October 30, 2011

To Whom It May Concern:

In August 2010, I was asked by Dr. Niels van Elk of Dolfinarium Harderwijk, Netherlands, to provide expert advice on the releasability of the rescued killer whale known as ‘Morgan’. My opinion, submitted in early November 2010, was that although rehabilitation to the wild would be desirable, there was a low probability that this could be achieved successfully with this whale. This opinion was based on numerous factors as described in my submission to Dr. van Elk (van Elk, 2010), but two issues in particular were pivotal:

1) although genetic analysis indicated that Morgan is a member of a killer whale population known from the coast of Norway, the few vocalizations recorded from her and analysed at the time were insufficient to make a strong link to any particular group(s) of Norwegian killer whales. Killer whales tend to live in stable matrilineal kin groups with distinctive vocal dialects, and acceptance into an unrelated social group is unlikely; and,

2) it was my understanding that the Norwegian killer whale population no longer enters protected fjords in the winter, and is distributed far from shore in the summer, so reintroduction of Morgan to this population was logistically unfeasible.

Since providing my advice in November 2010, new information on these two issues has recently come to my attention. First, more extensive analyses of recordings of Morgan have been undertaken and vocal patterns have been compared to recent recordings of killer whales off the coast of Norway (Vester and Samarra 2011). These analyses provide a much stronger link to the vocal repertoires of at least one Norwegian killer whale group (“P” group), and thus it can be inferred that this group is either Morgan’s natal group or a related kin group. Second, it appears that killer whales groups are now sighted frequently near Vesterålen in northern Norway during summer (see sighting logs archived at www.arcticwhaletours.com). Although I am not aware of any photo-identification analyses of killer whales in these recent sightings, they took place well within the range of the population that includes group “P”.

Given this new information, I now believe that rehabilitation back to the wild for Morgan is potentially feasible and an effort to accomplish this warrants serious consideration. A transport and release plan could be modelled after those developed for the whales Springer and Keiko, with appropriate modifications and contingency plans. Too little is currently known about factors leading to the successful rehabilitation of injured or stranded wild cetaceans, including killer whales, and Morgan would provide an important opportunity to gain valuable experience and knowledge.

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In the event that reintegration of Morgan to her natal group or another kin group is attempted but is unsuccessful, long-term holding in a floating enclosure in the sea would provide both an appropriate habitat for the whale and an opportunity to undertake a variety of important research projects. For example, studies on sound production and reception, physiology, and energetics in this semi-natural setting would provide useful and reliable information needed for conservation and management of human impacts on the species. Such studies are seldom possible in an aquatic park setting where animals undertake scheduled performances, and any results from this setting are likely to be influenced by the artificial holding enclosure and may not be representative of animals in the wild.

Should a decision be made to move Morgan to a sea pen for long-term study or for an attempt to rehabilitate her to the wild, I would be pleased to provide advice if requested and would be interested in collaborating on future research projects.

Sincerely,

John K.B. Ford, PhD
Head, Cetacean Research Program
Conservation Biology Section

Email: John.K.Ford@dfo-mpo.gc.ca

References Cited:


Vester, H., and F. Samarra. 2011 Comparison of Morgan’s discrete stereotyped call repertoire with a recent catalogue of Norwegian killer whale calls. Unpubl. manuscript dated 23 September 2011.
Dr. JOHN KENNETH BAKER FORD
B.Sc. Hons., Ph.D. (UBC)

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PERSONAL DATA
Date and Place of Birth: 28 January 1955 Victoria, B.C., Canada Citizenship Canadian Education B.Sc. (Honours) Zoology (1972-76), University of British Columbia Ph.D. Zoology (1977-85), University of British Columbia

EMPLOYMENT HISTORY

RESEARCH AND CONSERVATION ACTIVITIES
• Life history, social ecology, and acoustic behaviour of killer whales in British Columbia - Field studies on foraging ecology of killer whale ecotypes in British Columbia, including potential prey limitation of the salmon-feeding resident population (1990-present). - Annual field census using individual photo-identification of whales in coastal BC and adjacent waters, in collaboration with G. Ellis (DFO), and K. Balcomb (Center for Whale Research). 1977-present
• Status, distribution and abundance of cetaceans in British Columbia - Chief scientist on annual DFO ship surveys for cetaceans in British Columbia waters, 2002-2009 - Three-year field census program undertaken for Gwaii Haanas/South Moresby National Marine Park Reserve, Parks Canada; first such study in area. 1991-93; follow-up survey, 2004-2006.


