



# **EAZA Population Management Manual: Standards, procedures and guidelines for population management within EAZA**

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## Contents

Abbreviations and acronyms.....	1
Introduction .....	4
1 Background.....	5
1.1 Foundations and concepts of (EAZA) Ex situ Population Management.....	5
1.1.1 Management of small populations .....	7
1.2 Outline of EAZA’s Population Management structure .....	9
1.3 EAZA Organisational Structure for Population Management .....	10
2 Regional Species Management and EAZA Taxon Advisory Groups (TAGs).....	15
2.1 TAG working procedures .....	15
2.1.1 General TAG principles .....	15
2.1.2 Initiation and establishment of a new TAG .....	28
2.2 Regional Species Planning.....	29
2.2.1 <i>Ex situ</i> conservation priorities and Regional Species Planning .....	29
2.2.2 EAZA’s Regional Species Planning process .....	30
2.3 EAZA Best Practice Guidelines.....	42
2.3.1 Process, status and publication.....	42
2.4 Procedures to approve new/changes to TAGs .....	43
2.4.1 Changes to, and establishing new, TAG .....	45
2.4.2 Decision making procedure.....	46
2.4.3 EEP and TAG roles and GDPR compliance .....	47
2.5 Procedures to approve new/changes to EEPs.....	47
2.5.1 Changes to, and approving new, EEPs.....	49
2.5.2 Changes to, and approving EEP Vice coordinators.....	50
2.5.3 Decision making procedure.....	52
3 Working procedures for EEPs.....	53
3.1 Initiation and establishment of an EEP .....	53
3.2 Management of the EAZA Ex situ Programme after establishment .....	55
3.3 Handing and taking over an existing EEP .....	57
3.4 EAZA Members and EEP Participation .....	58
3.4.1 Full Members .....	58
3.4.2 Associate Members.....	59
3.4.3 Temporary Members.....	59
3.4.4 Candidate for Membership .....	60

3.5 EEP participation consequences for zoos leaving EAZA Membership .....	61
3.6 Non-EAZA Members and EEP Participation .....	61
3.6.1 General non-EAZA EEP participation philosophy and procedure .....	62
3.6.2 Non-EAZA EEP participation: EAZA region .....	64
3.6.3 Non-EAZA EEP participation: other regions .....	67
3.6.4 EEP participation and MoU partners.....	68
3.6.5 Procedure for sending EEP animals outside of programme .....	68
3.6.6 Forwarding non-EAZA EEP participation requests .....	68
3.6.7 Non-EAZA EEP participation fee.....	71
3.7 Rules of joint population management .....	71
3.8 The EEP Species Committee.....	74
3.8.1 Number of Species Committee Members.....	74
3.8.2 Elections .....	75
3.8.3 Geographic representation .....	75
3.8.4 Advisors .....	75
3.8.5 Veterinary Advisors .....	76
3.8.6 Terms of membership and re-election.....	78
3.8.7 Conflicts of interest .....	78
3.8.8 Meetings, agendas and minutes .....	80
3.8.9. Voting and conflicts.....	81
3.8.10 Subjects to be dealt with by the Species Committee.....	81
3.8.11 Exceptions and alternatives .....	82
3.9 Long-Term Management Plan (LTMP).....	83
3.10 The EEP annual report.....	85
3.10.1 EEP pages .....	85
3.11 The studbook .....	85
3.11.1 ZIMS for Studbooks .....	86
3.11.2 Data to be included in the studbook.....	86
3.11.3 Studbook data validation .....	88
3.11.4 International and regional studbooks.....	88
3.11.5 Publication of studbooks.....	90
3.11.6 Ownership of studbook data.....	90
3.11.7 Sharing studbook data within and outside EAZA .....	91
3.12 Studbook analyses .....	94
3.12.1 EEP roles, goals and recommendations .....	94
3.12.2 PMx .....	94

3.12.3 Group management .....	95
3.13 Annual breeding and transfer recommendations .....	95
3.13.1 EEP recommendations .....	95
3.13.2. Non-breeding recommendations (EEPs) .....	97
3.14 Conditions of animal transfers and the role of the EEP Coordinator .....	99
3.14.1 Conditions of transfers .....	99
3.14.2 Transfers recommended for population management .....	100
3.14.3 Transfers suggested by participants .....	100
3.14.4 Placement of animals out of the EEP .....	100
3.14.5 Animal transfers between regions .....	105
3.14.6 Importation of species from the wild into the EEP .....	106
3.14.7 Exportation of species from the EEP to the wild.....	106
3.14.8 The role of the EEP Coordinator.....	107
3.15 EEP evaluations .....	107
3.16 Conservation funding from EEPs.....	109
3.17 Population management programme communications .....	110
3.17.1 Internal communication.....	110
3.17.2. Social media .....	111
3.17.3 Publication and sharing of information through EAZA channels or with media.....	112
3.18 EEP Complaint procedure .....	113
4 Institutional population management.....	115
4.1 Institutional Species plan .....	115
4.1.1 Rational .....	115
4.1.2 Process .....	116
4.1.3 When choosing species for the species plan, Members should consider .....	116
4.2 Animal acquisition and disposition .....	118
4.2.1 Terms and definitions.....	118
4.2.2 Legal acquisition and disposition .....	120
4.2.3 Sustainable acquisition and disposition.....	120
4.2.4 Ethical acquisition and disposition.....	120
4.2.5 Transport of animals .....	126
4.2.6 ZIMS Available and Wanted tool.....	127
4.2.7 Non breeding recommendations .....	127
4.2.8 Contraception (and the EAZA Reproductive Management Group).....	127
4.2.9 Management euthanasia/culling .....	128
4.3 Releasing animals to the wild .....	129

4.3.1 Rules and procedures for conservation translocations from EAZA Members .....	130
4.4 Invasive Alien Species.....	135
4.5 EAZA Animal Transport Guideline .....	135
4.6 Ownership of animals within EAZA .....	136
4.7 Institutional Species Planning and Demonstration animals.....	137
4.8 EAZA Biobank .....	137
4.9 Theft of (EEP) animals from EAZA Member institutions .....	139
5 Training/Further information .....	141
5.1 Population Management Training under the EAZA Academy.....	141
5.1.1 Introduction to EAZA Ex Situ Programme Management Course.....	141
5.1.3 Further EAZA Academy courses .....	142
5.2 EAZA website, Zooquaria and other publications .....	142
5.3 Additional questions and support.....	142
Overview of Appendixes .....	143
Appendix 1: References and Recommended further reading.....	146
Appendix 2a: EAZA Regional Species Plan, standard format.....	148
Appendix 2b: Species Assessment Sheet .....	154
Appendix 2c Standard RSP role descriptions .....	162
Appendix 2d: Investigating potential ex situ Conservation Roles .....	168
Appendix 3: Template for proposing a new EEP.....	171
Appendix 4: EAZA Best Practice Guidelines template .....	176
Appendix 5 a: TAG Evaluation - TAG Chair Questionnaire .....	185
Appendix 5 b: TAG evaluation - TAG member questionnaire.....	190
Appendix 5 c: TAG Evaluation - EEO Questionnaire .....	193
Appendix 5 d: TAG Evaluation: Standard Summary Report.....	196
Appendix 6: Proposal for new TAG .....	204
Appendix 7a: Example letter of confirming support to a TAG (Vice) Chair .....	206
Appendix 7b: Example letter of providing institutional support to an EEP (Vice) Coordinator.....	207
Appendix 7c: Example letter of withdrawing institutional support.....	208
Appendix 7d: Example letter for providing TAG support for EEP Coordinators .....	209
Appendix 8: Decision tree EAZA EEP participation procedure.....	210
Appendix 9: Temporary Member participation in an EEP - standard format for requesting approval from the EEP Committee - Application form A –Temporary Membership [including Temporary Membership under construction].....	211

Appendix 10: Candidate for Membership participation in an EEP - standard format for requesting approval from the EEP Committee Application form B – Candidate for Membership.....	213
Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval from the EEP Committee - Application form C –Non-Member of EAZA, in EAZA region .....	216
Appendix 12a: Non-EAZA institution participation in an EEP- standard format for requesting approval from the EEP Committee -Application form D – Non-Member of EAZA, the proposed EEP participant is located out of the EAZA region.....	220
Appendix 12b: Non-EAZA institution, outside the EAZA region - standard format for requesting outplacement approval from the EEP Committee - Application form E – Non-Member of EAZA, the proposed facility is located outside the EAZA region. ....	224
Appendix 13: EAZA Template contract for non-EAZA EEP participants .....	227
Appendix 14: EAZA studbook template .....	229
Appendix 15: Guidelines for Veterinary Advisors appointed to EAZA TAGs and EEPs ...	232
Appendix 16: What is a Long-term Management Planning Meeting? .....	238
Appendix 17: System of EEP Monitoring .....	241
Appendix 18: EAZA Guidelines for Animal Transfers between Regions .....	243
Appendix 19: EAZA Guidelines for decision making and due diligence, including when importing EEP animals from the wild .....	246
Appendix 20: EAZA Template Programme Annual Report.....	247
Appendix 21: EAZA Fundraising Account Application.....	251
Appendix 22: Guidelines for independent EAZA-related social media managers .....	253
Appendix 23: Sanctions in the case of a violation of the EAZA Code of Ethics and Conduct, EAZA Standards, or EEP Procedures .....	259
Appendix 24: EAZA guideline on animal transport.....	265
Appendix 25: Position Statement on Management euthanasia/culling .....	268
Appendix 26 Euthanasia for Population Management: Scientific Background.....	273
Appendix 27 Veterinary Considerations for Management Euthanasia .....	300
Appendix 28: Guidelines for population management programme administration and handover .....	303
Appendix 29: Access Roles in ZIMS for Studbooks .....	311
Appendix 30: Template Non-Disclosure Agreement EAZA Studbook Data .....	313
Appendix 31: EAZA and the Nagoya Protocol .....	316
Appendix 32 Example of Conservation Translocation project checklist.....	337

## Abbreviations and acronyms

<b>AI</b>	Artificial Insemination
<b>ALPZA</b>	Latin American Association of Zoological Parks and Aquariums
<b>APC</b>	Animal Programmes and Conservation team at EEO
<b>ASMP</b>	Australasian Species Management Programme
<b>ATWG</b>	EAZA Animal Training Working Group
<b>AWWG</b>	EAZA Animal Welfare Working Group
<b>AZA</b>	Association of Zoos and Aquariums (North America)
<b>CAMP</b>	Conservation Assessment and Management Plan
<b>CPSG</b>	IUCN SSC Conservation Planning Specialist Group
<b>CEO</b>	Chief Executive Officer
<b>CfM</b>	Candidate for Membership
<b>CITES</b>	Convention on International Trade in Endangered Species
<b>CPM</b>	EAZA Conservation and Population Management team
<b>DNO</b>	Do Not Obtain
<b>EAAM</b>	European Association for Aquatic Mammals
<b>EAZWV</b>	European Association of Zoo and Wildlife Veterinarians
<b>EAZA</b>	European Association of Zoos and Aquaria
<b>EEO</b>	EAZA Executive Office
<b>EEP</b>	EAZA Ex situ Programme
<b>EEP Cie.</b>	EEP Committee
<b>EAZA RGM</b>	EAZA Reproductive Management Group
<b>eNews</b>	Electronic newsletter sent out by EAZA
<b>EPMAG</b>	EAZA Population Management Advisory Group
<b>EU</b>	European Union
<b>EUAC</b>	European Union of Aquarium Curators
<b>F1</b>	First generation
<b>FL</b>	Fork Length (when measuring fish)
<b>GD</b>	Gene Diversity
<b>GSMP</b>	Global Species Management Plan
<b>IATA</b>	International Air Transport Association
<b>ICAP</b>	Integrated Collection Assessment and Planning

<b>ISP</b>	Institutional Species Plan
<b>ID</b>	Identification or Identifier
<b>IUCN</b>	International Union for Conservation of Nature
<b>IUCN Red List</b>	IUCN Red List of Threatened Species
<b>IUCN SSC Specialist Group</b>	IUCN Species Survival Commission Specialist Group
<b>LTMP</b>	Long-Term Management Plan
<b>M&amp;E</b>	EAZA Membership and Ethics Committee
<b>Mon-T</b>	Monitored by TAG, RSP category for non-managed species in EAZA, with no additional specific recommendation
<b>Mon-T REPLw</b>	Monitored by TAG, RSP category for non-managed species in EAZA, with a specific recommendation to replace the species with an EEP species.
<b>Mon-T Phase out</b>	Monitored by TAG, RSP category for non-managed species in EAZA, with a specific recommendation to phase the species out.
<b>Mon-T DNO</b>	Monitored by TAG, RSP category for non-managed species in EAZA, that are not held by EAZA Members and for which there is a specific recommendation to not obtain this species.
<b>MoU</b>	Memorandum of Understanding
<b>Mx</b>	Age Specific Fecundity
<b>OPA</b>	One Plan Approach
<b>PMx</b>	Software for analysis and management of pedigreed populations
<b>PMC</b>	EAZA Population Management Centre
<b>PMM</b>	EAZA Population Management Manual
<b>PMP</b>	AZA Population Management Plan
<b>QPA</b>	Quick Population Assessment
<b>Qx</b>	Age Specific Mortality
<b>RMG</b>	EAZA Reproductive Management Group
<b>RSP</b>	Regional Species Plan
<b>RWG</b>	EAZA Records Working Group
<b>SEAZA</b>	South East Asian Association of Zoos and Aquariums
<b>Species360</b>	Not-for profit membership organisation providing the Zoological Information Management System (ZIMS)
<b>SSP</b>	AZA Species Survival Plan
<b>TAG</b>	Taxon Advisory Group
<b>TL</b>	Total length (when measuring specimen)

<b>VA</b>	Veterinary Advisor
<b>WAZA</b>	World Association of Zoos and Aquariums
<b>ZAA</b>	Zoo and Aquarium Association (Australasia)
<b>ZIMS</b>	Zoological Information Management System
<b>Zooquaria</b>	Quarterly published magazine by EAZA
<b>Zootrition</b>	Zoo Nutrition Software Programme

## Introduction

This EAZA Population Management Manual (PMM) is approved by the EAZA Annual General Meeting (AGM) and provides a thorough overview of the rules and procedures for, and gives guidance in relation to, population management in EAZA. The PMM is tailored towards three key audiences: EAZA Taxon Advisory Groups (TAGs), EAZA Ex situ Programmes (EEPs) and EAZA Members. The PMM is one of EAZA's key governing documents and includes Standards (must do) and Guidelines (should do) for EAZA Members to follow. There are five main chapters included in this PMM: (1) Background; (2) Regional Species Planning and Taxon Advisory Groups; (3) Rules and Working Procedures for EAZA Ex situ Programmes; (4) Institutional Species Planning and Management; and (5) Training and Further Information. Each chapter exist of a number of sub-chapters and paragraphs.

Chapter 1 provides general background information on the set up, development and the main principles and philosophies of EAZA's Population Management Structure. In Chapter 2 the Regional Species Planning process is explained and the roles, responsibilities and working procedures for TAGs are outlined. The third chapter provides a detailed explanation of the rules and working procedures for EEPs, including the do's and don'ts for the EEP Coordinator, EEP Species Committee and EEP participants, and when applicable, external partners participating in or cooperating with EEPs. The fourth chapter will zoom in on the species planning and management work and responsibilities of EAZA Members, for example acquisition and disposition of animals, and how these relate to the previous chapters as well to other EAZA documents such as the EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024). The fifth and final chapter will zoom in on training possibilities in relation to the EAZA's Population Management activities and provide suggestions for further reading and information.

With EAZA Membership and level of activities continuously growing, new rules and procedures are developed over time and therefore this manual can be regarded as a living document. For further information, please contact the EAZA Executive Office.

# 1 Background

This chapter provides an overview of the general foundations and concepts of (*ex situ*) population management and how these have informed EAZA's Population Management Structure. In the final section (1.3), the organisational structure of EAZA's Population Management activities is described.

## 1.1 Foundations and concepts of (EAZA) Ex situ Population Management

Since the mid-1980s cooperative breeding programmes in zoos and aquariums largely followed the "ARK paradigm". The default goal tended to be to build (mostly) closed, long term insurance populations that are demographically stable and large enough to maintain 90% of the gene diversity of the source population for 100-200 years (Soulé *et al.*, 1986). Animals that are part of these programmes would predominantly be kept on exhibit in many different zoos and aquariums within a region. This paradigm, with one clear 'concept' to get behind, was revolutionary and appropriate at that time. Cooperative species management among zoos and aquariums for the common good of populations was a relatively new concept that needed time to develop and has overtime become engrained in the culture within zoo and aquarium associations. EAZA and several other regional zoo and aquarium associations were at the time still in their infancy and now have well developed organisational frameworks for large scale *ex situ* population management. A few relatively younger zoo and aquarium associations are now in the midst of developing and further professionalising such frameworks. The ARK paradigm was a big stimulant for the development of the scientific principles, methods and tools for the management of small *ex situ* populations, and these are currently well spread throughout the zoo, conservation and scientific community (Leus *et al.*, 2011). Through the course of the era of the ARK paradigm, zoos and aquariums were not only able to cope with the consequences of legislation governing the importation of wild origin individuals and the growing societal awareness of the need for species conservation and individual animal welfare but became advocates for these in their own right.

In the previous decade, a number of internal and external developments and changes have taken place that were causing another paradigm shift (Baker *et al.*, 2011; CBSG, 2011; Barongi *et al.*, 2015; Traylor-Holzer *et al.*, 2019):

- The world is continuing to experience rapid losses of species and populations and many of the extant populations are undergoing significant declines and are becoming increasingly small and fragmented.

A growing number of species can thus be expected to require intensive management of individuals and populations alongside other conservation actions to ensure their long-term persistence. Some of this intensive management may include *ex situ* management. Conservation planning processes for *in situ* and *ex situ* populations often run largely in parallel (Redford *et al.* 2012, 2014); *in situ* stakeholders come together to develop conservation strategies/action plans to ensure viable *in situ* populations; and *ex situ* stakeholders do the same to ensure viable *ex situ* populations. This parallel approach may result in both communities missing out on the opportunity to make use of each other's wide range of expertise and experience; *in situ* plans perhaps paying insufficient attention to the potential need for intensive population management (*in situ* and/or *ex situ*); and *ex situ* plans not having the best design to make the strongest conservation contribution.

To help facilitate a more integrated approach to conservation, the Conservation Planning Specialist Group (CPSG) of the Species Survival Commission (SSC) of the International Union for Conservation of Nature (IUCN) has coined and is promoting the "One Plan Approach" (OPA) to species conservation planning: "*the joint development of management strategies and conservation actions for all populations of a species by all responsible parties to produce a single, comprehensive conservation plan for a species*" (Byers *et al.*, 2013). Simultaneously, IUCN SSC published its "Guidelines on the Use of *Ex situ* Management for Species Conservation", designed to help conservationists evaluate if, when and how *ex situ* management would be a valuable component of the overall conservation strategy for a particular taxon.

- Regional evaluations of the progress of programmes against the ARK paradigm's default genetic and demographic goals showed that many did not reach these (self-) sustainability criteria (Lees and Wilcken, 2009; Leus *et al.*, 2011; Long, Dorsey and Boyle, 2011). In reviewing these outcomes, it became evident that standardised goals across all programmes did not sufficiently consider and reflect that these parameters are different in different contexts, across time and between taxa, which in turn led to the realisation that a priori assignment of the same role, goals and form to each programme was perhaps no longer the most appropriate way forward (e.g. Baker *et al.*, 2011; de Man *et al.*, 2016). Simultaneously a growing number of EAZA breeding programmes indicated that they felt limited by the fact that programmes had to be assigned to just one of two management categories (EEP or ESB), the characteristics of each sometimes being inappropriate to the programme they ideally wanted to

build. Over time differences between these categories had become somewhat arbitrary and they were not always applied consistently across Taxon Advisory Groups (TAGs). Furthermore, the growing diversity in the types of taxa managed in *ex situ* programmes highlighted the limitations of the traditional pedigree based analytical tools for some of these, in combination with the growing importance of molecular genetic techniques, assisted reproductive technologies, biobanks, etc.

To appropriately reflect the breadth of population management activities, the needs of EAZA Members and the changes and opportunities within the conservation world at large, EAZA significantly updated its Population Management Structure. The updated structure was launched in 2018, following a thorough and holistic evaluation of EAZA's former population management structures. The implementation of this structure was evaluated in 2024, resulting in the conclusion that the main approach, processes, and key components (RSPs, EEPs, LTMPs) of the EAZA Population Management structure are effective, of good quality, produce the intended products, and support the achievement of intended outcomes. The evaluation also identified various points for improvement, however few of these required changes in the rules and procedures. The items that did require fine-tuning have been updated accordingly in this version of the PMM.

### 1.1.1 Management of small populations

Even if/when external threats can be managed, small populations can get caught up in an extinction vortex (Gilpin and Soulé, 1986; Frankham *et al.*, 2010) where demographic and genetic random events feed on each other to cause a high probability of population extinction. Random demographic events are issues such as normal environmental and intrinsic demographic variation in mortality rates, reproductive rates, sex ratio at birth etc., as well as catastrophes such as environmental catastrophes (floods, fires, etc.), disease outbreaks, political and/or economic instability etc. Random genetic events include loss of genetic diversity and inbreeding causing reduced fitness and evolutionary potential (genetic diversity makes natural selection possible). It is often readily accepted that small, fragmented wild populations thus require management to prevent extinction and ensure genetic and demographic health (i.e. that highly threatened species need intensive conservation actions, also at the level of individuals and populations). It should therefore come as no surprise that zoo and aquarium populations, which are both very small (compared to most wild populations) and very fragmented (spread over different institutions) need quite intensive management to be able to reach the conservation and/or non-conservation roles and the genetic and demographic goals and targets set out

for them in Regional Species Plans (RSP) and Long-Term Management Plans (LTMP's).

Rather than automatically assuming one and the same role (insurance) and one and the same genetic/demographic goal (keeping a population large enough to be able to maintain 90% of gene diversity for 100 years) for each EAZA Ex situ Programme (EEP), the EAZA Ex situ Programme Structure approved by EAZA Council and AGM is developed so that the Regional Species Plan (RSP) more precisely and more consciously evaluate which conservation and/or non-conservation roles are appropriate for which taxon, and so that the Long-Term Management Plans (LTMPs) investigate in more detail which genetic and demographic goals are best linked to the assigned roles and the situational circumstances of the taxon. Whereas developing (non)-breeding and transfer recommendations has traditionally received relatively more attention, other elements will see increased focus in addition to these recommendations, such as jointly developing strategies for socio-behavioural management, education, veterinary issues, banking, data gathering and research. The LTMPs are designed to provide a tailored action plan for the taxon, or taxa, to maximise the chances of the EEP reaching its roles and goals.

Pedigree analysis remains the most commonly used method for genetic and demographic management of zoo/aquarium populations, and this has proven to be very effective for species with relatively complete pedigrees and with individuals that can be marked and managed at the individual level. The growing diversity in the types of taxa managed in *ex situ* programmes and the roles and goals assigned to them, together with rapid progress and development in various scientific fields (e.g. molecular genetics, biobanking, assisted reproduction, etc.) leads to a growing number of cases in which pedigree management will (need to) be complemented with, or replaced by, other techniques. EAZA's present format for RSPs, EEP applications and LTMPs is designed to more rapidly and systematically identify those needs and opportunities, which is expected to lead to a) an intensification of partnerships between EEPs, EAZA committees and working groups, and external scientific partners; and b) a growing stimulus and momentum for the development of new science and tools.

In [Appendix 1: References and Recommended further reading](#) an overview is provided of the publications referred to in this chapter as well as a few suggestions for further reading if one wanted to take a deeper dive into topics described.

