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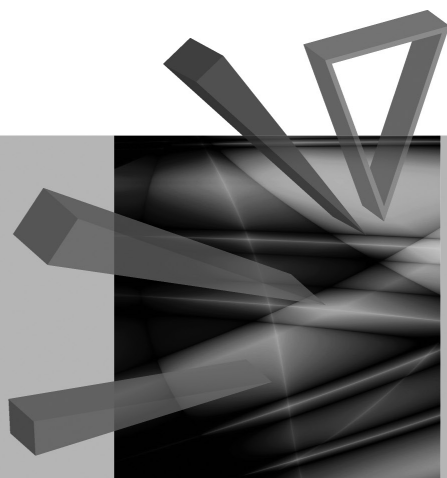
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# **Clusters, Networks and Markets in the Asia-Pacific Region**



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## **NETWORKS OF ECONOMIC ENTITIES RELATED TO HORSE RACING EXEMPLIFIED BY THE JAPAN RACING ASSOCIATION (JRA)**

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**Abstract:** The article presents the concept of horse racing from the angle of economic entities which are necessary for its proper and effective functioning and carrying out tasks connected with its development. The nature of created relations is a derivative of accepting the primacy of the good of the horse. The network is created by international organizations (e.g. IFHA), national organs and organizations (JRA), as well as numerous economic and social entities. An example of one of the best organized networks of economic entities within horse racing is the system created by the Japan Racing Association.

**Keywords:** horse racing, networks of economic entities, JRA, IFHA.

### **1. Introduction**

In the present days, horse racing creates a global network. It generates conditions for functioning of a large number of economic entities in the areas of production, services and flow of information. A prominent role here is played by the regulators, and among them international organizations and nations, creating a system of regulations facilitating its development. Functioning of a system of horse racing is dependent on many entities at the national and international level. They all create a network of connections, falling in line with functioning of modern global economy, not only through the scope of global influences, but also owing to the progressing process of internationalization of its participants.

The aim of this article is to present the economic entities creating the specific network within horse racing. An example illustrating one of the best organized systems of this kind in the world are horse races organized by the JRA, as an integral component of Japan's racing system and International Federation of Horseracing Authorities (IFHA). The article is based on literature review and empirical research conducted by the author since the year 2006.

## 2. Horse racing

“The main aim of the racing trial is to select the bravest of horses.”<sup>1</sup> Thus, the fundamental function of horse racing is selecting, from horses of a given breed, the best specimen to improve the genetic material. The basic types of horse races in the world are:

- flat racing – for Thoroughbred horses, Arabian horses, Half-blood horses and races for particular breeds (e.g. Quarter Horse);
- steeplechasing – racing over jumps (steeple or hurdles), point-to-point;
- harness racing – for Trotters and Pacers and particular breeds (e.g. Ban’ei);
- long-distance racing (endurance racing) – due to its specificity, often considered as a separate group of equestrian sports.

To carry them out effectively and efficiently, it is necessary to engage an adequate number of entities, for which the superior good will be the welfare of a horse. Among the basic elements characterizing the relations created within horse racing are: the care for safety of people dealing with horses, trust, primacy of quality, proper adaptation for purpose and needs, knowledge and skills of the clients. For this reason, relations established in this area are of long-term character, especially with regard to the obtained knowledge on the partner, which allows a better adaptation of the cooperation offer. However, such cooperation does not always mean remaining bound forever or exclusive. Therefore, besides trust and care for quality, an important element here are emotions and personal relations resulting from them. Each of the entities participating in this system is searching for solutions which will allow bringing it closer to market success, engaging properly selected entities and resources, creating a specific network of relations.

## 3. International Federation of Horseracing Authorities – IFHA

Depending on the conditions and type of the races, there are different systems of rules and technical conditions for compilation of “Race program.”<sup>2</sup> For this reason, an important element for development of a global racing system is international organizations, which are aimed to create conditions for development, as well as to popularize and standardize horse racing. In the year 1961, national racing organizations from the USA, France, Great Britain and Ireland reached a decision to create an international organization, aimed to organize, standardize and coordinate racing activities and improve the quality of breeding and selection of best Thoroughbred horses. The International Federation of Horseracing Authorities (IFHA) started its operations in the year 1993 and until this day it is the largest, although not the only, international racing organization of a global range.

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<sup>1</sup> W. Pruski, J. Grabowski, S. Chuch, *Hodowla koni* [Horse Breeding], Powszechnie Wydawnictwo Rolnicze i Leśne, Warszawa 2006, p. 478.

<sup>2</sup> It is a document containing conditions and rules for conducting particular races, along with information of horses, riders, trainers and racing stables.

Globalization of horse racing is influenced by keeping Stud Books which constitute a highly standardized and regulated system of international registration. Horses (stallions, mares, foals) meeting standards determined by the IFHA are entered into the books. They are the basis for conducting economic activities connected to sales, leasing (lending) and breeding. The breeding system is a vast branch of the horse industry, employing thousands of people. Racing also brings significant income to national systems, in the form of taxes from: employed, different types of bets, financial turnover, profits of racing tracks and entities connected to them, e.g. only mutual betting constitute around 7 billion euro in taxes every year.

All legally made bets fall under national regulations and those of proper international and regional organizations. Based on IFHA data it is estimated that an average of over 8% of the turnover on betting on horse racing is the income to the national and local budgets.

**Table 1.** Turnover of betting on Thoroughbred racing in selected countries in the years 2007–2011 (in millions of euro)

Country	2007	2008	2009	2010	2011
Australia	5 568,00	6 233,00	8 916,00	11 216,00	11 309,00
France	9 035,00	9 465,00	9 484,00	9 502,00	9 920,00
Hong Kong	no data	6 118,00	6 603,00	7 702,00	8 566,00
Ireland	3 992,00	3 905,00	3 286,00	3 260,00	2 868,00
Japan	19 033,00	24 692,00	22 092,00	25 435,00	26 032,00
Korea	4 672,00	4 030,00	4 034,00	4 442,00	4 528,00
Singapore	927,00	1 053,00	1 083,00	1 142,00	1 064,00
USA	9 998,00	9 799,00	8 547,00	8 539,00	8 324,00

Source: own elaboration based on *Wagering Betting Statistics*, IFHA, 2007–2011, <http://www.ifhaonline.org/wageringDisplay.asp?section=4i>.

According to the IFHA statistics, there is a race starting in the world every three minutes. Every year, there are about 150 thousand races for Thoroughbred horses. These races are registered and conducted according to the IFHA standards. However, it should be noted that the number of races registered at the IFHA is supplemented with regional and local races which are not reported to the organization's statistics, as well as races for horses of other breeds (including Arabian horse racing).

#### 4. Network of economic entities connected to horse racing

Besides international organizations, an important role in the creation of the system for regulating horse racing is played by the state and national institutions. Organization of horse racing systems in different countries is a derivative of legislation adopted in the area of tasks of the state and its dependent units in the field connected most of all

to organization of breeding and reproduction of farm animals, maintaining biological diversity and welfare, and sustainable development. Responsible for the implementation of the tasks connected to the state's supervision over the system of horse racing is, in general, the Minister of Agriculture or his counterpart. For current coordination and control of the functioning of units connected to organization and implementation of tasks in the area of horse racing, national units are appointed. The state influences the horse racing system also by cooperation with national institutions and organizations. A prominent role is played by the cooperation leading to creating policies for support and development of not only the racing, but also other activities, for example breeding and education.

A special area of the national regulations is the betting system. It is not only an element of entertainment accompanying horse racing, but it also generates significant income to the national budget or the budgets of local authorities. Most commonly it is based on mutual betting – either pool betting or fixed odds betting. Conducting such activities falls under licensing which is aimed to ensure proper control and prevention of criminality. Besides licensing costs and taxation on the business activity, also the bets are taxed – both, the amount staked and the winnings. Development of data communications system made it possible for the betting-men to participate in the bets not only at stationary points of sales, but also through telephone and Internet systems.

The basic entity creating horse racing system are racing tracks. These are green areas, most commonly located in large cities or in the suburban areas, equipped with infrastructure and grounds for conducting their basic activities – horse racing and numerous accompanying undertakings. The entities managing racing tracks are most often obliged to conduct cultural, sports, recreational and rehabilitational activities, including among other things: organizing horse races, conducting stationary training for horses and organizing sports events. Accounted for basic operations are also organizing and conducting recreational activities and active rest. The hippodromes also conduct accessory activities which include organizing exhibitions and auctions, stationary activities for children, youth and organized groups, fetes and picnics during sports and racing events, as well as mass and closed (e.g. corporate) events. Other accessory activities include providing services, and especially renting mechanical equipment, leasing of accommodations and using owned assets for other services, not colliding with the basic activity. Besides the equestrian area, also developed are gastronomic and entertainment activities and cooperation with educational and research units. For this reason, cooperation with numerous sub-contractors is an essential and indispensable element of efficient functioning of the racing tracks.

Due to the specifics of operating in the field of horse breeding, it is necessary to create appropriate relations with suppliers, ensuring proper functioning of the racing track. Among the entities, with which racing tracks cooperate, we should list:



organizers of mutual betting and mass media, where more and more popular are the electronic media, providing current and inexpensive access to information. An important element of this system, due to the international regulations, are anti-doping laboratories. Conducting drug tests is the duty of every organizer of horse races registered in the international system. Because of a large number of spectators, horse races are mass events which require securing in accordance with the laws in force. This results in the need to enter into cooperation with medical, security (people and property) and cleaning services, as well as the fire department, city guards and the police.

Among basic goods essential for proper fulfilment of the racing undertakings are: subsoil, feeds, bedding, elements of small architecture, software, hardware, farming equipment and tools, components necessary to maintain the green areas, materials for current repairs. A particular role here is played by the suppliers of feeds and bedding materials. Since they are both seasonal, it is necessary to sign contracts with delivery dates set in the future. Although many stables have their own warehousing facilities, not many of them generate reserves for an entire season (until next harvest). The demand for feeds and bedding of different types is an element which changes in time and thus requires maintaining contacts with numerous suppliers. Especially, since providing suitable stalls, feeds and bedding is the duty of the organizer of the races.

Another important role is played by suppliers of horse racing equipment. It is significantly different from classical equestrian equipment and most often it is custom made. Harness racing requires sulkies, which are manufactured by specialized craftsmen shops. A separate group of suppliers are producers of clothing for riders. On the market, there are many international clothing brands which make special lines of clothing for people connected to horses. Especially important for the riders is membership to clubs which in agreement with local clothing producers create own lines of clothing in club colours. Owning such clothing is an element of prestige. Also in case of “clothing” for horses, these may be bought in equestrian shops which offer a broad choice of all types of goods needed in the horse industry. Similar to riders’ clothing, these may also be individualized by ordering from a local producer.

Among services necessary for efficient and effective operations of racing tracks, we may list the following services: administrative and IT, financial and insurance, printing, veterinarian, farrier, judging, harness-making, transportation, gastronomy, hotel, entertainment, laundry, repair, tailor and waste removal.

Engaging a large number of different types of economic entities in functioning of horse racing causes the development of horse racing to positively influence the development of the entire system of subcontractors. This is reflected not only in national economic statistics, connected to the value and intensity of generated flows, but also in the increase in the degree of internationalization of all participants of this system.

## 5. Horse racing in Japan

The key elements of Japanese horse racing system are races organized by Japan Racing Association (JRA), constituting a national system of horse races, based on Thoroughbred horses. Complementary to JRA operations is the National Association of Racing (NAR)<sup>3</sup> which is an association of local authorities organizing local races for purebred horses: Thoroughbred and Arabian, as well as Anglo-Arabs, and horses of local breed – Ban'ei. Selected parameters characterizing JRA and NAR are presented in Table 2.

**Table 2.** List of selected parameters of Japan Racing Association and National Association of Racing

Parameter	Japan Racing Association JRA	National Association of Racing NAR
Number of racing tracks	10	19
Number of registered horses	8 222	8 944
Racing days	288	1469
Number of races	3 452	15 963
Current number of starters	10 998	13 626
Total number of starters	50 215	154 054
Average number of starters	14,5	9,7
Average number of races per horse	4,6	11,3
Number of horse owners	2 343	5 449
Number of trainers	221	560
Number of assistant trainers	1 167	54
Number of jockeys	161	331
Number of horse grooms	1 599	2 582

Source: own elaboration based on: Japan Racing Association, *Horse Racing in Japan 2009–2010*, 2011, pp. 2–20.

The basic entities directly creating the Japanese system of horse races are: racing tracks, training centres, veterinary hospitals for horses, equestrian parks, equestrian schools, breeding centres, yearlings farms, the media, shops and retail and entertainment centres, as well as suppliers and service providers connected to operations of these entities.

## 6. Japan Racing Association (JRA)

The JRA was established in 1954 as an entity integrating horse races, the breeding system and institutions and organizations influencing the development of races for Thoroughbred horses in Japan. The JRA is a horse racing operator under the

<sup>3</sup> *A Guide to JRA Racine King of Sport*, 32<sup>nd</sup> Asian Racing Conference, ARC Tokyo 2008, pp. 19–32.

supervision of the Ministry of Agriculture, Forestry and Fisheries.<sup>4</sup> Among its basic tasks are: planning, organizing and coordinating all actions and entities connected to horse racing, handling the betting system and managing horse racing tracks and equipment. It is responsible, among other things, for systems for registration of horses and their owners, granting licenses to judges, trainers and jockeys, as well as permissions for assistant trainers and grooms. The JRA is one of the largest national racing organizations participating in the IFHA system.

**Table 3.** Japan Racing Association annual statistics 2008–2011

Year	Racing days	Races run	No. of Starters	Prize Money (in thousands of JPY)	Net Betting (in thousands of JPY)	
					On course	Off course
2011	288	3 453	48 967	103 851 928	157 720 299	2 141 343 522
2010	288	3 454	49 895	106 586 793	172 679 485	2 262 947 043
2009	288	3 453	50 317	108 540 183	193 685 904	2 598 259 461
2008	288	3 452	50 215	110 584 477	207 732 651	2 756 297 660

Source: own elaboration based on: Japan Racing Association, *Annual Report*, 2008, 2009, 2010, 2011.

The basic elements of the JRA system are racing tracks: Tokyo, Nakayama, Kyoto and Hanshin, which are the so-called “big four”, and the remaining tracks are: Sapporo, Hakodate, Fukushima, Niigata, Chukyo and Kokura. All racing establishments are accompanied by equestrian parks. The oldest one was established in 1940 in Setagaya Tokyo. In these parks equestrian activities are held and also shows are prepared, which are an integral element of racing days program.

The horses racing on JRA tracks must be registered in Stud Books and trained at Training Centres at Miho or Ritto. There are specialized veterinarian hospitals for race horses at the Training Centres, which not only provide health care for the horses, but also conduct research on training systems, breeding, transportation, studies on horse diseases (prevention and curing), and rehabilitation system. All veterinarians taking care of horses on racing tracks, before starting their practice, must accomplish training at these hospitals.

In the Japanese system, an important element are also the training farms for yearlings, where preliminary selection of horses takes place. The JRA runs such farms at Nishicha (Hidaka Training and Research Center) on the island of Hokkaido and at Miyazaki (Miyazaki Yearling Training Farm) on Kyushu island. In 1959 the Equine Research Institute was established, dealing with research and development. Elements of this system are also the Laboratory of Racing Chemistry, Japan Society of Equine Science and Japan Farriers Association, which are responsible for

<sup>4</sup> <http://japanracing.jp/en/jpn-racing/jra/structure.html> (retrieved 19.02.2013).

conducting research on horse development and watching over their condition. They conduct numerous scientific researches and cooperate with other entities on the development of horse racing, breeding and usage systems.

However, the true foundation of the racing system in Japan are 52 breeding farms<sup>5</sup> cooperating with the JRA. Although the number of foals born there dropped from 8,205 in 1998 to 7,516 in 2007, and even to 6,674 in 2010,<sup>6</sup> their quality grew significantly as the result of functioning of the system, which is confirmed by the growing number of horses from Japan winning in international races. The group of entities connected with breeding and system of registration and trading of horses also includes: Japan Bloodhorse Breeders' Association (JBBA), Hidaka Horse Breeders' Association (HBA), Hidaka-Higashi Agricultural Cooperative Association, Japan Racing Horse Association, Japan Association for International Racing and Stud Book (JAIRS).

A racing-profiled equestrian school was established in 1982 in Shiroi. At this school, future employees of racing tracks and associated entities gain education in different professions. The most prestigious is the specialization for riders – future jockeys. The Equine Cultural Affairs Foundation of Japan and Japan Equine Affairs Association are also part of the education system. Both were created to promote equine culture and set foundations for social and professional development of the racing system. They deal with, among other things, creating educational programs, conducting research on relations between horses and people, conducting museum and training centres, both stationary and in the form of educational events.

The JRA conducts a wide-spread promotional action, involving stores offering equestrian products at largest shopping centres in Tokyo and Osaka – “Plaza Equus” and “Gate J”. The stores offer not only equestrian equipment and accessories, special lines of clothing for people and attire for horses, but also films, books and all kinds of gadgets. In each store, one can watch some films and participate in lectures and shows. Another element of the promotion, not only for horse racing, but the entire horse industry is the Green Channel airing since 1994 and jar.jp website which was launched in 2005. Also, The Equine Museum of Japan, opened in 1977 at Yokohama City proved to be so popular, that in 1991 JRA Racing Museum was opened in Tokyo. Both institutions are an element of not only promotion, but most of all establishing a culture of the horse industry, and especially a reminder of the essence of relations between people and horses.

Another important area of the JRA's operations is cooperation with entities representing the equestrian system, which are not only entertainment-oriented Equestrian Parks, but most of all the Japan Equestrian Federation (JEF) and the National Riding Club Association of Japan.

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<sup>5</sup> [www.directoryoftheturf.com](http://www.directoryoftheturf.com) (retrieved 4.04.2011).

<sup>6</sup> The number of registered foals by place of birth, [www.studbook.jp](http://www.studbook.jp) (retrieved 15.02.2011).

Like every economic network in horse racing, the JRA would not be able to operate without suppliers and service providers connected to current operating system. Among the specialized entities we should list the Japan Horse Transport (JHT), which concentrates on the transportation of horses – mainly race horses – across the country. Mainly, JHT is responsible for carrying horses based in Miho Training Center to races held by the JRA and local races (operated by the National Association of Racing). JHT offers about 90 horse vans and executes the majority of transportation connected to horse racing in Japan.

## 7. Conclusion

Based on the conducted research, it can be stated that horse racing integrates operations of a large number of entities. Due to their nature, the entities create specific relations, based on conditions resulting from accepting the assumption of superiority of the good of the horse over any other element. The regulators in this system are international organizations and national institutions and organizations, setting standards and framework of functioning for their members. One of the examples of best organized system is the JRA, creating the most efficient and effective network of entities connected to horse racing. Proper engagement of such a numerous group of entities and effective coordination of their operations brings not only economic effects, but also social and cultural effects and, most of all, influences the breeding advancement.

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## **SIECI PODMIOTÓW GOSPODARCZYCH WYŚCIGÓW KONNYCH NA PRZYKŁADZIE JAPAN RACING ASSOCIATION (JRA)**

**Streszczenie:** W artykule przedstawiono koncepcję wyścigów konnych przez pryzmat sieci podmiotów gospodarczych, które są potrzebne dla jej prawidłowego i efektywnego funkcjonowania, a także realizowania zadań związanych z ich rozwojem. Specyfika tworzonych relacji jest pochodną przyjęcia prymatu dobra konia. Sieć tworzona jest zarówno przez organizacje międzynarodowe (np. IFHA), organy państwa i organizacje krajowe (JRA) jak i wiele podmiotów gospodarczych i społecznych. Przykładem jednej z najlepiej zorganizowanych sieci podmiotów gospodarczych w ramach wyścigów konnych jest system stworzony przez Japan Racing Association.

**Słowa kluczowe:** wyścigi konne, sieci podmiotów gospodarczych, JRA, IFHA.