Environmental Review Panel. 1984-85


- Abundance and distribution of cetaceans in the Canadian Arctic - Principal investigator in field study of distribution, abundance and age segregation of bowhead whales and other marine mammals, Beaufort Sea. 1986. - Co-investigator, aerial surveys of the distribution of white whales as related to physical and chemical oceanographic factors, southern Beaufort Sea. 1977. - Conducted systematic aerial surveys of marine mammals in Baffin Bay and Davis Strait. Aug-Oct 1976.

**ACADEMIC RELATED ACTIVITIES**

- Department of Zoology, Faculty of Science, University of B.C.: Research Associate, 1989-92; Adjunct Professor 1993-present - Research Associate, 1989-92; Adjunct Professor 1993-present


- Thomsen, F. 1999. An investigation of the acoustic signals of killer whales (Orcinus orca) off Vancouver

**AWARDS and FELLOWSHIPS**


**COMMITTEE MEMBERSHIPS**


**PUBLIC EDUCATION ACTIVITIES**

- Frequent public lectures on whale biology and conservation. Host organizations and facilities include Smithsonian Institution, Washington; Field Museum of Natural History, Chicago; Cleveland Natural History Museum, Ohio; National Aquarium, Baltimore; Columbus Zoo, Ohio; Canadian Geographical Society, Vancouver, Victoria, Nanaimo; Ottawa; Vancouver Island University; Royal British Columbia Museum, Victoria; Alberta Provincial Museum, Edmonton; Vancouver Institute, Vancouver. - Numerous popular magazine articles, including: National Geographic Magazine, Natural History (New York).

- Contributions to numerous television documentaries, including productions for National Geographic, Discovery Channel (Canada and US), Canadian Broadcasting Corporation, Australian Broadcasting Corporation, British Broadcasting Corporation, NHK Tokyo, TBS Tokyo. - Co-developed public displays and exhibits on marine mammals, Vancouver Aquarium Marine Science Centre.

**REPORTS AND PUBLICATIONS**

**Scientific Journals:**


**Books, Book Chapters, and Theses**


**Popular Articles:**
Villiers en Bois le 03/11/11

To Whom It May Concern:

In August 2010, I was asked by Dr. Niels van Elk of Dolfinarium Harderwijk, Netherlands, to provide expert advice on the releasability of the rescued killer whale known as ‘Morgan’. My opinion, like most of the researcher contacted was that rehabilitation to the wild without any knowledge of the pod origin of this killer killer whales was equivalent to “a death sentence” as killer whales rely on social grouping to forage efficiently, and I was suggested to maintain Morgan in a semi captive situation in a Norwegian Fjord.

Newly collected acoustic information reveals that that Morgan is related to the Norwegian P pod Morgan’s natal group or a related kin group. Furthermore new information indicate that killer whales groups are now sighted frequently near Vesterålen in northern Norway during summer. Given this new information, I believe that rehabilitation back to the wild for Morgan is potentially feasible.

In the event that reintegration of Morgan to her natal group or another kin group is attempted but unsuccessful, long-term holding in a a semi-natural situation, suc as keeping her in a Norwegian Fjord could provide both an appropriate intermediate measure which would be more satisfactory in terms of habitat for the whale and provide the opportunity to undertake a variety of research projects as well as raise public awarness about the protection and conservation of the marine environement.

Should a decision be made to move Morgan to a sea pen for long-term study or for an attempt to rehabilitate her to the wild, I would be pleased to provide advice if requested.

Christophe Guinet
Directeur de recherche
CEBC-CNRS
Dear Ingrid,

Thank you again for the information. I am reluctant at this time to write an official letter because I really have not had the time to investigate the entire situation. It is true that there has been additional research on the acoustic dialects of pods off Norway, but although we are getting closer to identifying relatives of Morgan there is still no assurance that she would be adopted if released. What also concerns me is that I personally have not been to Loro Parque, although I imagine that the facilities are less than ideal with respect to space (http://www.loroparque.com/en/orcas.asp), however modern they might be, and also the characteristics of the other captivity-born killer whales therein are unknown to me, and so, like others who have expressed opinions, I have concerns about the quality and appropriateness of this facility.

However, I am very concerned that something is done very soon and Morgan is relocated for two main reasons: 1) Morgan is growing and is hampered by lack of space where she is currently (this everyone agrees upon); 2) Morgan is deprived of social contact which is essential for her wellbeing and development. It could be that from the space point of view, the sea pen may be a temporary solution, but this does not afford a long term solution for contact with other killer whales which Morgan would at least have contact with in Loro Parque.

I have often thought that live-stranded and sick animals should possibly be euthanised at source, simply because the problems that subsequently arise often do not have simple or appropriate solutions for the animal. There have been successful rehabilitations, Morgan being one of them, but I do not want to enter this field of argument. Death is something that every living organism must experience sooner or later, but the quality of life while living is important. The costs of maintaining rehabilitated animals and also releasing them are very high, and I find this kind of finance being invested in one animal somewhat immoral when there are so many other causes to support today.

One thing that I do think is that it would be a very interesting scientific experiment to prepare Morgan for ultimate release into the open sea, providing she is tagged for tracking and monitoring on release. One could take the pragmatic view that she would be an indicator of potential survival and the results might be very helpful as guidance in future cases should they arise. Taking this experimental approach - because that is how I see it, does not necessarily place the animal's wellbeing as a priority, but might possibly make strides forward in our understanding of how killer whales adapt to new situations and how they might (or might not) survive. Are we ready to take this step?

You may use my arguments as you wish, but I cannot at this time make a firm new recommendation regarding Morgan's future.

Best regards,
Christina.

NB Please note that my affiliation is with Age Dynamics.

Dr Christina Lockyer
Age Dynamics
c/o Innelvveien 201
Kaldfjord
N-9100 Kvalsleysletta
Norway
Dear Ingrid,

Thank you for showing me the documents from the Free Morgan projects. The plan of moving Morgan to a sea pen in a fjord in Vesterålen or Lofoten is very much in line with my original recommendation, which was to place Morgan under human care in a sea pen with plenty of activity.

I have worked with Jeff Foster in the past and I do not know anyone better qualified than him to advise during the transport and setting up of a sea pen.

Thus, the first steps in the Free Morgan project: transport to Norway and rehabilitation in a sea pen seem like a very good option for Morgan's near future.

I am not in the position to comment as to whether the next step after moving the whale to a sea pen should be release into the wild or a future under human care. Such an evaluation would need more time than what is available for me.

When Keiko swam into Norway, I participated in the discussions between the Norwegian government, the local authorities and Keiko’s caretakers. Norway took the welfare of Keiko very seriously and implemented legislation for his protection. With basis on this experience I assume that establishing a sea-pen for a killer whale will only be allowed by the Norwegian authorities if the operation is done in a responsible way.

I understand that it may seem hard to choose between sending Morgan to a tank in Tenerife where she can have social interactions with other killer whales or sending her to a not yet established sea pen in Norway where she could have a large natural environment to live in. I believe that the large natural environment in Norway, coupled and good quality human care including social interactions with humans could be the healthiest option for the animal.

Feel free to include this text in your file case.

All best,

Fernando Ugarte
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