## 1.2 Outline of EAZA's Population Management structure

The EAZA Population Management Structure as approved by EAZA Council and AGM has taken the foundations and concepts as described in the previous section on board and is built around three main pillars:

1. **Regional Species Plan (RSP):** In the spirit of the One Plan Approach and through the application of the 5-STEP decision making process in the IUCN Guidelines on the Use of *Ex situ* Management for Species Conservation, Taxon Advisory Groups (TAGs) will (re)assess and decide which species are recommended to (continue to) be managed under an EAZA Ex situ Programme (EEP) and what the precise direct, and/or indirect, and/or non-conservation roles of each EEP will be. EEPs are defined as coordinated and collaborative population management activities that are endorsed by EAZA for species that are managed by EAZA Members aimed at having and maintaining healthy populations of individuals with positive animal welfare within EAZA or beyond. For species that are not considered for active management, the TAG will monitor the population trend. Each RSP will be submitted to and approved by the EAZA EEP Committee. RSPs are periodically reviewed and updated, including assessment of roles and need for a species to be managed as part of an EEP.
2. **Application for an EAZA Ex situ Programme (EEP):** For each new EEP that is recommended in an RSP an EEP application template will be completed. This template contains a series of questions concerning the envisaged participants, governance and general biological characteristics of the EEP that guide the TAG to make conscious decisions, rather than automatic assumptions, about the form and functioning of the EEP. The TAG can suggest tailor made options where the default is not in the best interest of the programme. Each application will be submitted to and approved by the EAZA EEP Committee. If there are changes in governance, characteristics, etc. for an existing EEP these will typically be captured and highlighted in the next edition of the RSP, that is subject to EEP Committee approval. If such changes are required before the next edition of the RSP, ad hoc approval may be requested from the EEP Committee, based on submission from the TAG explaining the rationale for the proposed change(s).
3. **Long-Term Management Plan (LTMP):** At regular intervals (~5 years by default, but adaptable according to the needs of the EEP) a LTMP will be produced for the EEP. Following from the precise role(s) and very general biological characteristics of the EEP as defined in the RSP and EEP

application, the LTMP will more precisely define the long term genetic and demographic goals for the programme and will stipulate an action plan with all the strategies and activities (e.g. demographic and genetic management, behavioural management, veterinary protocols, welfare science, data collection and research, education aspects, *in situ* support, etc.) to be implemented in the next 5 years in order for the EEP to stay on target in reaching its roles and goals. The scope and level of detail will differ between LTMPs based on programme needs and available resources. For some EEPs the LTMP will be more straightforward, whereas for other EEPs a more detailed LTMP will be developed. A LTMP may, but does not necessarily, include (non)breeding and transfer recommendations. When included, these recommendations will typically focus on the next breeding cycle and not cover the full span of the (5-year) LTMP. The EEP Coordinator and Species Committee are responsible for making further recommendations in the interim period between the publication of two LTMPs as often as is appropriate and required. Each LTMP is approved by the EEP Species Committee or equivalent (when in place) and after approval circulated to all EEP participating institutions and the relevant TAG for information and uploaded on the EAZA Member Area.

### 1.3 EAZA Organisational Structure for Population Management

The EAZA Council has delegated the responsibility for managing and overseeing the EAZA Population Management Structure to the EEP Committee. The EEP Committee envisions that EAZA animal populations contribute to global biodiversity conservation and reconnect people with nature, inspiring them to care for the natural world. Without animal populations EAZA Members cannot contribute to global biodiversity conservation or reconnect people with nature. Regardless of whether the conservation contribution takes place *in situ* and/or *ex situ* and is direct or indirect, to be successful it is important that populations that are part of an EAZA programme are managed scientifically, cooperatively and professionally as well as realistic to their set roles and goals. Healthy populations of individuals with positive animal welfare are what EAZA aims to achieve with its population management programmes.

Core tasks overseen by the EEP Committee include: development and implementation of population management standards, rules, procedures and guidance; the publication of Regional Species Plans (RSP) and EAZA Best Practice Guidelines (BPG); approval of new, and changes to, TAGs and EEPs; approval of non-EAZA EEP participation and cooperation with other partners in relation to

population management; addressing EEP related complaints, using the [Appendix 23: Sanctions in the case of a violation of the EAZA Code of Ethics and Conduct, EAZA Standards, or EEP Procedures](#) if needed be; and liaising with population management programmes in other regions. In alignment with the EAZA Strategies as developed every five years, the EEP Committee develops five-year Committee Action Plans that are available on the EAZA Member Area for more information.

EAZA Taxon Advisory Groups are at the heart of the EAZA Population Management Structure. For the taxa under its umbrella, TAGs are responsible for developing, implementing and updating the TAG's Regional Species Plan (RSP). The TAGs are supported in this task by the team at the EAZA Executive Office (EEO). TAGs oversee the EAZA Ex situ Programmes (EEP) run under their umbrella and provide support to the EEP Coordinator and EEP Species Committees in the day-to-day management of the programme, as well as provide guidance to the EAZA Membership in this regard. Another important task of the TAGs is the coordination of the production of EAZA Best Practice Guidelines (BPG) for the managed taxa under the TAG's umbrella. TAGs share the responsibility for the approval of non-EAZA EEP participants and other partners with the EEP Committee. For further details on the important role of EAZA TAGs please refer to [2.1.1 General TAG principles](#)

An EEP Coordinator, together with the EEP Species Committee (if in place) are responsible for the day-to-day management of each of the EAZA Ex situ Programmes (EEP). Developing, implementing and updating a Long-Term Management Plan (LTMP) is one of their core tasks, which is supported by the team at the EAZA Executive Office. Managing the EEP studbook dataset, developing (non-)breeding- and transfer recommendations, catering to the needs of EEP holders in alignment with the goals of the population, and publication of studbook and annual reports are other important tasks of the EEP. More details on the working procedures for EAZA Ex situ Programmes are included in chapter [3 Working procedures for EEPs](#).

In addition to the work of the TAGs and EEPs, the EEP Committee oversees four Working Groups, namely: EAZA Population Management Advisory Group (EPMAG), Animal Training Working Group (ATWG), Animal Welfare Working Group (AWWG) and Records Working Group (RWG).

The EAZA Population Management Advisory Group (EPMAG) provides advice to, and shares expertise with, the EEP Committee, TAGs, EEPs and the team at the EAZA Executive Office, in relation to (*ex situ*) population management science and tools. This working group will work in close cooperation with the EAZA

Population Management Centre. For more information, please refer to the EAZA website.

The EAZA Animal Training Working Group (ATWG) is in place to assist EAZA institutions with improving their animal training programmes. The ATWG aims to: develop and disseminate training protocols; share knowledge on the use of the most ethical, positive, least intrusive, and science-based animal training methods for positive animal welfare; establishing and maintaining a network of professional experts; and contribute towards using animal training best practice into the process of enclosure design. For more information, please refer to the EAZA website.

The EAZA Animal Welfare Working Group (AWWG) supports and advises EAZA *Ex situ* Programmes, Taxon Advisory Groups and other EAZA Committees and Working Groups in animal welfare best practice through applied, evidence-based, animal welfare science, in order to promote positive animal welfare throughout all EAZA institutions. For more information, please refer to the EAZA website.

The EAZA Records Working Group (RWG) aims to advise and guide EAZA institutions in their recordkeeping standards and technical abilities. The EAZA RWG provides a platform of open communication and knowledge sharing on best practice for registrars and recordkeepers within the EAZA community. The EAZA RWG will act as a support for the EAZA Taxon Advisory Groups, EAZA committees and Working Groups on topics that involve animal related data. For more information, please refer to the EAZA website.

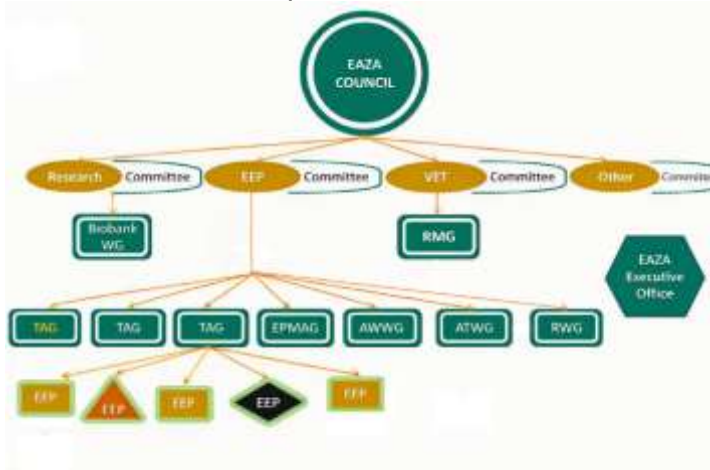


Figure 1 Organisational Overview of EAZA Population Management structure

The EEP Committee works closely together with other committees in the EAZA structure that provide important contributions to the successful implementation

of the EAZA Population Management Structure. Most notably these are the Conservation Committee, Veterinary Committee, Research Committee, and more recently the Conservation Education Committee, which each have representation in the EEP Committee. The EEP Committee also has a permanent representative of the aquarium community among its members.

Two working groups under the umbrella of the Veterinary Committee and Research Committee, respectively have a direct link to population management that require specific mentions here: the EAZA Reproductive Management Group (EAZA RMG) and the EAZA Biobank Working Group.

EAZA RMG is a working group under the Veterinary Committee of EAZA, and their mission is to support the EEPs, TAGs and EAZA Membership at large in relation to reproductive management in general and the use of animal contraception in particular. For more information refer to [chapter 4.2.8 Contraception \(and the EAZA Reproductive Management Group\)](#) and the EAZA RMG resources on the EAZA Member Area.

The Biobank Working Group falls under the umbrella of the Research Committee. The purpose of the Biobank Working Group is to help develop dedicated biobanking facilities within the EAZA zoo and aquarium community. This EAZA Biobank aims to be a primary resource for supporting population management and conservation research by using molecular genetics and genomics tools. For more information refer to [chapter 4.8 EAZA Biobank](#) and the Biobank Working Group page on the EAZA website.

The EAZA Executive Office (EEO) provides day-to-day support to the EEP Committee, TAGs, EEPs, working groups and other committees referred to above. Although not exclusively, this is mostly through the Conservation and Population (CPM) team under the Species Conservation Department (SCD) of the EEO, which is divided into the Animal Programmes and Conservation (APC) team and the Population Management Centre (PMC) team.

The APC team, among other tasks, supports the EAZA TAGs in the development of their Regional Species Plans (RSPs). Whereas the TAGs will be responsible for the content of the RSP publication as well as the decisions as to which species to propose to actively manage (EEP) and which species not to manage but to monitor (Mon-T), the APC team will be responsible for facilitating the RSP process and the technical preparation of the RSP publication for TAG approval.

The PMC team, among other tasks, will contribute to the development of Long-Term Management Plans (LTMPs) for the EAZA Ex situ Programmes (EEPs). The

LTMP process can be facilitated by staff of the PMC team Approval of the LTMPs lies with the EEP participants (or a representation thereof, e.g. an EEP Species Committee if in place). The PMC team will also focus on progressing population management science and further development of population management tools. Both teams work closely together, as well as with the Reproductive Biology Support Officer and Biobank Coordinator roles that are part of the Species Conservation department of the EEO.

## 2 Regional Species Management and EAZA Taxon Advisory Groups (TAGs)

This chapter outlines the working procedures for EAZA Taxon Advisory Groups (TAGs) and details the procedures for important regional species management topics such as the publication of Regional Species Plans (RSPs) and EAZA Best Practice Guidelines (BPGs).

### 2.1 TAG working procedures

This section on TAG working procedures intends to specify and explain the duties and responsibilities of a TAG, to document formally the work currently being carried out by TAGs and to provide guidance to manage TAGs. The procedures should include everything a TAG Chair, member or advisor needs to know in order to fulfil his/her role in the TAG satisfactorily. Additionally, section 2.1 aspires to ensure effective communication between TAGs, EEP Committee and the EAZA Executive Office.

There is a main **general** sub-section (2.1.1), which includes information on the structure and role of the TAG and its position within the organisational structure of EAZA, as well as the responsibilities of the TAG Chair. The following sub-section 2.1.2 Initiation and establishment of a new TAG explains a series of procedural points regarding TAG positions and their appointment, as well as steps in initiating a change in the remit of existing TAGs.

#### 2.1.1 General TAG principles

##### *Structure and role of a TAG*

Each TAG consists of:

- A **Chair** and one or more **Vice chair(s)**. The EEP Committee nominates and appoints TAG Chairs and TAG Vice chairs. The TAG Chair is responsible to the EEP Committee. TAG Chairs and TAG Vice chairs are appointed for a period of five years and may remain in position for two five-year terms according to the Terms of Office. TAG Chairs that step down are encouraged to continue as a member of, or advisor to, the TAG.
- A **core group** comprising all EEP Coordinators and TAG Veterinary Advisor(s). Additional procedures are in place for appointed EAZA Veterinary Advisors (see [3.8.5 Veterinary Advisors](#) and [Appendix 15](#):

[Guidelines for Veterinary Advisors appointed to EAZA TAGs and EEPs](#) for more information).

- A **membership** comprising a balanced representation of EAZA Member institutions with special interest in and/or expertise on the taxa covered, including a broad range of zoo disciplines.
- Experts in a specific field (e.g. nutritional, education, research, conservation and animal welfare) working for an EAZA institution may be invited into the group as **(internal) advisors**.
- Appropriate experts from outside the EAZA zoo community may be invited into the group as **(external) advisors**, e.g., IUCN/SSC specialist group Chairs, scientists and TAG Chairs in other regions.

The TAG Chair, Vice chair, all TAG members and internal advisors all have one vote each. External advisors are always non-voting members of a TAG. The majority vote is decisive and binding. All voting members must be given the opportunity to vote. Approving documents such as Regional Species Plans (RSP), EAZA Best Practice Guidelines (BPG) and approval of appointing Chairs, members or advisors, and setting up new programmes, are topics that the TAG could vote on.

There is no maximum number of TAG members and advisors. Members of the TAG who are not part of the core group can be delegated other responsibilities, e.g. coordinating EEP evaluations, *in situ* conservation projects and research projects, thereby further distributing the workload to benefit the whole TAG, and allowing more interested people the opportunity to participate actively in the TAG. However, TAG Chairs should be cautious about having too many TAG members, as the TAG may then become difficult to manage in terms of meeting arrangements and delegations.

TAGs that cover a large number of species and/or EAZA Ex situ Programmes can divide the group into subgroups with additional Vice chairs or appointed leaders in order to organise the workload more efficiently. The TAG can be divided in taxonomic and/or theme subgroups (see Box 1).

Box 1: Example themed subgroups of the EAZA Antelope and Giraffid TAG

For example, the Antelope and Giraffid TAG is divided into taxonomic subgroups (Okapi and Giraffe, Arid Land species, Woodland species and Savannah species) and theme subgroups (Conservation, Research and Education). The appointed subgroup leaders have the following responsibilities:

- Presenting reports on their subgroup in the Antelope and Giraffid TAG section of the EAZA Annual Conference.
- Summarising activities occurring in their subgroup and drawing attention to particular areas of interest.
- Providing the TAG Chair/Vice chair with a summary of their presentation in advance of meetings. The TAG Chair/Vice chair will minute any ensuing discussion during meetings.
- Representing the TAG's interests to relevant EAZA committees and working groups as appropriate.
- Stimulating and supporting the work of EEP Coordinators for "their" taxa within the subgroup.
- Bringing new issues to the attention of the TAG Chair/Vice chair and advising them on necessary changes in the RSP.

### *Responsibilities of the TAG*

- Develop and oversee the implementation of a Regional Species Plan (RSP) for the EAZA region in close cooperation with the team at the EAZA Executive Office. The RSP process is explained in detail in [section 2.2 Regional Species Planning](#)
- Advise the EEP Committee on which species require management through cooperative EAZA Ex situ Programmes (EEPs) and propose candidates to the EEP Committee to fulfil the roles of EEP Coordinator for those species.
- Assist EEP Coordinators in the development of their programmes.
- Monitor the performance of EEP Coordinators. Assist them with finding solutions to problems and answers to questions.
- Be proactive in communications and respond in a timely fashion to queries from EEP Coordinators, EAZA Members and other parties (even if an answer cannot (yet) be given or a request cannot be made).
- Keep oversight over the functioning of the EEPs run under the umbrella of the TAG, aiming to identify and resolve issues timely and effectively. The so called System of EEP Monitoring (SEM) is developed to help the TAG to facilitate this task (see [Appendix 17: System of EEP Monitoring](#)). In addition, the TAG is responsible for coordinating the input and assessment for the official evaluation of each EEP under the TAG's umbrella that takes place every five years in conjunction with the TAG

Evaluation. The EEP evaluation procedure is described in [Section 3.15 EEP evaluations](#)

- Provide input into the TAG evaluation process (see [TAG evaluations](#)) as coordinated by the EAZA Executive Office on behalf of the EEP Committee and provide proactive follow up on any action outcomes deriving from the evaluation.
- Oversee the production of EAZA Best Practice Guidelines for all recommended taxa covered. A template with the general outline and desired contents of EAZA Best Practice Guidelines (BPG), as well as information about the publication process, is found in [2.3 EAZA Best Practice Guidelines](#)
- Where and when relevant support the EEP Committee with development of discussion documents, procedures and guidelines on population management in general and specific to the taxa under the umbrella of the TAG (e.g., MoUs with external partners, decisions in relation to non-EAZA EEP participation, etc.).
- Support the EEP Coordinators and EEP participants with managing, and where possible solving, complaints in relation to the management of the EEPs under the umbrella of the TAG. Work with the EEP Committee to address complaint situations that cannot be solved on TAG level. For more information see [section 3.18 EEP Complaint procedure](#)
- Identify research priorities in cooperation with the EEP Coordinators. It is important to get an overview regarding which studies are most urgently needed for a particular species/species group. Optimising husbandry and welfare are a high priority, and research on topics such as nutrition, housing facilities and reproduction may be necessary. Zoo research can also directly benefit *in situ* conservation efforts by providing data on life history of species and use of management techniques. The Long-Term Management Plan (LTMP) development process is set up to address and document such priorities. Research advisors could assist in/undertake the writing of research proposals and organising and planning the projects.
- Provide a central point to access information on topics relevant to taxa covered. All TAG documents, including RSPs and EAZA Best Practice Guidelines as well as meeting minutes and important references, news, overview of TAG members and advisors and contact details can and should be made available on the EAZA website in the Member Area. It is

the TAG's responsibility to update its section of the website regularly. The TAG liaison at the EAZA Executive Office can be consulted for assistance.

- Actively encourage and/or advise the EAZA Membership to hold the appropriate taxa in accordance with the RSP, and to manage these taxa following TAG recommendations and guidelines.
- Build and/or maintain relations with relevant *in situ* partners, for example to jointly work on the implementation of the One Plan Approach for species conservation planning in the context of RSPs.
- Integrate zoo work with *in situ* conservation programmes where possible and appropriate. The TAG is encouraged to consult the EAZA Conservation Committee for cooperation and assistance as needed. Furthermore, the TAG should encourage EAZA Members to enter conservation related activities in the EAZA Conservation Database, which can be found at [www.eazaconservation.org](http://www.eazaconservation.org). The Chair of the Conservation Committee or liaison of the Conservation Committee at the EAZA Executive Office will be the first point of contact.
- When applicable the TAG is responsible for reviewing and confirming conservation translocation projects, including quality and alignment with conservation goals, for animals managed under an EAZA Ex situ Programme (EEP). For more information see [section .4.3 Releasing animals to the wild](#)
- Develop or encourage the development of educational material for their taxa.
- Provide a TAG Annual Report for inclusion in the overall EAZA Annual Report publication.

### *The tasks of a TAG (Vice) Chair(s)*

The role of TAG Chairs and Vice chairs is to direct, facilitate, coordinate and report on the TAG tasks specified above. Although tasks can be delegated to the Vice chairs, it is the TAG Chair's responsibility to ensure that these tasks are performed and that the appropriate reports and other documents are produced in a timely fashion on a regular basis.

The TAG Chair should ensure that:

- **A meeting is convened at least once a year.** Meetings may be held during the EAZA Annual Conference or during mid-year meetings or at other times if necessary. The TAG Chair can decide if such meetings are closed (with only the TAG members attending), or if it is open to all EAZA Members. Meetings during the EAZA Annual Conference are preferably open and will likely function to present on the work and activities of the TAG to the EAZA community and share and discuss new developments and key issues that need to be addressed. The mid-year meetings will more likely function as working meetings to discuss relevant issues in more depth and develop documents and strategies on a number of topic (e.g. conservation, research, veterinary issues, RSPs and BPGs). Meeting minutes should be produced during each meeting, finalised and published on the relevant website pages. During meetings, the TAG Chair should review aims and achieved results with the members. Regular contact with the members by e-mail, phone, online meeting platforms, etc. should be encouraged.
- A **Regional Species Plan** is prepared and updated according to new developments (See also [chapter 2.2 Regional Species Planning](#)).
- General **EAZA Best Practice Guidelines** for recommended species are produced and regularly updated according to the newest scientific standards. Depending on the species covered, general guidelines for the whole group may be published, rather than having separate manuals for every individual species.

Species- specific guidelines are the responsibility of EEP Coordinators; however, the TAG is responsible for coordinating the production as well as approving these guidelines and submitting them to the EEP Committee for endorsement (for further information on EAZA Best Practice Guidelines see [chapter 2.3 EAZA Best Practice Guidelines](#)).

EAZA Best Practice Guidelines are published on the public EAZA website and Member Area and “owned” by the EAZA community.

- **EEP evaluations are undertaken;** TAG (Vice) Chair(s) are responsible for keeping oversight over the functioning of the EEPs run under the umbrella of the TAG, aiming to identify and resolve issues timely and effectively. The so called System of EEP Monitoring (SEM) is developed to help the TAG to facilitate this task (see [Appendix 17: System of EEP Monitoring](#)) In

In addition, the TAG (Vice) Chair(s) are responsible for coordinating the input and assessment for the official evaluation of each EEP under the TAG's umbrella that takes place every five years in conjunction with the TAG Evaluation. In this process the TAG (Vice) Chairs(s) work in close consultation with their EEP Coordinators, the TAG's liaison at the EEO and the EEP Evaluation subgroup of the EEP Committee. The EEP evaluation procedure is described in [Section 3.15 EEP evaluations](#)

- **TAG evaluations are contributed to**, and outcomes of TAG evaluations are discussed within the TAG and any action items concluded as part of the evaluation process are taken on board for follow up towards set or otherwise realistic deadlines.
- **Problems are solved in a timely and appropriate manner**  
TAGs have an important role in preventing and resolving problems and occasionally manage conflict between stakeholders in the EAZA Population Management framework (e.g. EEP Participants and EEP Coordinators). Please refer to Section 3.18 on EEP Complaints, that provides further detail on this topic and the role that TAGs have in this regard.
- **Research priorities are determined** and identified according to current problems or questions within the TAG, and which address the needs of species within the RSP designated as "priorities" for research. The TAG may contact the EAZA Research Committee for assistance.
- **TAG information on the EAZA Member Area is updated** regularly and all documents are made accessible to the TAG members and the EAZA Membership.
- **Appropriate and timely replies are given** when TAGs are contacted by TAG members, TAG advisors, EAZA Members, the EEP Committee, the EEO or other relevant parties. Replies may include that the TAG does not (yet) prioritise a certain topic or action, that the TAG does not know the answer (yet) or is working on a topic towards a certain deadline and that patience will be required before coming back with a detailed answer.
- **Information of TAG goals and activities is disseminated**, via the EAZA website, the EAZA eNews, EAZA's quarterly published magazine Zooquaria and other publications.

- Links are developed and maintained with ***in situ* conservation activities and partners**. The TAG may contact the EAZA Conservation Committee for assistance and/or consult the EAZA Conservation Database ([www.eazaconservation.org](http://www.eazaconservation.org)).
- When applicable the TAG will coordinate the stakeholder processes of working towards ensuring the rules and procedures for **releasing animals into the wild** are met, as are described in [chapter 4.3 Releasing animals to the wild](#).
- **The following information is distributed** to TAG members and advisors, as well as to the EAZA Executive Office: minutes of all TAG meetings held, the TAG Annual Report, all editions of Regional Species Planning documents, copies of all best practice guidelines and studbooks published.
  - The EEP Committee strongly encourages sending copies of these documents to TAG Chairs in other regions and to IUCN/SSC Specialist Group Chairs, when this is relevant. The EAZA Executive Office can assist with bridging between the TAG and the relevant IUCN SSC Specialist Group(s).
  - These documents will be published on the EAZA Member Area or the public EAZA website as appropriate.
- The annual **TAG Chairs meetings** are regularly attended, to support efforts to improve the TAG cohort and to build cohesion among TAG Chairs.
- The TAG **liaises with other TAGs** in EAZA and with relevant TAGs and other experts in other regions.
- The TAG also liaises and **collaborates with partner organisations as appropriate** for the species under the umbrella of the TAG for example IUCN SSC Specialist Groups, universities and authorities. It is important to stress that although EAZA TAGs form part of the EAZA organisation, **TAG (Vice) Chairs have no authority to represent EAZA or bind EAZA in any formal manner** and as such have no power to negotiate, execute or sign any agreements, commitments, or documents on behalf of EAZA, make representations as to EAZA's position, incur financial obligations or commitments on behalf of EAZA, or hold themselves out as having power of attorney or other delegated authority to act on behalf of EAZA.

The authority to represent EAZA and execute binding commitments on its behalf is exclusively governed by EAZA's articles of association and other constitutional documents. This means that only individuals or bodies expressly authorised (such as the EAZA Director, EAZA Chair or members of the EAZA Executive Committee) may validly represent EAZA and/or enter into binding commitments on its behalf.

In instances where official agreements, commitments, or documents are considered necessary or beneficial for the work of the TAG, the TAG (Vice) Chair must engage the EEP Committee and EAZA Executive Office at the earliest practicable opportunity to obtain guidance on the appropriate procedures and approvals required, and to ensure that any such arrangements are properly authorised and executed by individuals with the requisite authority under EAZA's constitutional documents.

- **TAG statements** are produced when relevant. Please note that TAGs cannot produce official EAZA rules and procedures and that any TAG statements should be forwarded to the EEP Committee and EAZA Executive Office for information. Rules, procedures and official positions must be approved by the EEP Committee and later on by Council (and in some cases the Annual General Meeting). In cases where TAGs wish to make TAG statements stronger, the statements can be forwarded to the EEP Committee for discussions and possible approval. TAG statements should be developed, approved and published separately, prior to any inclusion of such statements in other documents like Regional Species Plans (RSPs) or Best Practice Guidelines (BPGs). The implementation of TAG statements should be monitored, and the statements should be reviewed (and updated) at relevant intervals.

In performing their tasks and duties, TAG (Vice) Chairs, must act in the best interests of EAZA.

Both the TAG Chairs' and the TAG Vice chairs' working performances are evaluated by the EEP Committee every five years. Evaluation is according to the agreed division of labour between the Chair and Vice chair(s). If a TAG (Vice) Chair consistently fails to perform his/her tasks, the EEP Committee may decide not to reappoint him/her, and to request that the TAG suggests a replacement. In rare cases, this may take place before the end of the five-year evaluation period. TAG (Vice) Chairs may appeal (in writing) against such a decision, and such appeals will be considered by the EEP Committee after soliciting the opinions of TAG members.

### *The tasks of the other TAG members*

Assist or advise the TAG (Vice) Chair(s) when/where ever possible or requested.

TAG members

The responsibilities of TAG members depend on their roles:

- a. TAG members being an EEP Coordinator;  
The tasks and expectations of EEP Coordinators are listed in [Chapter 3 Working procedures for EEPs](#). The TAG Chair, supported by the TAG Vice chair, monitors EEP activities and endeavours to see that the procedures are adhered to, offering help and support where necessary. They will also issue a warning to EEP Coordinators who are not performing adequately. Consistent failure of an EEP Coordinator to perform these tasks despite help and/or warnings from the TAG Chair will be reported – after consultation of the EEP hosting institution and the Species Committee members - to the EEP Committee by the TAG Chair. Based on such reports the EEP Committee may, in its sole discretion, decide to dismiss the EEP Coordinator from the position. A dismissal may be effected following the five-year evaluation of that EEP, or at any other time, where the EEP Committee deems such action necessary and appropriate in the circumstances. In the event of dismissal or other vacancy in the position of EEP Coordinator, the TAG shall be requested to propose a replacement candidate for approval by the EEP Committee. A former EEP Coordinator will not remain as a TAG member unless there are extenuating circumstances.
- b. TAG members without a species programme management task;  
It is up to the Chair, in consultation with the TAG members, to outline the expectation of TAG members who are not an EEP Coordinator. The TAG Chair is responsible for proposals regarding continuation of a person's membership based on the evaluation, and the TAG as a whole is responsible for deciding on this matter. Only those persons who are active and really involved should be a member of the TAG.

Internal and external advisors are added to a TAG to have a special expertise incorporated in the TAG. When relevant or requested they can be asked for advice. Active input and commitment is required from all TAG advisors. The TAG Chair should ensure that all members and advisors are actively involved in the TAG's work. All TAG members should regularly attend relevant TAG meetings, which for most members comes down to at least once a year.

In performing their tasks and duties TAG members and TAG advisors must act in the best interests of EAZA.

### *Conflicts of interest*

It is important for EAZA TAGs to make science-based, objective and democratic decisions, and to be aware of and avoid conflicts of interest with regards to their operations. A conflict of interest arises when the primary duty of a TAG (Vice) Chair, TAG member or TAG advisor to act in line with the best interests of EAZA and the TAG as part of the EAZA organisation and to act in line with the objectives, standards and guidelines of EAZA, is or may reasonably be perceived to be compromised by other interests. Such other interests may include, but are not limited to personal, financial, and other commercial and professional interests, any of which could potentially affect objective decision-making, integrity and trust in the TAG's operations and the fulfilment of the TAG responsibilities, as part of the EAZA organisation.

To avoid potential conflicts of interest, TAG (Vice) Chairs, TAG members and TAG advisors cannot perform, or be associated or engaged with organisations performing, activities (e.g. through employment, paid consultancy or otherwise) that are connected to brokering or dealing animals. Nor can they be involved in the selling of services, products or goods to zoos and/or aquariums.

In the process of appointing TAG (Vice) Chairs, TAG members or TAG advisors, the EEP Committee or the TAG, as appropriate, will enquire about potential conflicts of interest as outlined in the previous paragraph. Candidates that are found to have such a conflict of interest cannot be appointed into the respective position by the EEP Committee (TAG (Vice) Chair) or TAG (TAG members and TAG advisors). When such potential conflicts arise after the TAG (Vice) Chair, TAG members and TAG advisors have been appointed into their position, the respective TAG (Vice) Chair, TAG member or TAG Advisor that is conflicted, must immediately report these to the Chair of EEP Committee (in case of the TAG (Vice) Chair being conflicted) or TAG Chair (in case of the TAG member or TAG Advisor being conflicted). The Chair of the EEP Committee or TAG Chair shall determine whether there is a conflict of interest, and if so, will request the person to either cease the activities causing the conflict with immediate effect or stepdown from the position of TAG (Vice) Chair, TAG member or TAG advisor with immediate effect.

Moreover, in the day-to-day running of the TAG, TAG Vice chairs, TAG members and TAG advisors may, from time to time, have a conflict of interest with certain decisions that will be taken by the TAG. If that is the case, such TAG Vice Chair, TAG member and/or TAG Advisor should immediately report any such (potential)

conflict of interest to the TAG Chair. To this effect TAG Chairs are encouraged to ask participants to express any potential conflict of interest they might have at the start of a meeting or online decision-making process.

The TAG Chair shall determine whether there is a conflict of interest. TAG Vice chairs, TAG members and TAG advisors shall not participate in the discussions and decision making on a subject in relation to which they have a conflict of interest.

In case the TAG Chair has a (potential) conflict they should turn to the TAG Vice chair, who should assume the role normally assigned to the TAG Chair as per the above. In case both TAG Chair and TAG Vice chair have a (potential) conflict of interest, or in case they cannot objectively assess whether TAG members or TAG advisors have a conflict of interest, they should ask the Chair of the EEP Committee to assume the role normally assigned to the TAG Chair.

Where all TAG members that are eligible to vote have a conflict of interest, the relevant decision(s) shall nevertheless be taken by the TAG.

### *TAG evaluations*

The EAZA Taxon Advisory Groups (TAGs) are at the heart of EAZA's species planning and management framework. TAGs are responsible for producing, implementing and updating Regional Species Plans and Best Practice Guidelines as well as monitoring the functioning of the EAZA Ex situ Programmes that are run under the remit of the TAG. TAGs also have increasing responsibilities towards research and *in situ* conservation activities. It is thus of crucial importance that TAGs function to the best of their abilities. Hence it is agreed to be important to evaluate the functioning of the TAGs cyclically to get an idea of how TAGs are operating, what goes well and what are problems and challenges the TAGs are facing. The aim of such an evaluation is to improve the process of how a TAG functions and to improve and maintain a level of quality of its output.

### TAG evaluation procedure

As TAGs report to the EEP Committee in the EAZA structure, the TAG evaluation procedure is overseen by the EEP Committee and coordinated by the EAZA Executive Office (EEO). The order of evaluations will be decided upon by the EEP Committee to ensure the workload gets divided equally over the years. The TAGs are evaluated according to a five-year cycle. With around 42 TAGs that means 8-9 TAGs will be evaluated annually. A TAG can, however, ask to postpone its evaluation for one year. An evaluation will be launched by the EEO.

- TAG chairs are asked to complete a standard questionnaire (see [Appendix 5 a: TAG Evaluation - TAG Chair Questionnaire](#));

- TAG members (including vice chairs, internal advisors) are asked to complete a standard questionnaire (see [Appendix 5 b: TAG evaluation - TAG member questionnaire](#));
- The EEO completes a questionnaire (see [Appendix 5 c: TAG Evaluation - EEO Questionnaire](#));

Input from the three questionnaires will be summarised in a summary report (see [Appendix 5 d: TAG Evaluation: Standard Summary Report](#)) that will be reviewed by the TAG evaluation subgroup that will submit a report to the EEP Committee. Members of the subgroup and the resp. TAG liaison will discuss the results with the Chair and Vice-Chair before getting back to the TAG with a final response of the EEP Committee.

#### *TAG Chair questionnaire*

Per TAG one 'TAG Chair questionnaire' should be completed. The EEO will launch the Evaluation and circulate the questionnaire to the TAG chair. It is up to the chair to communicate with and include input from the vice chair(s). The vice Chairs will get the possibility to complete a TAG member questionnaire.

#### *TAG member questionnaire*

The EEO will ask the TAG chair for the most current overview of TAG members and distribute the 'TAG member questionnaire' to all members (including vice chair(s)) and internal (EAZA Member -based or -supported) advisors of the TAG. TAG members will be asked to send completed questionnaires to the EEO, who will collate the results. At least 50% of the TAG members should complete the questionnaire to get representative results.

#### *EEO questionnaire*

The EEO will complete the EEO questionnaire.

#### *TAG Evaluation subgroup*

The EEP Committee mandated an evaluation subgroup to finalise the evaluations. The subgroup exists of four members of the EEP Committee and the EEO. After collating the information from the parties involved, the EEO will circulate the summary report to the subgroup. The members of the subgroup will be asked to review the outcome and based on that answer the following questions:

- Give an overall rating on the functioning of the TAG;
- Give a rating on the leadership within the TAG;
- Summarise the main problems and challenges;
- Summarise the need for improvements and actions to follow up after evaluations, including who is responsible for following up.

Members of the subgroup and the resp. TAG liaison will discuss the preliminary results with the (Vice) Chair(s) during a call. The final results of the evaluation incl. the summary report and the suggested improvements and actions as approved by the EEP Committee will be made available to the TAG (Vice) chair(s). The TAG members will receive a copy of the final results (letter) by the EEO, as well as the CEO of the EAZA member providing Institutional support to the TAG (Vice) Chair(s). The TAG Chair will be asked to monitor the implementation of the improvements and report progress to the EEP Committee annually, until the actions are carried out. The EAZA membership will be informed annually about the progress of the TAG evaluation cycle (eNews), and final results will be made available upon request.

### 2.1.2 Initiation and establishment of a new TAG

Proposals for new TAGs (as a split off from an existing TAG) and EEPs, as well as proposals for a change to an existing TAG or EEP require approval from the EEP Committee. A number of documents specific to the initiation and establishment of a new TAG need to be submitted to the Chair of the EEP Committee (via the EAZA Executive Office) before being forwarded to the members of the EEP Committee for their consideration. An explanation of documents needed for this procedure can be found in [chapter 2.4 Procedures to approve new/changes to TAGs](#) and [Appendix 6: Proposal for new TAG](#).

#### *TAG Establishment*

To initiate and establish an EAZA TAG, the TAG Chair should take the following steps:

- a. **Divide the TAG responsibilities** between themselves and the Vice chair(s) (where applicable). The division of labour will depend on the persons involved and on the needs of the TAG. However, it should be equitable and distributed based on individual interests and expertise. The division of labour should be clearly defined as soon as a Vice chair is appointed and should be communicated to all the members of the TAG, EEP Committee and EAZA Executive Office.
- b. **Establish links** with the equivalent TAG Chairs in other regions, appropriate SSC specialist group Chairs and CPSG.
- c. **Hold the first meeting** of the TAG, during which membership should be formalised.

- d. Following the first meeting, **inform the EAZA Executive Office** about the division of labour between the Chair and Vice chair and provide them with the names and addresses of the TAG members.

### *Changing TAG Chairs and adding Vice chairs*

The procedures for (re)appointing EAZA TAG Chairs and EAZA TAG Vice chair are explained in detail in

2.4 Procedures to approve new/changes to TAGs [2.4 Procedures to approve new/changes to TAGs](#)

### *Changing and adding TAG members*

- Newly approved EEP Coordinators –both for new programmes and existing programmes- are automatically added to the core group of TAG members. The former EEP Coordinator can continue to be in the TAG membership if acceptable for both sides.
- A Vice EEP coordinator position is not automatically entitled to a (voting) TAG membership, given that the EEP Coordinator is already fulfilling this position per default. Approval as TAG member is up to the TAG in accordance with the normal procedure to appoint members.
- Interested colleagues of EAZA member institutions can be invited and added to the TAG membership after approval of the current TAG members.
- Advisors can be invited and added to the TAG after approval of the current TAG members.

## **2.2 Regional Species Planning**

As described in the previous section, developing, evaluating and updating a Regional Species Plan (RSP) is one of the core responsibilities of EAZA Taxon Advisory Groups (TAGs). As part of the RSP, TAGs should determine which species are recommended to be managed under an EAZA Ex situ Programme (EEP) and what the precise direct, and/or indirect, and/or non-conservation roles of each EEP will be. RSPs and the identified EEPs, and their established roles, will be re-assessed on a routine basis. In this process it is important to find a balance between the need of the species, conservation and the EAZA Members on the one hand, and what is realistically feasible in terms of capacity (space, funding, staff) on the other hand.

## 2.2.1 *Ex situ* conservation priorities and Regional Species Planning

In the ideal world all (threatened) species are covered by an integrated conservation action plan, developed according to the One Plan Approach (OPA) and applying the IUCN Species Survival Commission Guidelines on the Use of *Ex situ* Management for Species Conservation. This would make it clear to professional zoos and aquariums, like the EAZA Membership, which species require some form of *ex situ* management for conservation and which of those are best delivered by EAZA and its Membership. Despite a steady growth in the number of taxa for which this is the case, and it being the ambition of the IUCN SSC to scale up the development of such conservation action plans, the majority of species is not yet covered by such an integrated plan.

Whilst EAZA is fully on board with the ambitious targets for conservation action planning as set by the IUCN SSC, this obviously is a long-term project. The EAZA community (e.g. Members, TAGs, experts) can and should proactively contribute to the development of these actions plans, also recognising that the onus to implement the OPA lies with both the *in situ* and *ex situ* communities. EAZA (like other regional zoo and aquarium associations) needs to be able to continuously plan its species and thus take a leading role in applying the OPA and the IUCN *ex situ* guidelines to develop the *ex situ* conservation priorities for EAZA to concentrate on as part of the EAZA Regional Species Plan.

EAZA applies the 5-step assessment process of the IUCN *ex situ* guidelines as the foundation of its Regional Species Planning process. EAZA, together with other regional zoo and aquarium associations and the IUCN SSC Conservation Planning Specialist Group (CPSG) have jointly developed a process for this purpose, which CPSG now refers to as Integrated Collection Assessment and Planning (ICAP). The 5-step assessment process can be applied to develop EAZA Regional Species Plans focussed on regional level only but can also be used on a global level. Details on the rationale and methodology of the ICAP process can be found in Traylor-Holzer, Leus and Bauman (2019). This 5-step assessment process can equally be used for assessing and developing the non-conservation roles and goals (if any) for EAZA *Ex situ* Programmes.

## 2.2.2 EAZA's Regional Species Planning process

### IUCN *ex situ* guidelines

The EAZA RSP process is structured around the IUCN SSC Guidelines on the Use of *Ex situ* Management for Species Conservation, which utilizes a five step decision process to determine if and which *ex situ* activities might be appropriate

to be included in the overall conservation strategy for the species. These five steps are (IUCN SSC, 2014; McGowan *et al.*, 2016):

- a. Conduct a thorough status assessment (of both *in situ* and any known *ex situ* populations) and threat analysis.
- b. Identify potential roles that *ex situ* management can play in the overall conservation of the species.
- c. Define the characteristics and dimensions of the programme needed to fulfil the identified potential conservation role(s).
- d. Define the resources (including finances, staff and holding space) and expertise needed for the *ex situ* management programme to meet its role(s) and appraise the feasibility and risks.
- e. Make an informed and transparent decision as to which *ex situ* roles and activities (if any) to retain within the overall conservation strategy of the species.

The RSP methodology below describes how this 5-step process was adjusted and applied in the context of developing an EAZA RSP.

#### RSP team

The work required to prepare, develop and publish an EAZA RSP will be shared by a team that will work together on all components of the process. The task focus can be described as follows: The TAGs will be responsible for the content of the RSP publication as well as the decisions as to which species to propose to actively manage (EEP) and which species not to manage but to monitor (Mon-T). Staff of the EAZA Executive Office's Conservation and Population Management Team will be responsible for facilitating the RSP process and the technical preparation of the RSP publication for TAG approval. When approved by the TAG, the RSP will need to be approved by the EEP Committee before publication on the EAZA website and being implemented.

#### Pre-workshop Preparation

The following describes the pre-RSP workshop preparatory work that needs to be undertaken.

#### *Defining the scope of the RSP*

The RSP team should determine the regional and taxonomic scope to work on and thus to include in the RSP publication. As one or more RSPs have been

published for all TAGs, this means that existing RSPs have to be reviewed and/or additional new species have to be assessed.

TAGs with a smaller number of taxa will be able to include all taxa in one RSP session and do a thorough (re-) assessment for each taxon. For larger TAGs the scope of the RSP session will need to be adjusted – possibilities are:

- a. Regional scope: Is the intention to only make an EAZA level RSP or is the intention to first make global recommendations (e.g. through a global process) followed by an EAZA specific RSP session (that translates global recommendations to the EAZA situation and procedures).
  
- b. Taxonomic scope: Can all taxa in the TAG be dealt with in one RSP/workshop? A maximum of likely 40-50 taxa can be taken through a full species assessment during a two-day workshop. Options include but are not limited to:
  - i. Split the taxon in several taxonomic groups and develop an RSP for each group over time (e.g. EAZA Troll TAG: RSP part I: Mountain trolls; RSP part II Lowland trolls);
  - ii. Devise a system to limit/prioritise species that the TAG wishes to take through a full species assessment (with detailed evaluation of potential *ex situ* roles). Several parameters can be considered for this prioritisation (e.g. already in captivity/EAZA or not, already part of a managed programme or not, confidence in *ex situ* care, degree of threat, likelihood for need for *ex situ* conservation etc. – what is a relevant parameter will depend on the taxon and will be discussed with the TAG Chairs);
  - iii. Take a larger number of species through a detailed assessment but adjust the RSP workshop format (e.g. work in working groups, group species with similar circumstances, facilitated online discussion for a subset of species whereby only those species for which there is no online consensus are brought to the workshop, etc).

#### *Select date and location of RSP workshop*

Depending on the size of the TAG (or sub-group being focused on for workshop), determine number of days needed. This is typically two to three days.

#### *Determine invitees to the RSP Workshop and send invitations*

People to invite to an EAZA RSP workshop are:

- a. All EAZA TAG members (e.g., Chair, Vice chair(s), EEP Coordinators, advisors)
- b. Relevant *in situ* colleagues/organisations (e.g., IUCN Specialist Group Chairs/members, *in situ* experts, government officials, non-government organisations, etc. Emphasis should be made to include *in situ* representatives following the One Plan Approach to make the best informed, feasible and implementable decisions, and to share a level of joint ownership over the final publication and success of implementation.
- c. Any additional relevant people (e.g. colleagues from other zoo associations are not standardly invited to EAZA RSP workshops, but in case this is opportune because of meeting overlap or in case there is a global process preceding the EAZA RSP, they can be included)

The TAG Chairs and CPM TAG liaison develop a list of persons to invite, thereby balancing benefit versus logistic and budget implications. The location and hosting costs of the workshop are calculated on a case by case basis. The TAG Chairs send a “save” the date email as soon as it is clear where and when meeting will take place, later to be followed by a formal invitation to all potential attendees.

#### *Species Assessment Sheets*

For each of the taxa selected for detailed (re-)assessment during the RSP workshop, a species assessment sheet will be created or updated (see [Appendix 2b: Species Assessment Sheet](#)). These sheets provide the central working document for both the initial assessment of newly selected species and the re-assessment of species already managed within an EEP.

Before the workshop, information gathered on the *in situ* and *ex situ* status, the *in situ* threats and previously published *ex situ* roles/recommendations is summarised on the species assessment sheets, as is the feedback received through email consultation among *in situ* colleagues regarding potential *ex situ* roles for conservation. For previously assessed species, the information contained in the most recent RSP report and associated LTMPs is reviewed and updated where relevant, ensuring that changes in population status, threats, partnerships, policy context or feasibility are captured.

During the workshop, each partially completed species assessment sheet is reviewed and discussed. For newly selected species this forms the basis for the

generation of the list of potential direct, indirect or non-conservation roles for *ex situ* management. For previously assessed species, the focus shifts to a structured re-assessment: examining whether the existing roles remain appropriate, achievable and aligned with current conservation needs, and whether adjustments, refinements or additional roles are required. In both cases roles are evaluated against their characteristics, benefits, feasibility and risks. This role generation and evaluation process, as well as additional comments and the final recommendations are added to each taxon's sheet.

Selected roles should be Specific, Measurable, Achievable, Relevant and Timebound (SMART), and they must be included and actioned through the LTMP process. Nice to have actions that are not a main priority or that are not specific to a given species can be captured as a 'support activity', however these will merely be suggestions, and will not be actioned or measured for implementation. Details on the methodology for each of these process components can be found below.

### **IUCN *Ex situ* guidelines STEP 1: Conduct a thorough status assessment (of both *in situ* and any known *ex situ* populations) and threat analysis**

#### ***In situ* status and threats**

For each taxon, the IUCN Red List category of threat, complemented (where relevant) by the European and Mediterranean IUCN Red List category of threat, the EU Habitat Directive listing, the Global and EU CITES (Convention on International Trade in Endangered Species) listing and the CMS (Convention of Migratory Species) listing and the population trend; as well as a brief summary of the status, range and threat information should be recorded on the species assessment sheet.

In order to apply the IUCN *ex situ* guidelines and more precisely identify *ex situ* roles that best address the threats and challenges faced by the taxon, it is important to not merely consider the status/category of threat, but to also summarise the main threats faced by each taxon, extracted from relevant published sources such as full Red List accounts, BirdLife accounts, publications, and/or by consulting *in situ* stakeholders.

#### ***Ex situ* status**

According to the OPA, the status of not only the *in situ* but also any *ex situ* populations should be taken into consideration when identifying and evaluating potential conservation strategies for a taxon, in order to take account of the full range of possibilities.

Regardless of whether a Species Plan is conducted at a global, regional or national level, the status of *ex situ* populations in both EAZA and other regions should be considered as this is relevant to decisions concerning division of responsibilities between regions and potential for collaboration.

Whenever available and sufficiently reliable, the following population parameters are to be recorded for each population:

- Population size (males. females. Unknown sex);
- Number of holding institutions;
- Number of living wild-born individuals;
- Percentage of the pedigree that is known;
- Number of founders (unrelated wild born individuals with living descendants);
- Number of potential founders (living unrelated wild born individuals without living descendants);
- Current gene diversity retained (% of the wild source population);
- Potential gene diversity retained (% of the wild source population);
- Long-term growth rate (Lambda from the last \_\_\_\_ years); which time period is relevant for a long term lambda will depend on the population in question;
- Short-term growth rate (Lambda from the last 3 years);
- Level of programme management within the region (e.g. EEP, SSP, studbook, none);
- Data source (e.g. EAZA studbook, SSP breeding and transfer plan, ALPZA survey, etc.);

When a parameter is not available, cannot be calculated or is insufficiently reliable due to data quality issues a “?” should be recorded. When more than one data source is available for a region (e.g. an international and regional studbook), the most current and comprehensive source should be selected to complete the *ex situ* status for that region.

For EAZA populations, the EEO will use the ZIMS for Studbook databases, the ZIMS for Husbandry database (for non-managed species) or other data sources submitted by the TAG (e.g. for *ex situ* populations in partner organisations) to fill in the *ex situ* summary table in each of the species sheets within the RSP draft document (where necessary in consultation with the EEP Coordinator). If a species is held in other regions with regional or national zoo associations, the EAZA TAG Chairs will ask the TAG Chairs of the other regions holding this species if there is some form of managed programme for this species in their region and if there are any existing population data or analyses for the species in their region that could be shared with EAZA (e.g. masterplans, breeding and transfer plans, year reports, survey reports, published studbooks, etc). Whatever is the most recent source that holds most of the data needed in the species sheet *ex situ* status table should be chosen. The TAG liaison supports where relevant. The TAG Chair passes the information received on to the assigned (Associate) Population Biologist who summarises the information in the table on the species sheet. Where no programs exist, the assigned EEO will look up the ZIMS population numbers for these regions. The TAG liaison will also check with the TAG Chairs if they are aware of important *ex situ* holdings that are not regional/national zoo associations or ZIMS institutions and that are very relevant to the decisions to be taken for the EAZA RSP.

The *ex situ* status of the taxon should be summarised in a few lines above the *ex situ* status table.

## **IUCN *Ex situ* guidelines STEP 2: Identify potential roles that *ex situ* management can play in the overall conservation of the species.**

### ***Potential ex situ roles***

Under the principle of the OPA, *in situ* and *ex situ* specialists should jointly evaluate which are the most appropriate actions to save a species, and within that, if there are direct or indirect roles for *ex situ* conservation. However, in the context of an RSP workshop where a large number of taxa is being evaluated at the same time, it is not possible or effective to invite all *in situ* specialists for all the taxa. To ensure that *in situ* perspectives are meaningfully incorporated despite these practical constraints, relevant *in situ* specialists are consulted ahead of the workshop using a range of engagement approaches, selected to best suit the taxa, the stakeholders involved and the available expertise. These approaches may include targeted email consultation, structured surveys, bilateral or small-group calls, or direct participation in (parts of) the RSP workshop, including online attendance where appropriate. Regardless of format, a key objective of this engagement is to ensure that *in situ* colleagues have a

clear understanding of the EAZA RSP process and of the specific input sought regarding potential *ex situ* roles.

Using the knowledge of the TAG, EEO, and the relevant IUCN SSC Specialist Groups or other conservation bodies (e.g. BirdLife), *in situ* specialists working with particular taxa should be identified. These specialists are invited to provide input on potential direct and indirect conservation roles for *ex situ* activities within the conservation needs of the species of their expertise. Input should ideally be sought for both threatened and non-threatened taxa because a) there might be recent changes in status and threats that are not yet reflected in the IUCN Red List and b) non-threatened species can play a role in the conservation of threatened species, for example as model species. For TAGs with a large number of species it is likely only feasible and relevant to seek input concerning those taxa selected for detailed species assessments during the EAZA RSP workshop (see “defining the scope of the RSP” above).

Whether *in situ* specialists are invited to join the RSP workshop (in person or online) or are engaged through other means (e.g. through email consultation, calls and/or survey) it remains essential to ensure shared understanding of the RSP framework to enable focused, effective contributions.

To support consistent understanding and high-quality input, engagement with *in situ* specialists should be underpinned by the proactive sharing of relevant background and guidance materials. These materials are intended to ensure a clear understanding of the EAZA RSP process, the rationale behind assessing *ex situ* roles, and the type of input sought, and should be adapted to the chosen engagement format (e.g. calls, targeted consultations, workshop participation).

The guidance should contain the following:

- an introductory briefing (written or verbal) explaining the EAZA RSP process, its objectives, and how *in situ* input informs the assessment and (re-)assessment of *ex situ* roles;
- guidance defining and describing the different kinds of direct, indirect and non-conservation roles (see [Appendix 2c Standard RSP role descriptions](#)).
- an advanced draft of the relevant taxon sheet(s) with the summary of the *in situ* status and threats, the *ex situ* status and any previously published *ex situ* roles or recommendations (see ‘prior *ex situ* recommendations’ below).

All input received from *in situ* specialists should be summarised on the relevant species assessment sheets and a list of all the *in situ* colleagues that provided feedback included as an appendix to the RSP publication.

### **Prior *ex situ* recommendations**

With the help of TAG, EAZA, CPSG and the relevant IUCN SSC Specialist Groups or other conservation bodies (e.g. BirdLife), most recently published conservation strategies and action plans for the taxa within the scope of the RSP should be gathered and consulted to extract (or update) any existing *ex situ* recommendations or mandates. This includes documents such as regional, national or local governmental plans, IUCN SSC Specialist Group plans, CPSG Population and Habitat Viability Assessments (PHVAs), CPSG Conservation Assessment and Management Plans (CAMPs), plans by international or local NGOs or conservation alliances, etc.

Information on any existing *ex situ* recommendations or mandates should be summarised on the species assessment sheets.

### **Suggested preparation timeline**

A detailed timeline for the pre-RSP workshop preparations is available from the TAG liaisons at the EAZA Executive Office.

### RSP workshop

Two weeks before the start of the EAZA RSP workshop the participants should be presented with:

- a. the species assessment sheets, which included for each taxon:
  - the summary of the *in situ* status and threats;
  - the *ex situ* status;
  - any previously published *ex situ* roles or recommendations;
  - potential *ex situ* conservation roles identified through the pre-workshop survey.
  
- b. a workshop manual containing information that needs to be read before the workshop and also be readily at hand during the workshop. Examples of such manual are available from the EAZA Executive Office.

For each taxon within the scope of the RSP the following process should be followed:

- a. Presentation and review of the *in situ* status and threats, prior *ex situ* roles suggested in existing strategies/action plans, potential *ex situ* roles summarised from the role survey among *in situ* specialists, and of the *ex situ* status. Suggested comments/changes/ additions are recorded.

- b. Facilitated group discussion on the potential direct, indirect and non-conservation roles that may be applicable to this taxon (in view of the information presented under 1.); potential roles should be recorded in the relevant tables of the species assessment sheets.
- c. When species have been previously assessed, the consistency corrections have to be agreed upon, the progress on the roles needs to be discussed, as well as the decision to continue managing the species.

**IUCN *Ex situ* guidelines STEP 3: Define the characteristics and dimensions of the programme needed to fulfil the identified potential conservation role(s).**

- d. Facilitated group discussion regarding very broad characteristics and dimensions of the *ex situ* population needed to fulfil the identified potential role(s). Suggested characteristics should be recorded in the relevant tables of the species assessment sheets.

**IUCN *Ex situ* guidelines STEP 4: Define the resources and expertise needed for the *ex situ* management programme to meet its role(s) and appraise the feasibility and risks.**

- e. Facilitated discussion on, and rating of, the benefit, feasibility (considering, for example, existing *ex situ* population, husbandry challenges, technical or logistical challenges, availability of skilled staff, availability of sufficient financial, present and required holding space and other resources) and risk (considering e.g. sensitivity to catastrophes, consequences for wild population, occupying *ex situ* space for other species that need it more, human health and safety risks, political risks, risks for social or public conflicts) of each proposed role. Ratings and associated comments are recorded on the species assessment sheet.

**IUCN *Ex situ* guidelines STEP 5: Make an informed and transparent decision as to which *ex situ* roles and activities (if any) to retain within the overall conservation strategy of the species**

- f. Based on the above facilitated reaching of consensus on:
  - a. Which *ex situ* role(s) are recommended for the taxon in general
  - b. Which *ex situ* role(s) are recommended/relevant for the taxon in the EAZA region and whether it is feasible to deliver this in the EAZA region.

For those taxa for which one or more roles is recommended for the EAZA region, one of the following EAZA RSP Categories should be assigned:

<b>CATEGORY</b>	<b>DESCRIPTION</b>
EEP	EAZA Ex situ Programme. The taxon needs proactive management to fulfil its specified roles. This includes programmes that require proactive management to phase out the taxon or replace it with one or more other taxa. For new EEPs an EEP application form should be completed specifying the characteristics of the EEP.
MON-T REPLw	The TAG will monitor the replacement of this taxon with one or more other taxa (specify which).
MON-T Phase out	The TAG will monitor the recommended disappearance of this taxon from the EAZA Membership.
MON-T DNO	The taxon is currently not present in EAZA collections and is not recommended to be obtained in EAZA collections. Its presence/absence will be monitored by the TAG.
MON-T	The taxon is present in the EAZA Membership and while there is no specific role for the taxon (with associated management), there is also no active recommendation to replace or phase out the taxon. The TAG will monitor the numbers of this taxon in the EAZA Membership.

The rationale behind the decision to recommend a particular EAZA RSP category to a taxon should be described under “programme decision statement” on the species assessment sheet.

At the end of the EAZA RSP workshop, the complete list of programmes recommended for an EEP should be reviewed with regards to the feasibility of delivering on this number and type of programmes within the EAZA region. This review includes consideration of overall space availability, the characteristics of the programmes mentioned during the role evaluation at the workshop, and the human and other resources required for implementation.

Building on experience gained and looking ahead, feasibility should be treated as an explicit and constructive element of RSP workshops. It should be addressed as a specific agenda item, and a section on feasibility should be

included in the RSP report. The TAG holds primary responsibility for assessing feasibility and for articulating how the proposed set of programmes can be implemented in practice. Facilitators from the EAZA Executive Office (EEO) play a key role in guiding this discussion, helping to place feasibility considerations in the broader context of EAZA's population management framework and the strategic expectations of the EEP Committee, and ensuring consistency across RSPs.

The EEP Committee is responsible for reviewing the feasibility assessment and for endorsing the resulting RSP decisions, or where needed providing guidance to refine them, as part of the RSP approval process. Any changes to the roles, governance and set up of existing EEPs will be documented and highlighted in the updated RSP report, that will be tabled for approval by the EEP Committee.

At the end of each species assessment sheet; a description in sentences of all the roles selected for a particular should be inserted under "Role description for potential EEP". If time is short during the RSP workshop this can be completed after the workshop through email consultation.

For each new EEP that is recommended in an RSP an EEP application template needs be completed (see section "changes to, and approving new, EEPs" below). If time is short during the RSP workshop, at least one or two EEP application templates should be completed as a group in order to allow the TAG members/RSP workshop participants to become familiar with the template and to make it possible for the EEO staff facilitating the RSP workshop to provide extra guidance and explanation regarding the questions on the template. Additional EEP applications can then be completed after the workshop through email consultation.

### ***Post RSP workshop***

Following the RSP workshop, the TAG liaison will coordinate the tasks to be carried out by the different RSP team members (TAG Chairs (and/or appointed TAG members), population biologist, associate population biologist, TAG liaison) to produce a first draft of the RSP publication following the RSP standard format in [Appendix 2a: EAZA Regional Species Plan, standard format](#). Following review of the draft by all the TAG members and the RSP workshop participants, the TAG approved version of the RSP needs to be submitted to the EEP Committee for approval.

RSPs are published on the TAG workspaces of the EAZA Member Area and the publication of a new RSP is announced through the monthly EAZA eNews. A public-facing version of the RSP will be made available on the EAZA website.

An RSP is a living document and will be evaluated and updated at regular intervals, normally every ~5 years. EAZA Members are strongly encouraged to follow the recommendations from the RSP and to focus their institutional species plans on recommended species. Please see [chapter 4 Institutional population management](#) for information on institutional species planning.

## 2.3 EAZA Best Practice Guidelines

Good animal husbandry is a pre-requisite for good population management. Therefore, EAZA Best Practice Guidelines should be developed for all EEP species as defined in the RSP (Regional Species Plan). EAZA Best Practice Guidelines aim at optimal conditions for well-being and reproduction of all animals in the population of the species. [Note: optimal reproduction does not always indicate maximum reproduction. Rather it indicates levels of reproduction optimal to management of the population, which in some instances may involve birth control.]

### 2.3.1 Process, status and publication

Preparation of EAZA Best Practice Guidelines is the responsibility of the relevant EAZA Taxon Advisory Group (TAG) together with the EEP Coordinator and the Species Committee. Appointed TAG and EEP advisors, e.g. veterinary advisors, should be part of the development process looking to ensure the guidelines are considering available expertise as well as peer-reviewed publications. Wherever relevant, TAG members should join efforts to prepare EAZA Best Practice Guidelines for the taxon as an entity, so that only species-specific details need to be added for the individual recommended species. In this task TAGs may seek assistance from other experts. TAGs are advised to collect Best Practice Guidelines which may already have been prepared in other regions, as a basis for drafting guidelines for their own species. EAZA Best Practice Guidelines should ideally follow the available template for the publication of EAZA Best Practice Guidelines (See [Appendix 4: EAZA Best Practice Guidelines template](#)).

Subsequent drafts are sent to the members of the TAG and Species Committees and compilers, and their input is included in the guidelines whenever feasible. The final draft is sent to all TAG members for approval (which is obtained by simple majority of votes). The approved version should be sent to the EAZA Executive Office together with a confirmation from the TAG Chair. When external partners have been involved in the production of the BPGs, they have to agree on the publication, reflecting that it has been a collaborative effort. The TAG needs to have confirmation from these partners. The TAG Chair is encouraged to

mention this in his confirmation to the EEP Committee, but the EEP Committee does not require a separate letter. The EAZA Executive Office (EEO) will liaise with the Best Practice Guidelines subgroup of the EEP committee for a final review. The EEP Committee, through its Best Practice Guidelines subgroup, will review incoming BPGs and decides if the process as outlined above has been followed correctly and as such, whether the BPGs are up to standard. Once approved by the EEP Committee, the TAG will be informed and requested to make the final version available free of charge to all present and future holders. All EAZA Best Practice Guidelines will be published, including the approval date of the EEP Committee on the front cover and a DOI added, on the EAZA website and availability will be announced to the Membership at large (e.g. through the EAZA e-News and social media).

EAZA Best Practice Guidelines are owned by the EAZA community.

Best Practice Guidelines are living documents. Minor updates of officially approved Best Practice Guidelines, do not require renewed approval by the EEP Committee as long as they are supported by the TAG. The TAG and EEPs are encouraged to regularly (e.g. once every five years) review the guidelines. Reviewed editions of the Best Practice Guidelines do require renewed approval of the EEP Committee.

Whenever relevant TAGs are requested to produce relevant taxa specific and more detailed guidelines under the framework of the EAZA standards on the use of animals in public demonstrations, as included in the EAZA Standards for the Welfare, Accommodation and Management of animals in zoos and aquariums (2024). These can be included as part of the BPG or be developed as a separate document. When produced as a separate document these taxa specific guidance on animals in public demonstrations will be subject to the same process and procedure as described above for EAZA Best Practice Guidelines.

All EAZA Members should follow the EAZA Best Practice Guidelines and - whenever necessary- should make improvements or adjustments within a reasonable period of time. EAZA Members should take note of the 'EAZA Best Practice Guidelines disclaimer' as well as the 'Preamble' for more details on liability and status of EAZA Best Practice Guidelines in relation to minimum standards (See [Appendix 4: EAZA Best Practice Guidelines template](#)).

## **2.4 Procedures to approve new/changes to TAGs**

EAZA TAGs and EAZA Ex situ Programmes are bodies that are an integral part of the institutional and governance structure of EAZA as an association. TAGs and

EEPs operate within EAZA's organisational framework. The ultimate authority over TAGs and EEPs lies with the EEP Committee and any decision on the establishment, governance and oversight of TAGs and EEPs will be taken by the EEP Committee, including but not limited to decisions which TAGs and EEPs are established and maintained, their taxonomic scope, and decisions on the appointment, continuation and removal of TAG Chairs and EEP Coordinators. Operational day-to-day decisions will be taken by the TAGs and EEPs respectively in accordance with the procedures outlined in Chapters 2 and 3.

A number of documents specific to the initiation and establishment of a new TAG needs to be submitted to the Chair of the EEP Committee (via the EAZA Executive Office) before being forwarded to the members of the EEP Committee for their consideration (see section 2.4.1). The EEP Committee appoints TAG Chairs and TAG Vice chairs, as nominated and put forward by the TAG membership through the TAG Chair or TAG Vice chair, or when not in place, through the EAZA Executive Office.

The EEP Committee appoints TAG (Vice) Chairs in their individual capacity based on an assessment of their individual professional expertise. The TAG (Vice) Chairs exercise their functions in the interests of the EAZA Population Management Structure (including TAGs and EEPs) as part of the EAZA organisation. The role of the TAG (Vice) Chair is separate from and independent of any Member institution with which the appointee may be affiliated. Notwithstanding the personal and independent nature of the appointment, appointees are required to provide a written declaration of support from a Full, Associate or Temporary EAZA Member confirming that the appointee has access to appropriate resources to fulfil the role of TAG (Vice) Chair.

In the event that a TAG (Vice) Chair ceases to have such support from an EAZA Member (whether through a change of employment or for any other reason) the affected individual shall be afforded a period of three (3) months to obtain written support from an alternative EAZA Member. In the scenario that (i) such alternative support is not obtained within the aforementioned three-month period, or (ii) a TAG (Vice Chair) chooses to step down, or (iii) the EEP Committee decides that a new appointment is necessary (including but not limited to reasons of lack of activity or malperformance), the EEP Committee will invite the TAG to suggest a successor in accordance with the procedures.

TAG Chairs are appointment by the EEP Committee for a period of five years. Appointment is limited to two consecutive five-year terms. After these two terms a TAG Chair cannot be re-elected for another five-year term. TAG Chairs cannot be elected as TAG Vice chair. Past Chairs are encouraged to remain involved as

TAG advisor after completion of their term(s). In exceptional cases the EEP Committee may decide to allow a TAG Chair to be eligible for a third five-year term. TAG Chairs that have completed their second five-year term may be elected as TAG Chair or TAG Vice chair of another TAG.

TAG Vice chairs are appointed by the EEP Committee for a period of five years. A TAG Vice chair may be appointed at the same time as the TAG Chair, however, this is not a necessity for example in order to maintain continuity in the TAG or when a Chair steps down during their term of office. Appointment is limited to two consecutive five-year terms. After these two terms a TAG Vice chair cannot be re-elected as Vice chair. TAG Vice chairs can be elected as TAG Chairs either after completion of their term(s) or when a TAG Chair steps down during the five-year period. In exceptional cases the EEP Committee may decide to allow a TAG Vice chair to be eligible for a third five-year term. TAG Vice chairs that have completed their second five-year term (and do not become the TAG Chair) may be elected as TAG Chair or TAG Vice chair of another TAG.

TAG (Vice) Chair elections are coordinated by the relevant TAG liaison at the EAZA Executive Office. The TAG Chair and TAG Vice chair elections process started in 2020. TAGs. All TAG Chairs that are elected according to this new process may be elected for two five-year terms, regardless of whether they might have been the TAG Chair prior to the first election under this new procedure. Elections will follow the same schedule as put in place for the RSPs so that the TAG Chair and TAG Vice chair election take place more or less in between two RSP processes.

#### **2.4.1 Changes to, and establishing new, TAG**

Proposal for a new TAG (as a split-off from an existing TAG or merging of two existing TAGs)

- a. A proposal that outlines the scope and aims of the TAG, structure, potential members and so on (see [2.1 TAG working procedures](#)).
- b. A letter of support from the existing TAG(s) that currently covers the taxonomic group(s) that will be covered by the new TAG.
- c. A letter from the proposed new TAG (Vice) Chair stating their willingness to take on this position.
- d. A letter from the director or CEO of the institution that supports the proposed (Vice)Chair of the new TAG, stating that the institution will provide the Chair with all the necessary support to carry out the tasks

involved with the position (see [Appendix 7a: Example letter of confirming support to a TAG \(Vice\) Chair](#)).

Proposal to appoint a Vice chair's position to an existing TAG

- a. A letter from the TAG Chair explaining the task division between them and the Vice chair(s).
- b. A letter from the proposed Vice chair stating their willingness to take on this position.
- c. A letter from the director or CEO of the institution that supports the proposed new TAG Vice chair, stating that the institution will provide the Vice chair with all the necessary support to carry out the tasks involved with the position (see [Appendix 7a: Example letter of confirming support to a TAG \(Vice\) Chair](#)).

Proposal to re-appoint an existing TAG (Vice) Chair because of their move to another institution

- a. A letter from the director or CEO of the institution that will support the (Vice)Chair of the TAG, stating that the institution will provide the (Vice) Chair with all the necessary support to carry out the tasks involved with the position (see [Appendix 7a: Example letter of confirming support to a TAG \(Vice\) Chair](#)).

Proposal to replace an existing TAG (Vice) Chair

- a. A letter from the out-going TAG (Vice) Chair stating their willingness to hand the position over to the proposed new TAG (Vice) Chair.
- b. A letter from the proposed new TAG (Vice) Chair stating their willingness to take on this position.
- c. A letter from the director or CEO of the institution that supports the proposed new TAG (Vice) Chair, stating that the institution will provide the Chair with all the necessary support to carry out the tasks involved with the position (see [Appendix 7a: Example letter of confirming support to a TAG \(Vice\) Chair](#)).

## **2.4.2 Decision making procedure**

Proposals for changes to, and establishing new, TAGs can be forwarded to the EEP Committee via the relevant TAG liaison at the EAZA Executive Office. As soon as all relevant documentation has been received in satisfactory order the

proposal will be circulated among the members of the EEP Committee, who will decide within two weeks. The EAZA Executive Office will inform the TAG about the outcome within two weeks after the decision was made.

### **2.4.3 EEP and TAG roles and GDPR compliance**

In order for EAZA to be compliant with the EU General Data Protection Act (GDPR)<sup>i</sup> to the Association needs to ensure that there is an active consent (opt in) to keep personal information like contact details from any person working in an EAZA role (TAG Chair/Vice chair/member, EEP Coordinator, or any member of a Committee or working group). This 'opt in' option has been automatically built in to the process of setting up a Member Account to access the EAZA Member Area. If, for whatever reason, someone does not provide consent for EAZA holding their data, then they cannot be a TAG chair/vice chair, EEP coordinator or hold any of the other EAZA roles.

For external colleagues, that are not employed by an EAZA Member, a Non-Disclosure Agreement (NDA) must be signed before a Member Area Account is created.

<sup>i</sup>For background information please visit the EU Commission website. This website provides information for businesses and organisations and the outlines the rights of EU citizens. For a quick overview of the GDPR principles please refer to [this website](#).

## **2.5 Procedures to approve new/changes to EEPs**

EAZA Ex situ Programmes (EEPs) are bodies that are an integral part of the institutional and governance structure of EAZA as an association. EEPs operate within EAZA's organisational framework and are subject to EAZA's governance. The EEP Committee shall exercise exclusive and final decision-making authority over EEPs. This means that the EEP Committee is ultimately responsible for any decisions on the establishment, operation, governance and oversight of the EEPs, including but not limited to, decisions on the initiation and discontinuation of EEPs, their structure, as well as the appointment and removal of the EEP Coordinators and EEP Vice Coordinators.

The relevant TAG shall have the authority to nominate species for the establishment or discontinuation of EEPs. Such nomination shall be subject to formal approval by the EEP Committee. Similarly, the relevant TAG shall propose candidates for appointment as EEP Coordinators and EEP Vice Coordinators, and

may recommend the removal of individuals from such positions. The appointments and removals shall be subject to the approval and final decision of the EEP Committee, which retains sole authority to make such determinations.

EEPs are hosted by an institution that is a Full- Temporary- or Associate EAZA Member. The EEP hosting institutions do this on behalf of and under the authority of EAZA and they have an important responsibility, contributing to the successful running of the EEP and the performance of the EEP Coordinator. Notwithstanding any hosting arrangement, ownership of the EEP, together with all associated governance rights and decision-making authority remains with EAZA. EEP Coordinators typically are employees of the EAZA Member hosting the EEP. However, in exceptional cases the EEP Committee may appoint other individuals into this role (that are not employed by an EAZA Member), provided the EAZA Member hosting the EEP provides institutional support to that individual for performing as EEP Coordinator, and provided there are no conflicts of interest (see section [3.8.7 Conflicts of interest](#)), or other concerns.

When an EEP Coordinator leaves the service of the hosting institution (for whatever reason), the institution may propose a candidate successor from among its staff to the TAG. When the TAG supports this candidate, it will proceed with proposing the candidate to the EEP Committee for approval. If the TAG has reason to oppose the candidate successor that is proposed by the institution, it may decide to nominate another candidate (from the hosting institution or another EAZA Member) for EEP Committee approval. In such cases the TAG should inform the EEP Committee about both candidates, after which the EEP Committee will decide on the EEP hosting institution and EEP Coordinator based on prior consultation with the current hosting institution and the TAG. When an EEP hosting institution does not propose a candidate from among its staff in a timely fashion to meet the deadline below, the EEP Committee will invite the relevant TAG to propose a successor from another EAZA Member. In that case the original EEP Coordinator may be reappointed (e.g. when they enter the service of another institution that is a Member of EAZA). The process of (re)appointing a (new) Coordinator should be completed as soon as possible and in any case within a two month period.

A number of documents need to be submitted with the proposal to establish a new EEP or changes to existing programmes. The necessary documentation differs for each proposal (e.g. the necessary documentation for a new EEP is different from the documentation that is needed for a proposed change of a EEP Coordinator). The remainder of this chapter summarises the different kinds of proposals as well as the documentation that is needed to complete each

proposal. Standard forms and sample letters that can be used in putting together the proposal are referred to when applicable.

### 2.5.1 Changes to, and approving new, EEPs

Documentation needed for a proposal for establishing a new EEP:

- a. A completed EEP application template that outlines the aims of the proposed EEP, the structure and so on. Under normal circumstances this information is derived from and aligned with the most recent RSP. In some cases, this might however not be practically feasible, and in such cases the EEP application template can be completed and submitted independently from the RSP (see [Appendix 3: Template for proposing a new EEP](#) ).
- b. A letter of support from the TAG Chair for the proposed new EEP coordinator elaborating on the process of selecting the candidate (see [Appendix 7d: Example letter for providing TAG support for EEP Coordinators](#)).
- c. A letter from the proposed new EEP coordinator stating their willingness to take on this position.
- d. A letter of support from the director or CEO of the EAZA Member hosting institution that employs the proposed coordinator of the new EEP, stating that the institution will provide the coordinator with all the necessary support to carry out the tasks involved with the position (see [Appendix 7b: Example letter of providing institutional support to an EEP \(Vice\) Coordinator](#)).

Documentation needed for a proposal to re-appoint an existing EEP Coordinator because of their move to another institution:

- a. A letter from the director or CEO of the previous hosting institution that employed the EEP Coordinator stating their willingness to withdraw the institutional support to the EEP (see [Appendix 7c: Example letter of withdrawing institutional support](#)).
- b. A letter of support from the director or CEO of the EAZA Member hosting institution that will employ the EEP Coordinator, stating that the institution will provide the Coordinator with all the necessary support to carry out the tasks involved with the position (see [Appendix](#)

[7b: Example letter of providing institutional support to an EEP \(Vice\) Coordinator\).](#)

- c. A letter of support from the TAG Chair for the proposed new EEP Coordinator and hosting institution elaborating on the process of selecting the candidate for the EEP (sub)species (see [Appendix 7d: Example letter for providing TAG support for EEP Coordinators](#))

Documentation needed for a proposal to replace an existing EEP Coordinator

- a. A letter from the director or CEO of the institution of the out-going EEP Coordinator stating their willingness to withdraw the institutional support to the EEP (see [Appendix 7c: Example letter of withdrawing institutional support](#)).

*Applicable only if the new Coordinator is employed by another institution as where the out-going Coordinator was employed.*

- a. A letter from the proposed new EEP Coordinator stating their willingness to take on this position.
- b. A letter of support from the director or CEO of the EAZA Member hosting institution that employs the proposed new EEP Coordinator, stating that the institution will provide the Coordinator with all the necessary support to carry out the tasks involved with the position (see [Appendix 7b: Example letter of providing institutional support to an EEP \(Vice\) Coordinator](#)).
- c. A letter of support from the TAG Chair for the proposed new EEP Coordinator elaborating on the process of selecting the candidate for the EEP (sub)species (see [Appendix 7d: Example letter for providing TAG support for EEP Coordinators](#)).

Documentation needed for a proposal to discontinue an EEP

- a. This follows from the EEP Committee decision to approve the TAG's RSP, which will include which EEPs will be discontinued and why. Or otherwise, a letter of explanation from the TAG that covers the EEP (sub)species is required.

## **2.5.2 Changes to, and approving EEP Vice coordinators**

Day-to-day responsibility for the EEP lies with the hosting institution and EEP Coordinator. The Vice coordinator position is a supporting role. The Vice

coordinator position is tied to the institution, so institutional support is needed when the Vice coordinator is first proposed or when the Vice coordinator is moving institutions and want to continue in the role. In the latter case the former institution would need to withdraw institutional support first. It is the TAG's responsibility to consult with the EEP Coordinator and indicate in the TAG support that they are in support of the appointment of the Vice coordinator role. Preferably the role deviation between both positions should be covered in the TAG support letter as well. If the EEP Coordinator position becomes vacant, the hosting institution may nominate a candidate successor to the TAG. It falls within the mandate of the TAG, to arrange for a Vice coordinator to step in for the interim period, until a new EEP Coordinator, and if applicable, a new hosting institution, is approved by the EEP Committee. If the hosting institution withdraws their institutional support, or in case the TAG has concerns with regards to the suitability of the proposed successor by the hosting institution, the Vice coordinator may be proposed as a potential candidate to take over (this is not the default decision, as other potential coordinators and hosting institutions may also put themselves forward to the TAG). Separate EEP Committee approval and renewed institutional support and TAG support would be required.

Documentation needed for a proposal to appoint a new EEP Vice coordinator

- a. A letter from the proposed new EEP Vice coordinator stating their willingness to take on this position.
- b. A letter of support from the director or CEO of the institution that employs the proposed new EEP Vice coordinator, stating that the institution will provide the Vice coordinator with all the necessary support to carry out the tasks involved with the position (see [Appendix 7d: Example letter for providing TAG support for EEP Coordinators](#)).
- c. A letter of support from the TAG Chair for the proposed new EEP Vice coordinator elaborating on the role division between both positions and providing confirmation that the appointment is supported by the EEP Coordinator (see [Appendix 7b: Example letter of providing institutional support to an EEP \(Vice\) Coordinator](#)).

Documentation needed for a proposal to reappoint an existing EEP Vice coordinator because of their move to another institution

- a. A withdrawal letter from the Vice coordinator's supporting institution.
- b. A letter of support from the director or CEO of the EAZA Member institution that will employ the EEP Vice coordinator, stating that the

institution will provide the Vice coordinator with all the necessary support to carry out the tasks involved with the position (see [Appendix 7b: Example letter of providing institutional support to an EEP \(Vice\) Coordinator](#)).

- c. A letter of support from the TAG Chair for the reappointment of the EEP Vice coordinator (see [Appendix 7d: Example letter for providing TAG support for EEP Coordinators](#)).

### **2.5.3 Decision making procedure**

Proposals for changes to, and establishing new, EEPs can be forwarded to the EEP Committee via the relevant TAG liaison at the EAZA Executive Office. Once all required documentation has been received and deemed satisfactory, the proposal will be circulated to the members of the EEP Committee, who will decide within two weeks. The EAZA Executive Office will inform the TAG and Coordinator about the outcome within two weeks after the decision was made.

Should circumstances require, (including cases of lack of activity, malperformance, poor EEP evaluation results, complaints and conflicts of interest) the EEP Committee retains the right to make any additional decisions relating to the appointment or removal of EEP Coordinators, EEP Vice coordinators and/or hosting institutions, as appropriate.

## 3 Working procedures for EEPs

This chapter describes the working procedures for EAZA Ex-situ programmes (EEP). Obviously, these procedures are relevant for EEP Coordinators, but these are equally relevant for Species Committee members and EEP participants.

### 3.1 Initiation and establishment of an EEP

In order to establish a newly approved EEP, the EEP Coordinator takes the following chronological steps:

- a. Contact the holders:
  - Inform the EAZA Members holding the species of the decision made by EAZA to initiate an EEP for the species and of your appointment as its EEP Coordinator (See [chapter 2.5 Procedures to approve new/changes to EEPs](#)) Also inform the holders that EEP working procedures are now applicable to the species and about the specific programme characteristics.
  - Ask the holders to designate one of their staff members (preferably someone with experience in keeping and breeding the species) as the holder's representative for the species and ask if this species representative is eligible for a position on the EEP Species Committee (if applicable, depending on the programme characteristics).
  - Develop a studbook dataset, which typically should be done using ZIMS for Studbooks, unless otherwise agreed in the programme characteristics. Species360 can be contacted to ask for assistance with building an initial studbook dataset in ZIMS for Studbooks, including holders' current and historic collection of the species. Also, double check for EEP participants that might not be entering data to ZIMS (e.g. when they are not a member of Species360) and add their current and historic collection to the dataset manually. Upon completion of the initial studbook dataset, contact the current and, when relevant historic, holders to check for correctness and completeness of the data in the initial studbook dataset. After this process is completed publish a current and historical studbook.
  - When contacting the institutions to check the data included in the initial studbook dataset you should also ask the holding institutions if they want to maintain the species in their collections in the future, and if so, how many individuals approximately they are willing and able to keep.

- Request a quick response and include a "please return before..." date, as the establishment of the population management programme should be completed within one year. Re-address non-respondents after one month, urgently requesting them to respond. It might take more than one reminder before all institutions have replied. When most holders have replied continue with the next steps even if some holders did not reply yet. Data of these institutions can be double checked or added at a later stage. [Inform the EAZA Executive Office and the relevant TAG Chair of institutions that recurrently do not reply.]
  - In some cases, it might be important to collect data on individual animals that are, or were, held in non-EAZA collections (e.g. for tracing pedigree information). Please see [section 3.6 Non-EAZA Members and EEP Participation](#).
- b. Unless it was decided not to have an EEP Species Committee, the Coordinator should, no later than six months after mailing the first announcement to the holders:
- Send an election form for the Species Committee, listing all species representatives who declared to be eligible, indicate the number of Species Committee members that should be elected (See also [section 3.8 The EEP Species Committee](#)), and ask the holders to return the completed form within one month.
- c. Perform a first genetic and demographic analysis of the population data included in the studbook (See also [section 3.12 Studbook analyses](#)).
- d. Organise the first meeting of the EEP Species Committee – when applicable - within twelve months after the start of the programme, to discuss:
- Goal(s) of the EEP, as defined in the Regional Species Plan.
  - The current state of affairs of the programme and identifying potential problems.
  - The population management measures to be taken in the next year (see [section 3.13 Annual breeding and transfer recommendations](#)).
  - Initiation of the process of developing a Long-Term Management Plan (LTMP – see [section 3.9 Long-Term Management Plan \(LTMP\)](#)).
  - Initiation of the process of producing EAZA Best Practice Guidelines (see also [section 2.3 EAZA Best Practice Guidelines](#)).
  - Possible division of tasks among the committee members.
  - Inform the participants of the management proposals (of the Species Committee) and start implementing these.

- e. Submit the first (preliminary) EEP annual report to the EAZA Executive Office and the relevant TAG covering the first full calendar year after approval of the programme (see [section 3.10 The EEP annual report](#)).
- f. If an International Studbook (ISB) is in place get in touch with the ISB keeper at an early stage to agree on division of tasks with regard to data collection, studbook numbers and data exchange. Whenever possible and practical it is strongly encouraged to work towards using one single dataset. In any case it should be prevented that EAZA institutions are contacted twice for the same data.

Newly appointed EEP Coordinators and Vice coordinators must participate in the Introduction to EAZA *Ex situ* Programme Management Course and attend one of the next two courses that are organised when being formalised into these positions. These courses are regularly organised by the EAZA Executive Office under the umbrella of the EAZA Academy, and deal with the scientific backgrounds of joint population management, tools for population management, the practical functioning of EEPs and the framework of zoos, institutional species planning and *ex situ* conservation. See also [chapter 5 Training/Further information](#)

If an EEP Coordinator encounters organisational or practical problems during the above-mentioned stages of initiation and establishment of a new EEP or has any questions regarding these, they are invited to contact the relevant TAG or the EAZA Executive Office for obtaining advice or further details.

## **3.2 Management of the EAZA *Ex situ* Programme after establishment**

After an EEP has been established according to the above-mentioned schedule, the Coordinator should perform the following routine tasks:

- a. Work together with the EAZA Population Management Centre (PMC) to develop a Long-Term Management Plan (LTMP) for the EEP at relevant intervals. In between the publication of the existing and next LTMP, the EEP Coordinator should work on the implementation of the LTMP and where relevant update the LTMP in cooperation with the EEP Species Committee and PMC. See also [section 3.9 Long-Term Management Plan \(LTMP\)](#).

- b. Ensure that the studbook data, as recorded in ZIMS for Studbooks, is kept up to date and of high quality. If not already recorded, remember to ask holders for additional information that is relevant for population management such as a social group setting, number of eggs laid/hatched, still births, reproductive behaviour, etc., that are not necessarily included in standard ZIMS for Husbandry reports.
- c. Analyse the population data, formulate management proposals for the current and next year in the framework of the Long-Term Management Plan (LTMP) and in light of recent developments in the population.
- d. Prepare a studbook publication, typically running from 1 January to 31 December of the previous calendar year. Distribute copies of the studbook to all participants, the EAZA Executive Office, the relevant TAG Chair and the international Studbook Keeper if applicable. Refer to [section 3.11 The studbook](#).
- e. An annual report for the preceding year is not required but maybe prepared by the EEP Coordinator in accordance with Appendix 21. These are typically submitted to the EAZA Executive Office and the relevant TAG Chair not later than 1 July.
- f. EEP Coordinators should organise meetings of the EEP Species Committee (when in place) at regular intervals according to the necessities of the programme, in order to discuss the management proposals, the development and implementation of the Long-Term Management Plan, the development of EAZA Best Practice Guidelines, research needs, and any other relevant aspects of the programme. See also [section 3.8 The EEP Species Committee](#).
- g. Maintain regular contact with the EEP participants through the year and provide timely responses to incoming request. Assist participants in solving possible problems with animals that are in need for outplacement. See also [section 3.6.5 Procedure for sending EEP animals outside of programme](#).
- h. Maintain regular contact with the relevant TAG Chair(s) in case of problems, and send copies of reports, Best Practice Guidelines, LTMPs, minutes and agendas of Species Committee meetings, samples of questionnaires, relevant correspondence and any other material relevant to the development of the programme to the TAG Chair as well as to the EAZA Executive Office.

- i. Maintain regular contact with the relevant TAG regarding the development of Best Practice Guidelines and any species-specific problems or questions.
- j. Maintain regular contact with programme leaders for the same species in other regions (for example the SSP Coordinator) and when in place the convenor of the relevant Global Species Management Plan (GSMP) and/or the International Studbook Keeper to keep aligned on relevant matters with other regional programmes or global plans for the species. Information on species management programmes in other regions can be obtained from the EAZA Executive Office.

In case the EEP or one of the EEP participants is (planning to get) involved with releasing EEP animals into the wild the EEP Coordinator and Species Committee needs to be proactive in working the TAG and other stakeholders to follow the rules and procedures as laid down in [chapter 4.3 Releasing animals to the wild](#)

- k. Archive the most relevant EEP correspondence such as agreements with institutions and publications such as studbooks, management plans, best practice guidelines, minutes of relevant meetings, etc. Please see [chapter 3.3 Handing and taking over an existing EEP](#) and [Appendix 28: Guidelines for population management programme administration and handover](#) for more information and guidance on programme administration.

When an EEP is discontinued the following steps need to be taken:

- a. Inform all holders of the discontinuation of the programme.
- b. Disband the Species Committee.

In managing their programmes, EEP Coordinators may continuously request advice from the relevant TAG, the EAZA Executive Office and other EAZA working groups relevant to specific problems or questions.

### **3.3 Handing and taking over an existing EEP**

If an EEP Coordinator discontinues as leader of the programme (for whatever reason) all documentation built up in the archive as described in point m of section 3.2 must be handed over, preferably directly to the new EEP Coordinator but otherwise to the EAZA Executive Office.

Guidelines are available to help Coordinators determine whether all essential administration is saved and available ([Appendix 28: Guidelines for population management programme administration and handover](#)). The guidelines provide general tips and a checklist with the most important topics to consider. It is essential for Coordinators to check this list periodically during their EEP Coordinator career and especially while starting with a new programme or stepping down.

Upon appointment, the EEP Coordinator should promptly contact the outgoing Coordinator and the relevant TAG to obtain the programme archive and discuss the current status of the programme. All EEP participants should be informed that there is a new EEP Coordinator. The EEP Coordinator should then continue managing the programme as described in [section 3.2 Management of the EAZA Ex situ Programme after establishment](#)).

### **3.4 EAZA Members and EEP Participation**

EAZA has the following Membership categories: Full Member, Associate Member, Temporary Member, Candidate for Membership, Honorary Member and Corporate Member (EAZA Constitution, 2025). EEP participation is not applicable to the latter two Membership categories. In this section expectations and possibilities for participation of the other Membership categories are described. [Section 3.6 Non-EAZA Members and EEP Participation deals with non-EAZA Members](#). For further general information on EAZAs Membership categories and Accreditation process please refer to the 'EAZA Membership and Accreditation Manual' [here](#).

#### **3.4.1 Full Members**

Full Members of EAZA are obligated to participate in scientifically based coordinated breeding programmes at national, European and global levels as described in the EAZA Codes, Standards, and Sanctions and further by-laws of the association (Article 11.1.d of the EAZA Constitution, 2025). EAZA Ex situ Programmes (EEPs) are EAZA's scientifically based breeding programmes which means that participation in EAZA Ex situ Programmes is obligatory for EAZA Members holding animals. This participation constitutes a binding obligation arising from membership in EAZA. Consequently, EAZA Members must abide by the EEP rules and procedures for the EEP species and specimens they hold, as well as any EEP species and specimens they acquire or that they intend to hold in the future.

As part of the ‘one size does not fit all’ philosophy, TAGs can make a case to the EEP Committee for exemptions to be made to the rule above for a given EEP. This could for example be the case for breed and releases programmes for local species, where governmental partners might want to limit participation to selective holders. Any exceptions need strong argumentation and will be considered based on the roles and goals of the population and not on individual needs of one or more institutions.

### **3.4.2 Associate Members**

Associate Membership can, at the discretion of the EAZA Council, be awarded to any individual, professional organisation or any other institution. Associate Membership can be awarded to any individual, professional organisation or any other institution located in any country, whether inside or outside of Europe (EAZA Constitution, 2025). There are EAZA Associate Members with, as well as EAZA Associate Members without, an animal collection. EEP participation is not applicable to Associate Members without an animal collection.

The EEP participation procedure for Full Members as described above is also applicable to all Associate Members holding animals, regardless of whether the Associate Member is an individual, professional organisation or other institution, and regardless of whether the Associate Member is located in the EAZA region or not.

### **3.4.3 Temporary Members**

The EEP participation procedure for Full Members as described in 3.4.1 above is also applicable to Temporary Members of EAZA. However, Temporary Members are not allowed to acquire additional EEP species, that are not yet held in the collection, without EEP Committee approval. EEPs can request approval by completing the “Standard application form for EEP participation A” ([Appendix 9: Temporary Member participation in an EEP - standard format for requesting approval from the EEP Committee - Application form A –Temporary Membership \[including Temporary Membership under construction\]](#)).

The same procedure for Temporary Members applies to ‘Temporary Members (under construction)’ which is a category for zoos and aquariums that are being newly built or in the process of complete renovation. The Members cannot acquire EEP species, that they do not yet hold (or held) at the time of becoming a Temporary Member (under construction) without EEP Committee approval.

Whilst becoming an EEP participant for species not yet in the collection whilst being a Temporary Member is exceptional and requires EEP Committee approval, the number of EEPs cannot be set at a maximum as this will depend on different factors, most importantly the existing collections upon becoming a Temporary Member and the institutional collection as reviewed during the screening process. In all cases the EEP Committee will consider the current and proposed collection when making their decisions. The decision of the EEP Committee is final.

If it is recommended by the EEP Coordinator to transfer animals to a Temporary Member, it is strongly suggested to do this on a 'on loan' basis only.

### **3.4.4 Candidate for Membership**

Candidates for Membership (CfM) are not automatically authorised to participate in EEPs (EAZA Constitution, 2025). Candidates for Membership do not meet the EAZA Standards and are several years (5 or more) from being able to reach these. The EAZA Technical Assistance Committee appoints a mentor to these institutions, who helps the institution in the process towards complying with the EAZA Standards. EEP participation will only be possible after liaising with the appointed mentor of the institution. If the mentor is in favour of non-EAZA EEP participation in a certain EEP, the participation will then need to be approved by the EEP Committee. EEPs can request approval by completing the "Standard application form for EEP participation B" (See [Appendix 10: Candidate for Membership participation in an EEP - standard format for requesting approval from the EEP Committee Application form B - Candidate for Membership](#)).

As per default, Candidates for Membership can participate in a maximum of five EEPs. This is regardless of the number of species the institution has at the time it becomes an EAZA CfM. The mentor plays an important coordinating role in this regard, liaising with the Candidate for Member and EEP Coordinators towards ensuring the maximum will not be exceeded. In exceptional cases the EEP Committee may decide to allow participation in more than five EEPs. It is expected that CfMs abide to the EAZA Acquisition and Disposition standards for all animals in their collection, as described in [chapter 4.2 Animal acquisition and disposition](#).

Candidates for Membership are not required to pay an EEP participation fee, given that they are already subject to paying the CfM fee.

### 3.5 EEP participation consequences for zoos leaving EAZA Membership

An institution ceases to be an EAZA Member either by voluntarily withdrawal from the Association or by termination of membership by decision of the EAZA Council.

If a zoo or aquarium ceases to have EAZA Membership:

- a. The EAZA Executive Office informs the EEP Coordinators about the voluntary withdrawal or the EAZA Council decision on the termination of the EAZA Membership;
- b. Institutions that leave the EAZA Membership cannot participate in any EEPs for two years after termination or voluntary withdrawal.
- c. Following expiry of the two year period mentioned under b., an EEP may consider former EAZA Members as non-EAZA EEP participants subject to EEP Committee approval and in accordance with the regular procedures (see [chapter 3.6 Non-EAZA Members and EEP Participation](#));
- d. The EEP Committee may, in its sole discretion, in certain cases (including but not limited to cases pertaining to a violation of law or EAZA procedures) decide that EEP participation will not be possible for a period of five years;
- e. An institution that ceases to be an EAZA Member cannot host an EEP or provide institutional support to a EEP (Vice) Coordinator, TAG (Vice) Chair and Vet Advisor. If a member of staff of the institution of concern is an EAZA TAG (Vice) Chair, EEP (Vice) Coordinator or Vet Advisor they must give up this task, unless otherwise decided by the EEP Committee;
- f. The relevant TAGs will identify new potential Coordinators if the institution in concern hosts one or more EEPs;
- g. Any and all correspondence and datasets pertaining to the EEPs must be handed over to the EEP Committee (c/o EAZA Executive Office) within two months after the institution has ceased to be an EAZA Member.

### 3.6 Non-EAZA Members and EEP Participation

In this section the procedure for non-EAZA institutions to participate in EAZA Ex situ Programmes (EEPs) is described. The section explicitly focusses on including

animals into EEPs that are held by parties that are not a Member of EAZA. Section 2.2 and section 3.9 describe the procedures for cooperation with partners that are not a Member in EAZA in the context of Regional Species Plans (RSP) and Long-Term Management Plans (LTMP). A decision tree for easy reference is available in [Appendix 8: Decision tree EAZA EEP participation procedure](#)

### **3.6.1 General non-EAZA EEP participation philosophy and procedure**

Participation of non-EAZA Members holding animals into EAZA Ex situ Programmes can refer to a diverse range of institutions and individuals including:

- a. Zoos and aquariums in the EAZA region;
- b. Zoos and aquariums outside the EAZA region;
- c. Private holders and private breeders;
- d. Conservation breeding centres;
- e. Sanctuaries and Rescue Centres; and
- f. Universities and Research organisations.

The need to include non-EAZA participants in an EEP is determined by the EEP's roles and objectives as set out in the TAG's Regional Species Plan and the management strategy, including population-specific goals defined in the Long-term Management Plans. There can be various reasons why participation might be important including: adding underrepresented bloodlines to the EEP; bringing husbandry expertise on board that is lacking in the EAZA Membership; adding individuals and holding space to meet demographic population targets; and/or *ex situ* conservation action that requires animals in human care to be part of one single *ex situ* management programme or framework.

In general, EAZA will look positively towards accommodating the needs of the EEPs in this regard. At the same time, the needs for the programme must be balanced with the needs of the EAZA Membership at large. EEPs are, by and large, managed, overseen and funded by EAZA Member institutions, and are an important EAZA Membership service. Therefore, non-EAZA EEP participants will be expected to pay an EEP participation fee. Non-EAZA Members cannot participate in more than five EEPs (institutions or individuals are then expected to become a Member of EAZA). The EEP Committee can decide to make an

exception to this on a case by case basis, for example for institutions or individuals that are not eligible or able to become a Member of EAZA.

Regardless of the type of non-EAZA Member as listed in the categories above, the credibility and reputation of EAZA are of key importance when considering cooperation with non-EAZA Members, particularly when considering the participation of non-EAZA Members into EEPs. To be eligible for non-EAZA EEP participation, holders should not be involved in any activities that can cause serious damage to EAZA's reputation. EAZA Members are subject to a cyclical inspection under the EAZA Accreditation Programme, whilst non-EAZA Members are not. There should be a level of guarantee that a non-EAZA EEP participant has acceptable standards both for the EEP species concerned and in general.

For the reasons outlined above the following rules and procedures will apply to non-EAZA EEP participants (applicable equally across all taxa):

- a. Non-EAZA EEP participants are expected to participate in the framework of that specific EEP in the same way as other EEP participants would (as laid down in this Population Management Manual).
- b. Standards for animal welfare, husbandry and veterinary care need to be aligned with general and species-specific EAZA standards similar to what is expected of full EAZA Members. The EEP has a responsibility to ensure this is the case with a focus on the species they request non-EAZA EEP participation approval for. In the approval process the EEP Committee might additionally consider if this non-EAZA EEP participant does not go against important EAZA principles and procedures as laid down in the EAZA Code of Ethics and Conduct (2023) and EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024).
- c. An appropriate and transparent record keeping system and means for the identification of EEP animals needs to be in place.
- d. Required legal paperwork needs to be in place (CITES, veterinary certificates, operating licence, etc.).
- e. An appropriate level of communication needs to be in place.
- f. An appropriate level of commitment to the goals of the programme from the non-EAZA EEP participant should be in place (similar to what is expected from EAZA Members).

It might in some situations be needed to visit the institution in question to be able to comfortably and understandably answer all the points above. It is important to note that approval is given for only that specific EEP, meaning that a non-EAZA Member that is approved for participation in one EEP is not automatically approved for participation in other EEPs.

It is strongly suggested to send EEP animals to approved non-EAZA EEP institutions on a loan basis, to be able to retrieve animals when applicable. **The EEP animals should furthermore not be sent to non-EAZA Members prior to EEP Committee approval**, except for 'temporary placing' an EEP animal.

The decision to 'temporary place' an EEP animal in a non-EAZA institution can be made at EEP Species Committee level and does not need official approval from the EEP Committee. The EAZA institution only needs the confirmation of the EEP. A time frame for the duration of the animal's stay at the non-EAZA institution has to be included, and this time frame needs to be related to a special event (building of a new enclosure, accommodation, etc.). Furthermore, animals must in these cases always be sent on loan to the non-EAZA institution so that they can easily be retrieved after the scheduled period, and the non-EAZA institution must provide suitable accommodation for the animal(s).

Non-EAZA EEP participants that are approved by the EEP Committee are required to sign a non-EAZA EEP participation contract. The EEP Coordinator is responsible for arranging this and getting the contract signed. A template non-EAZA EEP participation contract is available in [Appendix 13: EAZA Template contract for non-EAZA EEP participants](#).

Non-EAZA institutions can be divided in two main categories:

- a. Non-EAZA institutions in the EAZA region;
- b. Non-EAZA institutions from outside the EAZA region.

These different categories need a different approach in the framework of non-EAZA EEP participation.

### 3.6.2 Non-EAZA EEP participation: EAZA region

The following European countries are in the EAZA region:

Albania, Andorra, Austria, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Holy See (Vatican City), Hungary, Iceland, Ireland, Italy, Kosovo, Latvia, Liechtenstein, Lithuania, Luxembourg, , Malta, Moldova, Monaco, Montenegro,

Netherlands, North Macedonia, Norway, Poland, Portugal, Romania, Russian Federation, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Ukraine and United Kingdom of Great Britain and Northern Ireland.

The following Western Asian countries are in the EAZA region:  
Armenia, Azerbaijan, Bahrain, Georgia, Iran, Iraq, Israel, Jordan, Kazakhstan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, State of Palestine, Syrian Arab Republic, Türkiye, United Arab Emirates and Yemen.

The category non-EAZA institutions within the EAZA region can be split up into several subcategories:

- a. Institutions that have previously been an EAZA Member and their Membership has ended (either voluntarily, following an EAP screening or after a complaint procedure).
- b. Institutions that have been an EAZA applicant but were denied Membership.
- c. Institutions that are currently an applicant for EAZA Membership.
- d. Institutions with no (recent) history of EAZA (applicant for) Membership.

EAZA Members are published on the EAZA website. Information on other institution's status in relation to EAZA Membership can be obtained through the EAZA Executive Office.

### **Terminated Membership**

Institutions that voluntarily end their EAZA Membership cannot participate in EEPs for two years following date of withdrawal. After this two-year period EEPs can request approval from the EEP Committee by completing the "Standard application form for non-EAZA EEP participation C" (see [Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval from the EEP Committee - Application form C –Non-Member of EAZA, in EAZA region](#)).

EAZA Council may terminate the Membership of an institution (e.g. after an EAZA Accreditation Programme inspection, a complaint procedure or lack of Membership fee payment). If this occurs the institution cannot participate in EEPs for two years following the date of termination. After two years, an EEP may request approval from the EEP Committee for participation of a previously terminated Member in the EEP by completing the "Standard application form for

non-EAZA EEP participation C” (see [Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval from the EEP Committee - Application form C -Non-Member of EAZA, in EAZA region](#)). In exceptional cases (e.g. violation of law or severe breaches of EAZA procedures) the EEP Committee can decide that the previously terminated Member cannot participate in EEP for a period of five years.

See also [section 3.5 EEP participation consequences for zoos leaving EAZA Membership](#) and also [section 3.18 EEP Complaint procedure and Appendix 21: EAZA Fundraising Account Application](#).

### **Former applicant, Membership denied**

Institutions that were refused EAZA Membership after an EAZA screening mission or in the application phase cannot participate in EEPs for two years after the decision of EAZA Council. When a non-EAZA institution was approved as participant in one or more EEPs prior to the screening and the decision of EAZA Council, this participation will be discontinued.

After two years, an EEP can request approval from the EEP Committee for non-EAZA participation in the EEP by completing the “Standard application form for non-EAZA EEP participation C” (see [Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval from the EEP Committee - Application form C -Non-Member of EAZA, in EAZA region](#)).

### **Applicants for EAZA Membership**

Applicants for EAZA Membership are institutions that have applied for Membership by completing the EAZA Membership Accreditation Questionnaire and for which a decision on Membership has not yet been made by EAZA Council. Non-EAZA EEP participation requests for these institutions will be dealt with similarly to those for institutions that do not have any history of EAZA (applicant for) Membership. EEPs can request approval from the EEP Committee by completing the “Standard application form for non-EAZA EEP participation C” (see [Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval from the EEP Committee](#)).

### **No (recent) history of EAZA (applicant for) Membership**

EEPs can request approval from the EEP Committee by completing the “Standard application form for non-EAZA EEP participation C” (see [Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval](#)

[from the EEP Committee - Application form C –Non-Member of EAZA, in EAZA region\).](#)

### **3.6.3 Non-EAZA EEP participation: other regions**

This subsection deals with EEP participation of non-EAZA Members from outside the EAZA region. Please note that the EEP participation procedures for institutions outside the EAZA region that are an Associate Member of EAZA are described in [section 3.4.2 Associate Members](#)

EAZA encourages the cooperation between EEPs and population management programmes that are run by other professional regional or national zoo and aquarium associations outside of the EAZA region that are a member of WAZA. Such cooperation might range from an informal exchange of information all the way to official partnerships between two or more programmes (e.g. via a Memorandum of Understanding between two regional programmes or via a Global Species Management Plan as run under the auspices of WAZA). Refer to [section 3.6.4 EEP participation and MoU partners](#) for more information about establishing such partnerships as part of defining the roles and goals of the EEP in relation to other population management programmes as part of the EAZA Regional Species Planning process.

This section focusses only on those situations where a non-EAZA Member outside the EAZA region participates in an EEP in a similar way to any other EEP participant.

As a default procedure, non-EAZA Members outside of the EAZA region are expected to participate in population management programmes as provided by their respective regional or national association. If there is a regional population management programme for the EEP species run by a colleague regional or national association outside the EAZA region that is a member of WAZA (e.g. SSP, PMP, ASMP), EEP participation for non-EAZA Members outside the EAZA region is not possible. In cases where the non-EAZA Member is not a member of a regional or national Associations in their region, and does consequently not participate in these population management programme in their region, non-EAZA EEP participation might be applied for, but only when the request hereto is supported by the programme coordinator of that regional or national association.

If there is not such a population management programme for the EEP species in the respective region of the institution, and provided that it does not go against the region's species planning priorities, EEPs can request approval from the EEP Committee for non-EAZA participation in the EEP by completing the "Standard

application form for non-EAZA EEP participation D” (see [Appendix 12a: Non-EAZA institution participation in an EEP- standard format for requesting approval from the EEP Committee -Application form D – Non-Member of EAZA, the proposed EEP participant is located out of the EAZA region.](#)).

### **3.6.4 EEP participation and MoU partners**

EAZA has Memoranda of Understanding with colleague zoos and aquarium associations and other partner organisations (e.g. ALPZA, EAAM, EUAC). As part of such MoUs there might be more specific agreements laid down in relation to EEP cooperation (among other options, this might include non-EAZA EEP participation). In such cases the EEP Coordinators will be informed upon signing or renewing such MoUs.

### **3.6.5 Procedure for sending EEP animals outside of programme**

Although it should generally be avoided, and subject to specific rules and procedures, there can be circumstances where EEP animals can be appropriately sent outside of the framework of the EEP within the EAZA region. In this case the animals move out of the programme and are no longer managed as part of the EEP population in any way or form. It is important to stress that sending animals outside of the EEP is never an alternative to non-EAZA EEP participation and that the decision to place EEPs animal outside of the programme within the EAZA region must be made by the EEP, including Coordinator and Species Committee, and based on the roles and goals of the programme as laid down in the Regional Species Plan and Long-Term Management Plan.

Outplacing EEP animals outside the EAZA region is subject to further restrictions and subject to EEP Committee approval in case animals do not move into a population management programme of a regional or national associations that is a member of WAZA. The rules and procedures for sending animals out of the EEP within the EAZA region and outside the EAZA region are described in [3.14.4 Placement of animals out of the EEP](#).

### **3.6.6 Forwarding non-EAZA EEP participation requests**

The EEP Coordinator is responsible for coordinating the non-EAZA EEP participation request including checking the conditions as listed above, soliciting Species Committee approval (if in place) and completing and submitting the application form.

After completing the relevant standard application form the EEP Coordinator should forward it to the TAG liaison at the EAZA Executive Office for approval by the EEP Committee. If the application form was completed correctly, it will be forwarded to the EEP Committee and TAG (Vice) Chairs. The EEP Committee together with the TAG (Vice) Chairs will then review the application looking at three main elements:

- a. The needs for the EEP;
  - Follows from the role, goals and management strategy (RSP, LTMP processes).
  - TAG (Vice) Chairs will review this element.
- b. The needs for the EAZA Membership;
  - EAZA Members invest in the EEP structure, pay Membership fee, and are subject to inspection under the EAZA Accreditation Programme (EAP).
  - EEP Committee will review this element.
- c. The reputation of EAZA;
  - A non-EAZA partner should not be involved in any activities that can cause serious damage to EAZA's reputation.
  - This links to professional standards and behaviour.
  - TAG (Vice) Chairs and EEP Committee will both review this element.

The EEP Committee and TAG Chairs will have two weeks for the review process that will take place via email. The EEP Committee and TAG (Vice) Chairs will consequentially take one of the following three decisions:

**a. Approve the non-EAZA EEP participation request, pay participation fee**

There is a need to include the non-EAZA Member in the EEP, the balance with Membership needs are checked and the reputational risk (if any) considered acceptable. The non-EAZA Member must pay the non-EAZA EEP participation fee.

**b. Include in the EEP, no participation fee (only exceptional cases)**

There is a need to include the non-EAZA Member in the EEP, the balance with Memberships needs are checked and the reputational risk (if any) considered acceptable. There are valid reasons why payment of participation fee is not possible for the participant and hence payment of the fee is exempted. This

option is not supported for licensed zoos and aquariums in the EAZA region, who will always have to pay the fee.

**c. Do not include in the EEP**

The EEP Committee and TAG (Vice) Chairs are not convinced of the necessity of inclusion in the EEP and/or believes there is unacceptable reputational risk for example based on not meeting professional animal management and care standards, or negative experiences with this institution within the context of another EEP.

A non-EAZA Member outside the EAZA region (see [3.6.3 Non-EAZA EEP participation: other regions](#)) that is a Member of a regional or national association in their country or region, where that regional or national association is an Association Member of WAZA, is exempted from paying a non-EAZA EEP fee. All other non-EAZA institutions outside the EAZA region must pay the non-EAZA EEP fee, unless special conditions as mentioned under point b apply.

Within two weeks after the EEP Committees conclusion, the EEP Coordinator will be informed on the Committee's decision. The EEP Coordinator will then have to communicate this decision to the non-EAZA institution and (when applicable) explain the follow-up procedure regarding the payment of the participation fee (see [subsection 3.6.7 Non-EAZA EEP participation fee](#))

Approved non-EAZA EEP participants are eligible for a seat in the elected EEP Species Committee when such exist, however the EEP Coordinator must ensure that at least two-third of the seats are taken by EAZA Members (for more information on the Species Committee see [section 3.8 The EEP Species Committee](#)).

Non-EAZA EEP participants should be subject to periodical review, such that their participation is evaluated every five years. Non-EAZA EEP participants that fail to comply with the rules and procedures for EEP participation set out in this Chapter risk having their participation discontinued. Such decisions may be taken by the relevant EEP Species Committee or, where appropriate, by the EEP Committee, in accordance with the standard EEP complaint procedure (Section 3.18). Where a non-EAZA institution is approved to participate in multiple EEPs, the relevant EEP Coordinators must be informed of any decision affecting participation. The EEP Committee may also decide to discontinue the institution's participation in other EEPs as appropriate.

In exceptional cases, the disregard of, or actions contrary to, EEP recommendations by a non-EAZA institution, even where it is not formally

approved for the EEP concerned, may have implications for its continued participation in the EEPs for which it is approved.

### 3.6.7 Non-EAZA EEP participation fee

Non-EAZA Members that are approved by the EEP Committee as a participant in one or more EEPs are charged a yearly non-EAZA EEP participation fee. The fee depends on the number of programmes that the institution is approved for.

#### **EEP participation for non-EAZA institutions, fee structure 2026 (1 January 2026 – 31 December 2026) \*:**

- Participation in 1 EEP: €288
- Participation in 2 EEPs: €564
- Participation in 3 EEPs: €839
- Participation in 4 EEPs: €1.112
- Participation in 5 EEPs (max.): €1.386

*\* Fees will increase with 3% annually. Otherwise, the amount of the fees can be subject to change, as proposed by the EEP Committee, to be decided upon by the EAZA Executive Committee.*

Invoices will be distributed by the EAZA Executive Office once a year. The EEP Committee can decide to waive the participation fee for a non-EAZA EEP participant, in exceptional cases.

If a non-EAZA institution does not pay the obligatory EEP participation fee within six months the EEP Committee will withdraw the approval of the non-EAZA EEP participant. EEP animals might need to be retrieved for the EEP population. The non-EAZA institution cannot participate in the EEP for a period of at least two years and would need to pay outstanding fees prior to being reconsidered as non-EAZA EEP applicant after this two-year period.

### 3.7 Rules of joint population management

This section explains the rules of joint population management for all parties involved in EAZA Ex situ Population Management programmes, including the EEP Coordinators and participants.

The roles and goals of the EEP will define the characteristics of the programme. This requires a certain level of flexibility to develop these characteristics, which is part of the EEP application process. At the same time, it is important to have clear rules and procedures for the implementation of the programmes. The

EAZA Membership and other EEP participants must know what they can expect from an EEP and in turn what is expected from them as participants in the EEP.

### *3.7.1 Rules of joint population management in EEP's*

The rules for participating in an EEP are as follows:

- a. Participation in EAZA Ex situ Programmes is obligatory for EAZA Members (see [3.4 EAZA Members and EEP Participation](#))
- b. The participant commits itself to the long-term joint management of the species' population.
- c. The participant agrees to place a certain minimum number of enclosure spaces at the disposal of the programme. Sufficient notice must be given when the number of enclosure spaces will be changed including when the participant plans to cease keeping the species.
- d. Breeding and transfer recommendations for individual animals may or may not be part of an EEP. Where they are, these will be developed and agreed following a democratic process (Species Committee or otherwise).
- e. The participant will follow the recommendations of the long-term management plan and the annual breeding and transfer recommendations which are based on this plan whenever possible. If - for whatever reason - the implementation of a recommendation is considered difficult or even impossible, the participant will justify its objections to the EEP Coordinator or the Species Committee in order to enable reconsideration. EEP Coordinators should respect institutional requests and problems and consider alternative suggestions as proposed by EEP participants and try to accommodate these wherever possible and in alignment with the overall goals of the EEP. If, after this, still no acceptable solution is found, a final and binding decision may be taken by the EEP Species Committee as the representatives of all participants of the particular EEP programme. In case there are insurmountable problems with this process of deciding on, or the implementation of EEP recommendations, EEP Participants or EEP Coordinators can turn to the EEP Complaint Procedures as described in section 3.18.
- f. The participant **must** obtain EEP approval **prior** to any animal transfer to and from its collection except where such transfer is recommended in the species' management plan and the annual breeding and transfer recommendations as referred to under e. This is a particularly delicate

matter when transfers in and out of the EEP population (from and to non-EEP participants) are involved. This applies equally to EAZA Members seeking to join an EEP for a species they do not yet hold and to EAZA Members intending to discontinue the keeping of a species.

- g. Ownership should be respected in the implementation of transfer recommendations. This might for example apply to cases where EAZA Members are housing confiscated animals that would need clearing by the confiscating Authority prior to breeding or transfers in the framework of an EEP being legally allowed.
- h. The participant - although being the rightful owner of particular individuals of the EEP population - will cooperate in the species' management as if its population were common property of the entire group of participants.
- i. EEPs are non-commercial. In order to ensure the non-commercial status of EEPs any selling of EEP animals is not allowed and **must** be avoided. This also applies to any parts and derivatives including live specimens (e.g. living cells for cryopreservation purposes) and any other specimens (e.g. whole carcasses, body parts, fluids, hairs, tissue).
- j. The participant will follow the recommendations of the EAZA Best Practice Guidelines for the EEP species as closely as possible in order to guarantee optimal well-being and reproduction of the animals of this species under its care.
- k. The participant receiving a recommended EEP animal following a transport from the sender, should inform the sender that the animal(s) have arrived in good condition.

In return to these commitments by the participant, the community of all participants of a given EEP, represented by the species representatives and, when in place, the elected Species Committee, and guided by the EEP Coordinator, will act as much as possible in the interest of all individual participants, guaranteeing - whenever possible - the continued presence of the desired number and quality of animals in each of the participants' collections. Good communication is essential in this regard and the EEP Coordinator should therefore always respond to request from EEP participants in a timely fashion (and vice versa).

Participants violating any of the above rules of joint population management in the EEP should be reported to the TAG and, if problems remain unresolved, to the EEP Committee (See [chapter 3.18 EEP Complaint procedure](#))

There might be exceptional circumstances where the rules as outlined above cannot be adhered to in full. For example, in cases where the EEP is part of a larger consortium of partners and where the decision to transfer or breed animals lies with an external partner (e.g. for species that for which a government is a lead partner for a species recovery project and might hold the decision-making mandate in this regard). Any need for deviating agreements in relation to the above rules will be programme specific and not institution specific and must be included in the EEP application and submitted for approval by the EEP Committee. Such request should never be in conflict with EEP roles and goals as laid down in the EAZA Regional Species Plans or the EAZA Constitution and EAZA Code of Ethics.

In performing their tasks and duties EEP (Vice) Coordinators, Species Committee members and EEP advisors must act in the best interests of EAZA.

## 3.8 The EEP Species Committee

This chapter will provide the structure and working procedures for the EEP Species Committee. As per default EEPs will have a Species Committee. Based on the programme characteristics it is possible in the EEP application process to propose opting out of having a Species Committee or propose an alternative set up for democratic EEP decision making. When transfer and breeding recommendations are part of an EEP it is particularly important to have a Species Committee (or alternative form) to guarantee a process of democratic decision making. See [2.5.3 Decision making procedure](#).

### 3.8.1 Number of Species Committee Members

The eligible number of Species Committee members depends on the total number of participants of an EEP. The following numbers are suggested as a guideline:

- up to 10 participants: 5 to 7 members
- 11 to 20 participants: 7 to 9 members
- 21 to 40 participants: 9 to 11 members
- 41 to 80 participants: 11 to 13 members
- 81 or more participants: 13 to 15 members

Within these limits the number of Species Committee members is determined by the EEP Coordinator. It might in some cases prove difficult to get enough Species Representatives volunteering for a seat on the Species Committee. In those cases, it is acceptable to have fewer seats as suggested above, provided that a minimum of five members are on the committee.

Although the Coordinator may be their institution's representative for the species, they are not regarded as an eligible member of the Species Committee. The EEP Coordinator however does have a casting vote on the committee. A Vice EEP Coordinator is a non-voting member of the EEP Species Committee unless they are elected on the Species Committee as institutional representative.

### **3.8.2 Elections**

The members of the Species Committee are elected by the species representatives of the participants in the EEP, and from those representatives who indicated their willingness to be eligible. Thus, election forms should list all names of the latter group, be distributed to all participants' representatives. Each species representative should vote for the total number of available seats on the Species Committee, and those representatives receiving the highest number of votes are elected. The EEP Coordinator takes part in the voting only if they are the species representative of their institution. The EEP Coordinator must ensure that no less than 2/3 of seats are taken by species representatives from participants that are Full Members of EAZA.

### **3.8.3 Geographic representation**

In EEPs with a large number of participants from various parts of Europe, the EEP Coordinator may advise that there is geographic representation on the Species Committee. In that case the EEP Coordinator groups the eligible candidates on the election form according to countries or regions and advises the participants' representatives to vote for at least one candidate per region/country. For each country/region the candidate with the highest number of votes is elected; the remaining seats go to those candidates who receive the highest numbers of votes overall.

### **3.8.4 Advisors**

If certain crucial disciplines are not represented among the Species Committee's membership, the EEP Coordinator may advise the committee to appoint advisors (e.g. veterinarians, ethologists, geneticists or other experts regarding the species

and its husbandry). Such advisors may attend meetings but cannot vote. Additional procedures apply for appointing TAG and EEP Veterinary Advisors.

### 3.8.5 Veterinary Advisors

Approved TAG and EEP Veterinary Advisors (VAs) serve as part of the TAGs and EEP Species Committees by advising on issues concerning population and individual animal health, contributing to best practice guidelines and providing information and clinical advice to EAZA Members and their veterinarians as required (See [Appendix 15: Guidelines for Veterinary Advisors appointed to EAZA TAGs and EEPs](#) and the supporting guidance document 'EAZA Vet Advisor Resource Manual available on the EAZA Member Area).

All EAZA TAGs and EEPs should appoint at least one (or more) Veterinary Advisor(s). VAs can be appointed at EEP-level (i.e. advising on the specific species) and/or at TAG-level (i.e. advising on the respective taxonomic group as a whole and not advising on specific species). TAG and EEP VAs have slightly different duties and responsibilities. For more details, [Appendix 15: Guidelines for Veterinary Advisors appointed to EAZA TAGs and EEPs](#) and the supporting guidance document 'EAZA Vet Advisor Resource Manual available on the EAZA Member Area). Approved EEP Veterinary Advisors are per definition a non-voting member of the Species Committee.

The VA position is a position based on personal and professional expertise with institutional backup from an EAZA Member. This also applies for VAs not working for an EAZA Member. EEP Veterinary Advisors are nominated by the EEP Coordinator and approved by the EEP Species Committee (when in place). Veterinary Advisors working only at TAG level are appointed by the TAG Chair with approval by the TAG members. A VA application form, as well as more details on the application procedure, can be found in [Appendix 15: Guidelines for Veterinary Advisors appointed to EAZA TAGs and EEPs](#) and the supporting guidance document 'EAZA Vet Advisor Resource Manual available on the EAZA Member area).

Upon appointment, VAs must, amongst others, confirm to the relevant EEP Coordinator and/or TAG Chair:

- Their understanding of the VA commitment and duties.
- Their letter of institutional support from a Full, Temporary or Associate EAZA Member to ensure that they have access to ZIMS and other data / documentation required for the relevant species.

- Their GDPR consent to EAZA and EAZWV for storing their contact details.
- Their agreement to abide by the data confidentiality and ownership clauses.

Once an EEP Veterinary Advisor or TAG Vet Advisor's appointment is confirmed by the EEP or TAG respectively, the EEP Coordinator or TAG Chair informs the EEO TAG liaison. The liaison will then add the VA's contact details to the Veterinary Advisor directory and the EAZA Vet Advisor mailing list and inform Species360 to grant the VA access to shared medical data and records in ZIMS.

The EAZA Veterinary Committee will assist in matching suitable candidates with vacant VA positions. The EAZA Veterinary Committee also provides oversight of the Veterinary Advisors, regularly reviews and updates the VA role description and guidelines, and provides advice on cross taxonomic issues.

In order to successfully perform their duties, EEP and TAG VAs must have access to relevant medical information pertaining to the animals that are managed under the umbrella of the TAG or EEP. Without access to such data, Veterinary Advisors cannot contribute to the overall aim of healthy populations of individuals with positive animal welfare within the EAZA community.

It is envisaged that VAs will increasingly have access to medical information pertaining to the species connected to their roles via ZIMS. However, there are other ways to gather information, ranging from questionnaire data to individual inquiries by email, post or telephone. Irrespective of the method of data collection, the next few paragraphs outline the EAZA rules and procedures about the ownership and use of data obtained by TAG and EEP Veterinary Advisors. The TAG Chair or the EEP Coordinator has a responsibility to ensure that the VA has access to all the relevant information.

#### *Confidentiality*

- Medical data is shared with the EEP or TAG Veterinary Advisors in their role under EAZA rather than as individuals.
- When using medical data, institutions may not be singled out and data pertaining to individual animals or institutions cannot be used for other purposes, nor shared or published without prior consent.

#### *Ownership*

- Ownership of (medical) data stays with data provider.

- Publications using the data provided must first be approved by the EEP/TAG, and when external parties are involved non-disclosure agreements may be required.
- Papers using anonymized aggregated medical data arising from  $\geq 10$  institutions, do not also require consent from the institutions providing the data.
- Publishing individual case data, novel techniques, datasets originating from  $< 10$  institutions, or anonymized aggregated data that could be easily traceable to an individual animal or institution must be preceded by a formal request to the data providers.

### **3.8.6 Terms of membership and re-election**

The terms of membership of the Species Committee is five years. Five years after the previous election a re-election is held for the entire committee and all participants should again be asked if their representatives are eligible. There is no limit to the number of 5-year terms that one can serve on the Species Committee. The EEP Coordinator is encouraged to highlight the balance between experience and rejuvenation when inviting candidates to stand for election.

A committee member giving up their membership (e.g. by leaving the institution which they represent) in between of two elections is replaced by the candidate who obtained the highest number of votes of the representatives after those that were elected during the previous election. If there is still an acceptable number of members (see above), the committee may decide not to replace a leaving member until the next five years' election.

### **3.8.7 Conflicts of interest**

It is important for EEP Species Committees to make science-based, objective and democratic decisions, and to be aware of and avoid conflicts of interest with regards to their operations. A conflict of interest arises when the primary duty of an EEP Coordinator, EEP Species Committee member or EEP advisor to act in line with the best interests of EAZA and the EEP as part of the EAZA organisation and to act in line with the objectives, standards and guidelines of EAZA, is or may reasonably be perceived to be compromised by other interests. Such other interests may include, but are not limited to personal, financial, and other commercial and professional interests, any of which could potentially affect

objective decision-making, integrity and trust in the EEPs operations and the fulfilment of the EEP responsibilities, as part of the EAZA organisation.

To avoid potential conflicts of interest, EEP Coordinators, EEP Species Committee members or EEP advisors cannot perform, or be associated or engaged with organisations performing, activities (e.g. through employment, paid consultancy or otherwise) that are connected to brokering or dealing animals. Nor can they be involved in the selling of services, products or goods to zoos and/or aquariums.

In the process of appointing EEP Coordinators, EEP Species Committee members or EEP advisors, the EEP Committee or the EEP, as appropriate, will enquire about potential conflicts of interest as outlined in the previous paragraph. Candidates that are found to have such a conflict of interest cannot be appointed into the respective position by the EEP Committee (EEP Coordinator or EEP Vice Coordinator) or EEP (Species Committee members and EEP advisors). When such potential conflicts arise after the EEP Coordinator, EEP Species Committee member or EEP advisor has been appointed into their position, the respective EEP Coordinator, EEP Species Committee member or EEP advisor that is conflicted, must immediately report these to the Chair of EEP Committee (in case of EEP Coordinator or EEP Vice coordinator being conflicted) or EEP Coordinator (in case of the Species Committee member or EEP advisor being conflicted). The Chair of the EEP Committee or EEP Coordinator shall determine whether there is a conflict of interest, and if so, will request the person to either cease the activities causing the conflict with immediate effect or stepdown from the position of EEP Coordinator, EEP Species Committee member or EEP advisor with immediate effect.

Moreover, in the day-to-day running of the EEP, EEP Coordinators, EEP Species Committee members or EEP advisors may, from time to time, have a conflict of interest with certain decisions that will be taken by the EEP. If that is the case, such EEP Vice Coordinator, EEP Species Committee member or EEP advisor should immediately report any such (potential) conflict of interest to the EEP Coordinator. To this effect EEP Coordinators are encouraged to ask participants to express any potential conflict of interest they might have at the start of a meeting or online decision-making process.

The EEP Coordinator shall determine whether there is a conflict of interest. EEP Vice coordinators, EEP Species Committee members or EEP advisors shall not participate in the discussions and decision making on a subject in relation to which they have a conflict of interest.

In case the EEP Coordinator has a (potential) conflict they should turn to the EEP Vice coordinator, who should assume the role normally assigned to the EEP Coordinator as per the above. In case both the EEP Coordinator and EEP Vice coordinator Chair have a (potential) conflict of interest, or in case they cannot objectively assess whether EEP Species Committee members or EEP advisors have a conflict of interest, or in case the EEP does not have a Vice coordinator they should ask the relevant TAG Chair to assume the role normally assigned to the EEP Coordinator.

Where all Species Committee members that are eligible to vote have a conflict of interest, the relevant decision(s) shall nevertheless be taken by the Species Committee.

### **3.8.8 Meetings, agendas and minutes**

Species Committees should meet three times during the five-year election period, unless the development of the programme requires more frequent meetings (which may occur in the beginning phase), or unless the programme clearly warrants less frequent meetings (which may occur in well-established programmes with less complicated population structures).

The EEP Coordinator organises and chairs Species Committee meetings, which may be held in conjunction with the EAZA Annual Conference, TAG meetings or other meetings which Species Committee members are likely to attend. This is in order to make the most efficient use of people's time and travel expenses. Besides face to face meetings the EEP Coordinator is encouraged to initiate email discussions and organise online meetings whenever relevant.

The agenda of each meeting is prepared by the EEP Coordinator and sent to the committee members, TAG Chair and EAZA Executive Office in advance. The minutes of each meeting are sent to all Species Committee members of the EEP, the TAG Chair and the EAZA Executive Office within two months after the meeting.

As per default there would be one Long-Term Management Plan meeting organised during the five-year election period that might be held in conjunction with, or replace the regular, Species Committee meeting. For more information about this process please refer to [section 3.9 Long-Term Management Plan \(LTMP\)](#).

Members of the Species Committee should be able to attend at least two meetings during the elected period of the committee.

### 3.8.9. Voting and conflicts

Decisions of the Species Committee are taken on the basis of a simple majority of votes of the members. Only in the case of equally divided votes, does the EEP Coordinator have a vote, which is then a casting one. A EEP Vice coordinator is a non-voting member of the EEP Species Committee unless they are elected on the Species Committee as institutional representative. Equally divided votes in this context either means the exact same number of votes (e.g. seven “yes” and seven “no” votes) or a one vote difference (e.g. seven “yes” and eight “no” votes).

### 3.8.10 Subjects to be dealt with by the Species Committee

The Species Committee should deal with all strategic aspects of the EEP, and should particularly discuss (and where appropriate approve):

- a. The annual breeding and transfer recommendations.
- b. The Long-Term Management Plan.
- c. The EAZA Best Practice Guidelines (including animal welfare).
- d. Research proposals for the improvement of husbandry, reproduction, etc.
- e. Possible conflicts between participants and EEP Coordinator regarding the implementation of recommendations.
- f. Proposed new (non-EAZA) participants for approval.
- g. Conservation activities.
- h. Appointment of advisors.

Alongside the EEP Coordinator, the Species Committee has the responsibility for ensuring the successful management of the programme. In case the EEP Coordinator is not functioning as expected (members of) the Species Committee should express their concern to the Coordinator and, if that fails, the relevant TAG Chair. It is recognised that the way the species committee functions might be slightly different from one EEP to another. When relevant Species Committee members must be prepared to take a proactive role in the preparation and implementation of the subjects mentioned above. After the election of a new Species Committee or appointment of a new EEP Coordinator the working

relations should be tabled for discussion in order to re-establish current working procedures or when relevant adapt these accordingly.

Species Committees for species that are taxonomically close and facing similar population management issues (e.g. related to husbandry) are encouraged to work together whenever relevant.

It is important to stress that although EEPs form part of the EAZA organisation, **EEP (Vice) Coordinators and EEP Species Committees have no authority to represent EAZA or bind EAZA in any formal manner** and as such have no power to negotiate, execute or sign any agreements, commitments, or documents on behalf of EAZA make representations as to EAZA's position, incur financial obligations or commitments on behalf of EAZA, or hold themselves out as having power of attorney or other delegated authority to act on behalf of EAZA. The authority to represent EAZA and execute binding commitments on its behalf is exclusively governed by EAZA's articles of association and other constitutional documents. This means that only individuals or bodies expressly authorised (such as the EAZA Director, EAZA Chair or members of the EAZA Executive Committee) may validly represent EAZA and/or enter into binding commitments on its behalf.

In instances where such official agreements, commitments or documents are considered necessary or beneficial for the work of the EEP, the EEP Coordinator must engage the TAG Chair, the EEP Committee and EAZA Executive Office at the earliest practicable opportunity to obtain guidance on the appropriate procedures and approvals required, and to ensure that any such arrangements are properly authorised and executed by individuals with the requisite authority under EAZA's constitutional documents.

### 3.8.11 Exceptions and alternatives

For some programmes there can be legitimate reasons why the default structure and format for Species Committees does not work either permanently or temporarily. In those cases, the EEP Committee can decide to approve another approach for that particular programme such as:

- a. A joint Species Committee for species with similar issues and/or that compete for spaces.
- b. A smaller Species Committee (minimally the Coordinator, Studbook Keeper and TAG Chair and Vice chair).

- c. Include all participants automatically in the Species Committee (even in big populations)
- d. Work with a more flexible working group concept (appoint a working group for a certain issue and appoint another working group for another topic, overseen by the Coordinator).
- e. Electing a new committee before the five-year term is completed.
- f. Species Committee role (in part) lays with an external partner (e.g. a government who might have ownership over animals).

Based on the outcomes of the RSP process the relevant TAG can ask the EEP Committee to approve such an alternative approach. This would normally be part of the EEP application process but may also be proposed in the interim between two RSP sessions if so required. This will only be approved where there is clear reasoning and agreement of the participants in the programme or programmes.

The functioning of the EEP will be evaluated every five years and will include a session on the Species Committee (or alternative).

### **3.9 Long-Term Management Plan (LTMP)**

A Long Term Management Plan (LTMP) should be developed for each EEP. In its simplest form a LTMP should describe the management strategies in support of the roles for *ex situ* management as defined in the Regional Species Plan (RSP) for the EEP. In absence of an RSP, the roles will have to be defined during the LTMP process.

Per default a LTMP is published once every five years, however this may vary depending on the roles and goals of the EEP and the (reproductive) biology of the species concerned. The LTMP will typically include the demographic and genetic population management strategy for the EEP population but will additionally include strategies for research, husbandry developments, education and conservation activities, etc. as relevant and applicable to that EEP.

The LTMP process is facilitated by the PMC team of the EAZA Executive Office and run in close cooperation with the EEP coordinator. There are different types and styles of LTMPs varying from a two-page strategy towards keeping a population demographically stable and developing education and awareness for

a given species, to a holistic analysis including a tailored made, detailed, strategy for the demographic and genetic parameters of the population; (non)breeding and transfer recommendations for the next cycle (year or otherwise); and other actions required to deliver all of the EEP's assigned roles, such as activities related to husbandry, research, welfare, education, *in situ* conservation support, etc. The content and set up of the LTMP will be discussed between the EEP Coordinator and the PMC team in advance. While for the development of some LTMPs a 1-2 day LTMP workshop together with the Species Committee and any other relevant stakeholders might be required, for others an online meeting with a small group of stakeholders (e.g. EEP Coordinator or TAG chair) might be sufficient.

The LTMP document is drafted by the PMC team for approval by the coordinator and when in place the EEP Species Committee. The PMC team aims to produce the LTMP within one month after the LTMP meeting, with approval to follow within one month after sharing the draft LTMP with the EEP coordinator and EEP Species Committee (and other stakeholders if so applicable).

A LTMP may or may not include (non)breeding and transfer recommendations for the next cycle of breeding and transfers. In the period between LTMP publications the EEP coordinator and their Species Committee are responsible for the implementation of the LTMP and developing and/or updating the annual breeding and transfer recommendations and, if required, (aspects of) the management strategy.

While the LTMP report is a static documentation of the plan at one point in time, the actual plan should be a "living" process. Annual evaluations by the EEP Coordinator and EEP Species Committee are necessary to assess if actual developments in the population are in accordance with the targets. If, after a given period of time, actual developments in the population deviate too much from the target, or if external factors (e.g. changed conservation status of the species in the wild) would require redefinition of targets, the plan should be reviewed. Any fundamental changes to core strategies in the plan should be made together with the species committee (if there is one) and the TAG. The EEO PMC can be contacted for advice.

The EEO PMC prepares a yearly schedule for LTMP sessions. This will be largely driven by the RSP schedule since the RSPs set, confirm or change roles for EEPs. However, the PMC may also prioritise EEPs in case of urgent need and EEP coordinators can contact the PMC to indicate needs. It should be noted that the number of LTMPs that can be published annually is subject to capacity in the EAZA PMC.

## 3.10 The EEP annual report

### 3.10.1 EEP pages

EAZA believes it is important to demonstrate and promote the work of EAZA Ex Situ programmes and to showcase the variety in EEPs, their aims and set up. EAZA therefore will set up a so called 'EEP page' for all programmes, which will be populated by the EAZA Executive Office in close cooperation with the EEP Coordinator. The EEP pages have both an externally facing part on the EAZA public website to share EEP information in a transparent manner, and an internally facing part on the Member Area which includes specific information linked to the management of the EEP that is relevant to the EEP Participants and EAZA Membership.

The public pages include name of the EEP, name of coordinator, hosting institution, roles in a table format, link to the BPG, logo of the IUCN status with a link to the relevant page, logos and names of programme partners with links to the website (where applicable), highlights which include news stories (Zooquaria, JZAR), species events, *in situ* news, research and other information fit for the public. The EAZA member area includes links to the RSP, EEP application and LTMP, decision statement, management strategy, progress made towards goals/objectives in the LTMP, species committee/programme governance, highlights (information that only relates to EAZA members) and calls for action. Calls for action can include requests for holders, research priorities, veterinary and conservation updates. The EEO works closely together with the Coordinator to create and keep the EEP pages up to date.

The EEO recognises that there is a transition period before each EEP has its own EEP page and therefore should Coordinators wish to continue to send in annual reports they can use the template in [Appendix 20: EAZA Template Programme Annual Report](#)

## 3.11 The studbook

This chapter describes the procedures regarding the studbook including on the population management software, data management, data use, data access and data ownership. The section is tailored to studbook datasets that are maintained for the purpose of managing EEPs. The studbook dataset is managed by the EEP coordinator (or someone delegated to do so on their behalf). This person is

referred to in the chapter as the 'Studbook keeper'. The Studbook keeper must always represent an EAZA Member institution.

In addition to the EEP studbook datasets, that are run on a permanent basis to support the management of the programme, there are situations where the EAZA Executive Office might support TAGs by setting up an unofficial temporary studbook dataset for analytical purposes only, for example in preparation for an RSP workshop to support informed decision making. These datasets serve a specific and short term analytical purpose and have a defined beginning and ending. Whilst conceptually the same principles apply to such temporary datasets, much of the sections described in this chapter will not be applicable to these temporary studbook datasets. The EAZA Executive Office, working in close cooperation with the TAGs, will keep an oversight over these temporary datasets.

Permanent studbooks should only be maintained to support management of EEPs. It is however recognised that there might be occasions where there is value to maintain an analytical studbook dataset on a more permanent basis to support the decisions made for taxa that have a Mon-T RSP category. In such cases TAGs can propose for a Mon-T studbook dataset to be maintained to the EEP Committee. In this regard it is relevant to keep in mind that the dataset should not be used for 'day-to-day' management of the population. The EAZA Executive Office will maintain an overview of Mon-T for which such an exception has been approved. Where applicable the same procedures apply to these Mon-T studbook datasets as those for EEPs.

### **3.11.1 ZIMS for Studbooks**

A digital studbook dataset is essential to allow the various analyses that are needed to inform population management (see also [chapter 3.12 Studbook analyses](#)). EEP studbook data has to be maintained in ZIMS for Studbooks, which is supported by Species360. EAZA does not support the use of any other software for maintaining pedigree-based studbook data. EAZA does recognise that the natural history characteristics of certain taxa are not (yet) compatible with the use of ZIMS for studbooks (e.g. group managed species). For populations managed at group level - a significant number of challenges remain regarding tools for the registration and analysis of pedigree and demographic data. Information on currently available methods and tools, as well as future challenges, can be found in [section 3.12.3 Group management](#).

### **3.11.2 Data to be included in the studbook**

Please be sure to check the EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024).

An EEP studbook dataset should aim to include as a minimum:

- a. All individuals ever held in EAZA Member institutions, including those that have not been entered in ZIMS by institutions, and which will thus not appear in the Suggested list of ZIMS for Studbooks.
- b. Known holdings outside the EAZA Membership, if relevant to the population and feasible. (For non-EAZA institutions that are ZIMS users, please see the Global filter in the Suggested list).
- c. All direct ancestors of these specimens (regardless of location), tracing lineage to original wild-caught founders.
- d. All stillbirths, premature births and early deaths should be registered as individuals to enable analysis into the effects of inbreeding, husbandry problems and hybridisation to be carried out.

It is noted that for some taxa, particularly those with long *ex situ* histories, it may not be able to obtain records for all appropriate specimens; this should, however, remain the clear eventual aim of all EEPs.

The information maintained for each individual should include as a minimum:

- a. Identities of sire and dam;
- b. Date and location of birth;
- c. Full transaction history (names of owners and dates of ownership changes); where the holding institution is not the owner of the specimen, the studbook should record both the actual location of the animal and the owner institution;
- d. Where animals have been obtained from or released into the wild, the studbook should record, if possible, details of the capture or release location;
- e. Any individual identifiers (e.g. house names, local identification numbers, tags, transponders, tattoos);
- f. Any data on the reproductive potential of living animals (e.g. temporary contraception method and dates, permanent contraception such as castration);

- g. Date and location of death;
- h. Cause(s) of death and information on disposal of body. EEP Coordinators and their Vet Advisors are encouraged to collect data on causes of death to enable studies of the effects of inbreeding and hybridisation and to identify potential husbandry problems.
- i. Other information pertinent to a particular programme (e.g. sub-species, genetic analysis).

If any assumptions are made, to be used for demographic or genetic analysis, these should only be recorded in an Analytical Overlay. The reasons for each of these assumptions should be clearly documented in the notes. Any assumptions made to determine a used birth and death date should also be clearly documented in the individual's notes.

Additional detailed notes on any of the above should be made, as needed. Studbooks for egg-laying species should include, if possible, data on clutch size, fertility and hatchability. All information should be included within the studbook dataset itself, not as separate paper records.

### **3.11.3 Studbook data validation**

It is the responsibility of the EEP Coordinator not only to maintain data into a correct studbook format, but also to assess the quality of the data by investigating missing information, inconsistencies among reporting institutions, logical errors and other potential sources of error in the data. Several tools exist within ZIMS for Studbooks to assist with data validation, including Data Quality tools and comparison with institutional data as recorded in the ZIMS Husbandry module. Data validation should be performed, and potential errors investigated, before using data for analyses or prior to publication of the studbook

### **3.11.4 International and regional studbooks**

As part of the RSP process as described in Chapter 2, EAZA wants to set priorities for our population management programmes considering the global context and to develop integrated plans according to the One Plan Approach where needed. For that reason, EAZA believes that a level of transparency and sharing of EAZA studbook data with other professional zoos and aquarium associations is relevant. At the same time having a level of access to studbook data from other regions is necessary. By sharing our regional studbook data and having

access to studbook data from other regions, we facilitate the analysis of combined data sets that will empower better species conservation and animal care outcomes.

#### *3.11.4.1 Data collection*

In cases where there is a WAZA International Studbook (ISB) in place for an EEP species, ideally data is recorded into one studbook dataset to avoid duplication of efforts. Both the international studbook keeper and the EEP Coordinator should in this case have editing access to the studbook. Between the ISB keeper and EEP coordinator clear rules should be established around data entry and communication with the holders. Unless otherwise agreed, the EEP coordinator should take responsibility for data from, and correspondence with, EEP participants, regardless of the ISB hosting region.

Sometimes it will not be possible to come to an agreement with an ISB keeper, or it might make sense to maintain a separate International studbook and EAZA studbook, such as when opinions on historical pedigree differ. In this case, it is recommended that the EEP Coordinator and International Studbook keeper provide each other analytical access to the EAZA studbook and ISB studbook, following the EAZA/ZIMS for Studbooks Access roles guidelines [See [Appendix 29: Access Roles in ZIMS for Studbooks](#)]

#### *3.11.4.2 Studbook IDs*

In case separate International and EAZA studbooks are maintained, it is recommended that the studbook keepers try to come to an agreement regarding assignment of studbook numbers. For example, it is recommended to try to agree with the ISB keeper that specific sets of ISB IDs are reserved for EEP. These studbooks IDs can then be assigned to animals registered in the EEP studbook. If all individuals receive only one, international, studbook number their number does not change if they happen to be transferred through different regions (and their respective regional studbooks) and this will prevent confusion in communication between different regions. In cases that international and regional studbook IDs cannot be attuned, it is essential that IDs other than the EEP IDs are also recorded in the EEP studbook.

In case a WAZA ISB is in place for an EEP species, the EEP Coordinator is encouraged to also consider the WAZA policies around ownership, use and access to ISB data which is available on the WAZA website. This is of particular

importance when a single dataset is used for the purpose of both the ISB and the EEP.

### 3.11.5 Publication of studbooks

Publication of the studbook is no longer a mandatory requirement as holders can request access to ZIMS for Studbooks information and as such can have real time access to the studbook data and run analysis on the data via export to PMx (See [3.11.7 Sharing studbook data within and outside EAZA](#) for more information). Furthermore, detailed analyses are also included in the EEP Long-Term Management Plan (LTMP). It is recognised that some EEP Coordinators may still wish to publish an electronic version of the studbook which can be done using [Appendix 14: EAZA studbook template](#).

### 3.11.6 Ownership of studbook data

Studbook data are routinely collected from zoos and aquariums for the purpose of supporting the coordinated management of *ex situ* populations of wildlife species.

Where the primary objective is to facilitate the coordinated management of *ex situ* populations, an EEP studbook is established under the auspices of EAZA as the regional zoo and aquarium association that administers these species management programmes. EAZA authorises EEP Coordinators to collect and maintain data on behalf of the association and requires its Member institutions to contribute data to the studbook. In such cases, institutions contribute data on the understanding that the data are to be used for the collective benefit.

EAZA considers that the purpose for which a studbook is established and the basis on which data are provided to the studbook are of relevance to the ownership of the studbook data and the subsequent availability of the studbook dataset in all its formats. Therefore, EAZA considers:

- a. That all studbooks managed under the auspices of, and on behalf of, EAZA are developed for the collective benefit;
- b. That the data in such studbooks are held under the ownership of EAZA;
- c. That, for such studbooks, the Studbook keeper is the curator of the data and neither the Studbook keeper nor the institution at which that person is employed holds ownership over the data in the dataset;
- d. That, a process for access to studbooks data needs to be in place for EEP participants, further relevant EAZA stakeholders and external stakeholders that balances the importance of data transparency with the

professional expertise needed to be able to use such data (See section below)

As part of the One Plan Approach, some EEPs might work in a broader framework with external partners (governments, sanctuaries, NGOs, etc) who might bring in additional or different requirements with regards to ownership of studbook data. As the process above is based on key principles in EAZA, any deviating procedure with regards to ownership of studbook data must be approved by the EEP Committee.

### **3.11.7 Sharing studbook data within and outside EAZA**

In addition to the day-to-day use by the Studbook keeper, data in the studbook is or can be of relevance to other stakeholders as well. This includes internal EAZA stakeholders (for example TAG chairs, vet advisors, EEP Species Committee members and so on), zoos and aquarium organisations in other regions (for example WAZA ISB keepers, regional programme coordinators like SSP or ASMP Coordinators and TAG chairs from other regions) and other external stakeholders (for example researchers, students, teachers, NGOs, governments and so on).

EAZA believes that transparency is key to the success of any coordinated breeding or population management effort and, secondly, that correct use and interpretation of studbook data in population management software (e.g. ZIMS and PMx) requires professional expertise and is best done by, or under supervision of, specialists. Sharing information can be mutually beneficial for all parties and can lead to more effective *ex situ* population management and species conservation. However, data sharing is not always mutually beneficial and can lead to concern, reluctance and risks (e.g. misuse, misinterpretation, sharing of information beyond intended audiences and modification of studbook data). Therefore, sharing studbook data should only happen after careful consideration. The process described in this paragraph is important for the Studbook keeper, as the curator of the data.

The decision to share access to studbook data should be subject to a number of considerations:

- Be aware that the studbook data has been contributed by institutions, in the understanding that the data are to be used for the collective benefit and that this is done on a basis of trust.
- Be aware that the studbook data may contain sensitive information or information that may be considered controversial (e.g. death causes, specific notes on individuals).

### Possible methods of sharing studbook data

Studbook keepers and the EAZA Executive Office can share studbook data in several ways. Data can be shared by providing an extract of the studbook information, such as a Census Report or exported list of individuals. The studbook publication (see section [3.11.5 Publication of studbooks](#)) is shared with many of the relevant audiences as well. Furthermore, an Export to PMx can be provided, containing detailed information of the studbook. Finally, the Studbook keeper can choose to share the studbook information in its entirety, by allowing someone access to their real-time studbook dataset.

Sharing studbook data by allowing access to a studbook in ZIMS for Studbooks is efficient, as it is a real-time studbook database that allows for the access of multiple people to a single studbook at the same time. Therefore, one will always have access to the most up to date version of the studbook available. Studbook keepers can assign others with viewing or analytical access to their studbook data in ZIMS for Studbooks. However, this option is also the riskiest and needs the most careful consideration:

### Access to studbook data within EAZA

Sharing studbook data with stakeholders within EAZA can be important for the successful running of the programme and management of the species and population. EEPs are run under the auspices of EAZA and on behalf of the membership and therefore sharing studbook data within the EAZA community is considered important. This is mainly achieved through sharing of studbook publications and presentations at meetings. In some cases, it might also be relevant or desirable for EAZA stakeholders to have access to the studbook data in ZIMS. The following procedures are laid down for such situations:

- The Studbook keeper is the only person that can by default edit and add EAZA studbook data. This 'Edit role' can only be granted by the EAZA Executive Office. In deviation from the default the EEO may, at the request of the Studbook keeper, give one additional programme assistant and one temporary position (e.g. a student doing work on a programme) editing rights.
- Besides the Studbook keeper, the relevant EAZA TAG chair, vice chair and EAZA Executive Office staff (e.g. TAG Liaisons and population biologists) can, by default, view EAZA studbook datasets and export them for analyses in PMx. They will not be able to edit the studbook data.
- If so desired, EAZA Members (in particular, programme advisors, species committee members, and institutional participants) can also request to view EAZA studbook datasets and use it for analyses in PMx. This will not be a default possibility and will require access that is enabled by the

Studbook keeper or staff at the EAZA Executive Office. They will not be able to edit the studbook data.

- EAZA Studbook keepers of a similar species may also wish to perform comparative research and view EAZA studbook datasets and use it for analyses in PMx. This will require access that it is enabled by the Studbook keeper or staff at the EAZA Executive Office. They will not be able to edit the studbook data.

See [Appendix 29: Access Roles in ZIMS for Studbooks](#) for more details about the different types of access roles.

Having access to studbook data comes with a responsibility to ensure data is used for appropriate purposes only. **The Studbook keeper and EAZA Executive Office may decide to share data with other parties**, internal or external to the EAZA community. The rules and procedures for doing so are described in the next sections. It is important to stress that **anyone else - granted 'Read Only' access, 'Analytical' access or otherwise- may only use the data for their own purposes and must never share it** with any other persons.

#### Sharing studbook data within the global zoos and aquarium community

- On a case by case basis, it can be decided to allow partner regional associations access to view and export EAZA studbook datasets, particularly population biologists and Studbook keepers for the same species in those regions. This will require access that it is enabled by the Studbook keeper or staff at the EAZA Executive Office. They will not be able to edit the studbook data. See also section [3.11.4 International and regional studbooks](#)

#### Sharing data with external parties

EAZA encourages the use of studbook data for professional research purposes and peer-reviewed publication. Sharing studbook data with parties outside the EAZA (and WAZA) community needs more careful consideration. There are several conceivable situations in which Studbook keepers would like to share their studbook data with people from outside the EAZA (and WAZA) community.

The following applies in these situations:

- It is important to verify who the third party is, and for what purpose they want get access to the studbook data. The Studbook keeper should only share studbook data with third parties for research (or other) purposes that are specific to the species under the umbrella of the programme. Third parties that would like to gain access to data from multiple

studbooks for cross-taxa or general, non-species specific, purposes must contact the EAZA Executive Office.

- The Studbook keeper or EAZA Executive Office should ask for a project proposal to be submitted by the third party requesting access. This request should be approved by the EEP Species Committee (EEP-species-specific) or EEP Committee (broader types of research), respectively. If approved, a signed non-disclosure agreement (NDA) with the third party about the use of the data must be signed, prior to providing a third party access to studbook data. This is irrespective of the type of access (e.g. printed studbook, Excel file, PMx export file, access to the dataset in ZIMS, etc.). A template non-disclosure agreement is available in [Appendix 30: Template Non-Disclosure Agreement EAZA Studbook Data](#).

## 3.12 Studbook analyses

### 3.12.1 EEP roles, goals and recommendations

EEP Coordinators are expected to assist their TAG with determining the precise roles of their population and the main goals of the population required to be able to fulfil these roles (see [section 2.2 Regional Species Planning](#)). Further detail on the demographic and genetic targets for the population and further actions required to meet the roles and goals of the population are determined as part of the development of the Long-Term Management Plan (see [section 3.9 Long-Term Management Plan \(LTMP\)](#)). Analyses of the studbook dataset is important both for the development of the RSP as well as to set the genetic and demographic targets for the LTMP.

Another major task of the EEP Coordinator and EEP Species Committee is the implementation of the LTMP and the appropriate management of the species' population according to ongoing developments in the population. This will often include management aimed at the population's long-term survival and viability. A complete demographic and genetic analysis is necessary at regular intervals as a basis for the formulation of population management recommendations. These analyses are best evaluated and provided annually, or with short-living, highly reproductive species, even more frequently.

### 3.12.2 PMx

[PMx](https://scti.tools/pmx/) (available at <https://scti.tools/pmx/>) and various other software packages are freely available online to carry out detailed demographic and genetic

analyses of the EEP population (the managed population). These analyses will help to determine the current status of a population, to evaluate effects of previous management measures, to determine future management approaches and to identify and design research that may be required to improve current conditions. All analyses should be interpreted with caution and with common sense. Genetic analysis may not be reliable with less than 85% known pedigree and with incorrectly recorded parentage. Demographic analysis may be confounded by a series of factors, including small sample size, erroneous data and unrepresentative data. Whenever necessary, these analyses should be performed in consultation with someone of acknowledged expertise in population biology, such as the EAZA PMC or a member of EPMAG (EAZA Population Management Advisory Group).

In order to receive training in genetic and demographic analysis of studbooks, new EEP Coordinators are required to attend EAZA's Introduction to EAZA Ex situ Programme Course and are encouraged to attend further courses (Breeding and Transfer Recommendation Training as given by the EAZA PMC). Written guidance and instruction can be found in the documents referred to in [Chapter 5 Training/Further information](#).

### **3.12.3 Group management**

For group managed populations a significant number of challenges remain regarding tools for the registering as well as analysing genetic and demographic data. The approach to record data, analyse and manage these populations highly differ per species. Therefore, Coordinators that use group management for the management of their EEP are encouraged to contact the EAZA PMC to determine the best way to record data and to develop a tailor-made analysis and management strategy for their population.

## **3.13 Annual breeding and transfer recommendations**

### **3.13.1 EEP recommendations**

Although most EEPs are expected to include EEP recommendations for individual animals, or groups of animals, not all of them will. When they are, these recommendations usually include breeding, non-breeding and transfer recommendations.

On an annual basis the EEP Coordinator (and the Species Committee) should determine which breeding, non-breeding, transfer and potential other

recommendations need to be made per individual (or group for group living species) in the population. These recommendations should be based on:

- a. The goals set out for the population in the Long-Term Management Plan (LTMP) (see [section 3.9 Long-Term Management Plan \(LTMP\)](#));
- b. Demographic and Genetic analyses of the most recent population data (See [section 3.11 The studbook](#)).

The annual (non-)breeding and transfer recommendations and Long-Term Management Plans are scientifically based and by default democratically approved by the Species Committee which is elected by and from the EAZA Member participants' representatives for a given EEP species. After Species Committee approval their implementation must be attempted to be completed in the following year (unless otherwise indicated in the recommendations). [Note that it may be necessary to work on a shorter than annual basis in short-lived, rapidly reproducing species.]

A detailed description and explanation of this process for individually managed species with pedigrees can be found in: Ballou, J.D., Lees, C., Faust, L.J., Long, S., Lynch, C. Bingaman Lackey, L. & Foose, T.J. 2010. Demographic and Genetic Management of Captive Populations. In: Kleiman, D.G., Thompson, K.V. & Bear, C.K. (Eds.) *Wild Mammals in Captivity – Principles and Techniques for Zoo Management*, Second Edition. The University of Chicago Press: Chicago and London. Pp 219-252.

EEP Coordinators receive the necessary training to complete this task for individually managed species with pedigrees during the 'Introduction to EAZA Ex situ Programme Management Course'. Further assistance can be obtained from the EAZA PMC team and/or EPMAG (EAZA Population Management Advisory Group). Further information and literature can be found in [section 1.1.1 Management of small populations](#) and [section 3.11 The studbook](#).

The population analysis software package PMx provides the necessary results from pedigree analysis. In practice, the EEP Coordinator will need to find the best possible compromise between genetic and other biological (e.g. age, breeding experience, health, social group composition, reproductive strategies, etc.) and practical aspects (e.g. various transport restrictions, transport costs, exhibit needs, etc.).

The number of breeding recommendations should be governed by the targeted growth rate for the population, which in itself follows from the long-term

demographic and genetic goals set for the population in the Long-Term Management Plan and the RSP (see [section 2.2 Regional Species Planning](#))

A recommendation should be given for every individual (or group for group living species) in the population, even if this recommendation is not to change the current situation. In this way institutions receive confirmation that what they are currently doing is still what is required, it gives all institutions the continuing feeling of being involved in the programme (even if they have been keeping a non-breeding situation for a number of years) and the risk of institutions taking unilateral action due to lack of communications from the Coordinator is minimised.

Apart from breeding recommendations, other potential recommendations that may need to be made include (but are not limited to): separation or contraception of animals to prevent breeding, regrouping individuals for companionship/welfare reasons, instructions for monitoring of reproduction, behaviour, health etc., instructions to keep things as they are, rearing instructions, etc.

For optimal transparency it is recommended to send all recommendations to all participating institutions – while ensuring that individual institutions can easily and quickly find their particular recommendations.

For group living species a significant number of challenges remain regarding tools for the registration of pedigree and demographic data, tools for genetic and demographic analysis, and methods for optimal management. Information on currently available methods and tools, as well as future challenges, can be found in [section 3.12 Studbook analyses](#).

### **3.13.2. Non-breeding recommendations (EEPs)**

As non-breeding recommendations are often subject to debate some specific background on these recommendations is provided in this section.

The following procedures apply to non-breeding recommendations:

- a. As part of the overall management strategy of an EEP, an EEP coordinator can issue a non-breeding recommendation for a certain individual or group of animals. This recommendation should be based on the needs of the population defined by scientific analyses (e.g. PMx) and the possibilities to hold or transfer offspring as defined by the holders. These recommendations should not be made too easily and must always be considered with care because the absence of breeding can affect the group dynamics in social species and not allowing females to reproduce

(before a certain age) is known to lead to pathologies of the reproductive tract in several mammal species. Depending on the species and the method used to prevent breeding it might be difficult to bring animals back into a breeding situation if required at a later stage.

As with all EEP recommendations, the institution to which the recommendation is applicable has the possibility to enter into dialogue with the EEP Coordinator to discuss a possible alternative recommendation. However, when the EEP non-breeding recommendation is made it must be respected. Not following EEP recommendations, including non-breeding recommendations, is a serious violation of EAZA procedures (see [sections 3.13 Annual breeding and transfer recommendations](#), [3.14 Conditions of animal transfers and the role of the EEP Coordinator](#) and [3.18 EEP Complaint procedure](#)).

- b. There are different options for how to respect a non-breeding recommendation issued by an EEP:
  - Do not breed that programme species or individual (contraception, single sex groups, split pairs, etc.);
  - Breed and cull, whereby it is the responsibility of the institution involved to ensure this is also executed (after checking with the EEP Coordinator, as the situation within the EEP population might have changed by the time of culling the individual).
- c. Requests from institutions to change a non-breeding recommendation based on offering additional holding space at the institution need to be considered by the EEP. Nevertheless, a non-breeding recommendation might continue to be applicable for the genetic management of the population. To avoid over-representation and inbreeding, new space might need to be prioritised for other individuals in the population.
- d. If an animal is 'accidentally' born despite a non-breeding recommendation (e.g. when contraception fails, when a female was impregnated prior to the recommendation, if individuals became sexually mature at exceptional young age or in cases of parthenogenesis) the EEP participants should find a solution in close cooperation with the EEP. The EEP should try, but cannot be expected, to find a location for placing the individual(s) and management euthanasia/culling or sending the animal outside of the EEP population might be the only solution. Although such 'accidents' cannot be completely avoided it must be clear that EEP participants have a responsibility to do their utmost to prevent them.

There might be a demand for an EEP species outside of the EAZA membership, for example in zoos or aquariums in another region. If so, the decision whether to cooperate and which individuals to select must go via the EEP. It is the responsibility of the coordinator and their species committee to integrate this in the EEP Long-Term Management Plan. EAZA and the EEP have a responsibility to ensure such transfers are not against the Regional Species Planning aims of other regions. When this is not the case, wherever possible individuals should be selected that will contribute to setting up a healthy population. With this in mind, it is not acceptable to ignore a non-breeding recommendation with the aim to outplace animals to other regions, as such recommendations must go through the EEP. Also refer to [section 3.6.5 Procedure for sending EEP animals outside of programme](#).

## 3.14 Conditions of animal transfers and the role of the EEP Coordinator

### 3.14.1 Conditions of transfers

For the long-term viability EEP populations, all transfers of EEP animals, meaning all individuals within the EEP population, must be carried out in full consultation with, and are subject to prior approval of the EEP. The EEP Coordinator will be the first point of contact in any correspondence in relation to EEP animal transfers.

**EEP participants must not transfer any EEP animal to or from its collection without prior approval of the EEP.** This requirement applies equally to animals entering the EEP population from external sources and to animals transferred out of the EEP population. Transfers of EEP animals from non-participants to EEP participants will only be approved where the animals are considered valuable to the EEP population. EAZA Members that do not yet hold an EEP species must obtain EEP approval before acquiring such animals, regardless of whether they originate from an internal or external source. Transfers of EEP animals outside the EEP population must follow the rules and procedures set out in [section 3.6.5 Procedure for sending EEP animals outside of programme](#).

Transfers of EEP animals between EEP participants can be performed under one of the following conditions:

- a. Donation (an animal X is made available, free of charge, by participant A to participant B, who becomes the new proprietor).
- b. Exchange (animals X and Y are exchanged between participants A and B, who become the new proprietors of the newly received animals; X and Y do not necessarily belong to the same [EEP] species).

- c. Loan (animal X is transferred from participant A to B, but A remains its proprietor; agreements can be made as to the ownership of the offspring of X).

**In order to ensure the non-commercial status of EEPs any selling of EEP animals must be avoided.** This also applies to animals that are transferred out of the EEP as in accordance with [section 3.6.5 Procedure for sending EEP animals outside of programme](#) and to any parts and derivatives including live specimens (e.g. living cells for cryopreservation purposes) and any other specimens (e.g. whole carcasses, body parts, fluids, hairs, tissue). Transfers should not be arranged via brokers or dealers. When organising transfers following the approval of the EEP, participants should directly contact each other to organise transport details, and if necessary, the EEP Coordinator can act as an intermediate.

### 3.14.2 Transfers recommended for population management

Transfers of animals into, among or out of the EEP population will be recommended by the EEP Coordinator, and approved by the Species Committee, unless alternatively described in programme characteristics as explicitly approved by the EEP Committee. Recommendations are typically issued on an annual basis (unless species-specific factors require more frequent or warrant less frequent recommendations). The EEP Coordinator contacts all participants involved in these transfers and stimulates their timely implementation.

### 3.14.3 Transfers suggested by participants

Participants may suggest additional transfers, not specifically recommended for population management. In such cases they will always contact the EEP Coordinator, who will study the effects of these transfers on population structure. The Coordinator will grant permission if there are no negative effects; alternative transfers will be proposed if negative effects are expected.

### 3.14.4 Placement of animals out of the EEP

Each EAZA Ex situ Programme has its own role(s) and goal(s), as identified in the Regional Species Plan, and a tailor made management strategy and action plan towards achieving these, as laid down in the Long-Term Management Plan (LTMP). As EEPs are operating under the auspices of EAZA the main focus of

many of these programmes will be tailored to *ex situ* populations as held within the EAZA Membership, and where applicable approved non-EAZA EEP participants as per the rules and procedures in [section 3.6 Non-EAZA Members and EEP Participation](#). However, as part of its management strategy EEPs might make animals available for placement outside of the programme. Examples include animals that are bred to support setting up or strengthening *ex situ* population management programmes of other regional zoos and aquarium associations. Or animals that are released into the wild for reintroduction or restocking purposes as in accordance with [section 4.3 Releasing animals to the wild](#).

The key element from the examples above is that animals are bred or otherwise purposely selected to move out of the EEP population in accordance with (one of) the aim(s) of the programme. Under these, or similar, circumstances it is appropriate to place animals outside of the EEP. The EEP application and LTMP must in these cases clearly indicate that this is part of the EEP's management strategy. As per the standard procedure, breeding and transfer recommendations for animals to move out of the EEP population to *ex situ* facilities [within the EAZA region](#) need to be approved by the EEP, including the Species Committee.

When EEP animals move out of the EEP to *ex situ* facilities [outside of the EAZA region](#) they should become part of a population management programme under the auspices of a regional or national association that is a member of WAZA or a credible conservation organisation in that region. If these are not in place, animals should remain part of the EEP, and the institution should be approved as non-EAZA EEP participant as per the procedure as described in [section 3.6 Non-EAZA Members and EEP Participation](#). In case of the latter this might in some cases mean that the EEP participation offers the opportunity to gradually work towards an independently managed, separate (sub)population in that region in the future. In all cases it is important to not only consider the existing EEP population but also to avoid harm by selecting appropriate individuals in support of a healthy population in that region, and to avoid working against Regional Species Planning priorities as in place in those regions. For some species the above will be organised as part of a Global Species Management Plan (GSMP) run under the auspices of WAZA. In exceptional cases, in alignment with the general spirit of the rules and procedures described in this section, EEPs may request the EEP Committee to approve outplacing EEP animals [outside the EAZA region](#) through completion of Appendix 12b form E. Such cases may in particular concern placement of EEP animals from Associate Members outside of the EAZA region.

**EEPs that do not have a strategy in place to breed and select animals to send out of the EEP population must seek to ensure that the population is managed in such a way as to minimise situations where EEP animals cannot be placed by the collective group of EEP participants or potential future new EEP participants.** An important consideration in the EEP application process, and in more detail in the process of developing the LTMP, is therefore to consider whether the proposed goals of an EEP and the demographic and genetic targets based on them are realistically achievable in comparison with the space that is available for the care and management of the species among the EAZA Membership and potential non-EAZA EEP participants. See also [Appendix 3: Template for proposing a new EEP](#) and [Appendix 16: What is a Long-term Management Planning Meeting?](#)

The EEP is responsible for managing the **whole** population including animals that cannot (immediately) be placed among the EEP holders. Bachelor groups, non-breeding groups and other solutions must be taken in consideration while planning the future demographic management. Nevertheless, despite excellent management, situations where space for an EEP animal is not available will arise for a number of reasons:

- a. **Random demographic effects:** Based on the **average** age specific mortality and fecundity rates during the period of time used for the life table analysis, as well as the current age pyramid, analysis software packages such as PMx can indicate how many individuals are **likely** to die next year and therefore how many individuals should be born to ensure that the population increases/decreases by a certain percentage, or stays stable. Based on the *average* number of offspring produced per breeding female per year and the **likelihood** that a female that is given a breeding recommendation actually breeds, the programme can give an indication of how many breeding females **likely** need to receive a breeding recommendation in order for the programme to reach its demographic target for a given year. Because the above calculations contain a lot of averages and because some of the projections in PMx are deterministic (i.e. do not take random events into account), it is likely that despite setting up the recommended number of breeding situations, a population may still end up with slightly more (or indeed slightly less) individuals than required.
- b. **Genetic effects:** Genetic management combined with the current demographic status of the programme may demand that individuals with high mean kinship values should cease breeding. Should these individuals be allowed to produce further offspring, they would be in addition to requirements. This can occur by accident, because of non-compliance

with recommendations, because methods to prevent breeding were shown to carry high risks to the future reproductive potential, because these individuals could be useful to other populations than the EAZA population, etc. In addition, at the time of initiation of the EEP, the lack of management in the preceding time may have resulted in the overrepresentation of a few genetic lines. Care must however be taken not to deprioritise the importance for the programme of too many of these individuals at a time when the programme is not yet demographically stable or at its target size.

- c. **Sex ratio effects:** If the sex ratio at birth, or of the surviving young, is skewed, an unequal number of animals of one sex may arise. Alternatively, the social structure of a species may result in lack of space for certain age/sex classes due to a skewed sex ratio in a stable group. If the sex ratio of surviving young is 1:1, bias towards one sex may thus still arise. However, a few cautions are in order with regards to these types' of situations. In the case of higher numbers of females than males, it would be unwise to remove females from the population before the carrying capacity/target size of the population is reached. One would remove reproductive potential, and one never knows which unforeseen catastrophes might hit the population. Care must also be taken not to remove too many individuals of the dominant sex out of the population before they have had a chance to breed. If only few individuals of a particular sex do a lot of the breeding, the number of their relatives and thus their mean kinship value will rapidly increase. Whenever the social and reproductive strategies of the species permit this, these breeders should be frequently exchanged, which is only possible if a sufficiently large pool of individuals of that sex remains available. A skewed sex ratio in the number of breeding animals also results in a reduced effective population size, which increases the rate of loss of gene diversity in the population. Finally, some gene diversity will be sex specific and only allowing a limited number of individuals of one sex to breed may result in loss of that sex specific diversity.
- d. **Other effects:**
- **Hybrid animals:** Hybrids may exist in EEPs either through historic practices or from revisions in taxonomy.
  - **Accidental breeding:** Contraceptives can fail under certain circumstances, even some normally permanent methods such as vasectomy.

Simply placing animals for which there is no space in the EEP population out of the EEP as an ordinary tool for the management is not acceptable as it may lead to further management problems. For instance, the programme is losing part of its genetic diversity that might be needed in the future. Also, if animals are placed out of the studbook, their descendants may not be easy to trace back, and the animals can later re-enter the EEP e.g. through a new incoming Member of EAZA. This will complicate the genetic management of the species.

The following therefore applies to animals that cannot (immediately) be placed in the EEP population (regardless of whether the EEP animals are needed to achieve EEP goals or not):

- a. Possible recipients of the animals within the EAZA Membership should be sought by advertising the need for new holders by; informing all EEP participants; placing them on the ZIMS Available and Wanted Tool; and announcements in eNews, Zooquaria and/or on the EAZA website.
- b. Potential non-EAZA EEP participants should be sought particularly where the individual animals are important for meeting the goals of the EEP.
- c. If a. and b. are not successful and/or if after having considered that an animal is genuinely and definitely not required for the EEP, and in cases where management euthanasia is not appropriate, it can be decided by the EEP that the individual animal(s) can move out of the EEP within the EAZA region. Declaring that such EEP animals can move outside of the programme must be aligned with the procedures outlined at the beginning of this section ([3.14 Conditions of animal transfers and the role of the EEP Coordinator](#)) and section 3.6.5 [Procedure for sending EEP animals outside of programme](#) and should only be approved by the EEP if they are genuinely in addition to the needs of the programme and will not be required again within the programme in any way.
- d. The decision to place an EEP specimen in either a non-EAZA participant zoo, or outside the programme, must involve not only the EEP Coordinator, but also the whole Species Committee. The Species Committee is responsible for both the decision that the animals may leave the EEP population as well as for making the recommendation where to the animal(s) can move out to and that acceptable standards as under h. are in place. EEP participants may only transfer these EEP animals after the permission of the EEP as communicated through the Coordinator.
- e. If EEP animals are placed outside of the programme, the EEP Coordinator must be alerted to the possibility of these animals or their descendants

re-entering the population. For this reason, all efforts must be made to maintain those animals and any offspring within the studbook. For this reason, it is recommended that the animals are placed on loan rather than in the ownership of the receiving institutions.

- f. Animals sent out of the EEP must have clear physical identifiers preferably of permanent nature.
- g. Where possible and appropriate, future breeding by these EEP animals should be prevented, through sterilisation or some other method of breeding control. The sending institution and the EEP Coordinator should seek assurance from the receiving institution that breeding will be avoided.
- h. If an animal becomes additional to the needs of an EEP, the exporting institution must make sure that the receiving institution fulfils the EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024) and associated Best Practice Guidelines for the species (see also [section 3.14 Conditions of animal transfers and the role of the EEP Coordinator](#)).
- i. Management euthanasia/culling should be considered by the zoo holding the animals as also referred to in c. This is particularly important if animals cannot be placed elsewhere in a facility that is suitably equipped to house and care for them, and the welfare of the animals suffers as a result. EEP animals should not be culled without a written confirmation from the EEP Coordinator that the individual(s) can be removed from the EEP population without jeopardising the demographic and genetic goals of the programme. The decision to apply management euthanasia or not ultimately lies with the EEP Participant and cannot be forced by an EEP Coordinator in either direction. EEP Coordinators must explain and follow the existing EAZA rules, guidelines and positions on management euthanasia (See [Appendix 26 Euthanasia for Population Management: Scientific Background](#), [Appendix 25: Position Statement on Management euthanasia/culling and](#) Section 6.4 of the EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums).

### **3.14.5 Animal transfers between regions**

[Section 3.6 Non-EAZA Members and EEP Participation](#) sets rules and procedures for EEP participation by (non-EAZA) Members outside the EAZA region and section 3.14.4 for sending animals out of the EEP to other regions in exceptional circumstances, respectively. In cases of approved transfers between an EEP

participant and a non-participant outside of the EAZA region in alignment with both previous sections, it is important for the EEP Coordinator to remain in contact with the species Coordinator in the region of the non-EEP-participant if there is a formal breeding programme for the species in that region. