to riding lessons, give lessons in hippology, horse care, treatment and natural horsemanship. New forms of competition have emerged, respecting the animal's welfare, and horse in hand competitions multiply. Although the intensity of the efforts demanded of horses is restricted, a high-level competition circuit remains. More generally, riding horses is no longer central to horse-related activities. Parks in which horses roam freely, almost wild, become common, encouraging, in some regions, the presence of typical local breeds linked to the social and cultural heritage.

There is a wide gulf between the horse lovers behind these initiatives and bettors who, given the very strict regulation of races, bet indifferently on all PMU gaming, whether horseracing or sport. To attract bettors, most racing events are held at ~20 hi-tech racecourses incorporated into casinos. Fearing a total ban on races, virtual racing develops in parallel.

Overall, the difficulty in parting with horses at the end of their careers or lives increases the population of old, inactive horses and those with no market value. Keeping these horses and eliminating them *post mortem* is costly, and limits the capacity to purchase or maintain a new horse. Owing to the lack of sale opportunities, breeding is largely a leisure pursuit. A level of production is maintained through foals born to mares owned by riders, and through riding horse breeding farms, which previously focused on performance and now seek to extend horse careers and improve aesthetics. However, breeders of local breeds strongly identified with a specific region and intended for specialised use continue their activity. To minimise costs and meet demand more adequately, the breeders themselves take charge of promoting and selling their horses. Internet transactions are popular, in particular for adoptions. As a result, the French market is largely domestic, except when horse enthusiasts seek particular aesthetic characteristics sometimes linked to a specific breed, in which case they may import.

Lower Normandy in 2030

In this region with a strong agricultural and grazing tradition, keeping companion horses is facilitated by the relative availability of land. However, with growing concern for animals' welfare changing notions of performance, this development has had a strong impact on horse production and, as a result, horse sales have fallen, in particular for sport and racehorses. Production has fallen because there are fewer potential buyers – who above all wish to keep their elderly horses – and because some breeders have lost interest in breeding now that the quest for performance is regulated by new criteria. Production is concentrated among the more specialised breeders, who are nonetheless more numerous in Lower Normandy than in most other regions. Many farms with pastures have converted to boarding retired horses, especially sport and racehorses at the end of their careers. The number of horses in the region thus remains stable quantitatively but at the expense of its potential for renewal. Racecourses host fewer and fewer races apart from the two main ones, but horse shows and festive events are organised there.

Île de France in 2030

The lack of space and acute land pressure thwart families' desire to be in close contact with horses. Nevertheless, the horse as a lifetime companion often exists, but it is boarded close to second homes, or with friends or family living in the country. The retreat of horses to outlying regions has become the norm, especially at the end of sport or racehorse careers. Horses remain only in certain 'pockets', at long-established equestrian or training centres that have held on to their urban properties and take advantage of their proximity to riders or racecourses. Local equestrian centres have become benchmarks in teaching horse behaviour and how to interact with them; instruction is offered for all levels, with specialised courses for different horse uses. The region has become expert in organising in-hand and riding competitions, which are often held at racecourses. The reduction in betting has led to races being concentrated at the largest Parisian racecourses, which have advanced technology and have adapted to increasingly strict animal protection regulations.

Languedoc Roussillon in 2030

Being able to own a horse is one of the region's attractions and many families allow themselves the pleasure of owning a horse. Despite the tradition and understanding of horses through working equitation, they are now increasingly considered as lifetime companions and the horse population is ageing, as it is elsewhere. As a result of the relative decline of farming, horses occupy land that has become available close to built-up areas, especially former vineyards. Horse boarding facilities take in retired horses in mountain areas following the reduction in sheep farming and the disappearance of draught horses that are no longer produced for meat. Some typical or specific disciplines have had to adapt to new regulations restricting the effort required of horses; this is the case for endurance and working equitation in particular. On the other hand, equestrian centres where children come mainly to care for horses are growing in number and popularity. The diversification of practices, gradually moving away from academic riding traditions, attracts relatively unskilled operators.

https://doi.org/10.1017/S204047001300037X Published online by Cambridge University Press

'The Companion Horse' – impacts in France in 2030

Users	Varied, mainly female public without distinctions of social class
Horses	● Numbers ↘ ● Above all, a sentimental relationship ● 'Love at first sight' horses chosen on the basis of aesthetics, temperament or dependable sport performance ● Local procurement and imports of horses with particular colours or characteristics (e.g. Appaloosas, Friesians, etc.)
Employment	● ↘Jobs in riding lessons ● ↘↘In racehorse training ● ↗Consultants for breeding/natural horsemanship/care and treatment ● ↗Veterinary services
Distribution	● All rural and peri-urban areas where pasture is available ● Sanctuaries for breeds in danger of extinction or for retired horses at the end of their lives
Environment, Biodiversity	● Grasslands maintained by horses at the end of their careers ● Conservation of breeds with special uses or characteristics (size, colour of coat, etc.)

https://doi.org/10.1017/S204047001300037X Published online by Cambridge University Press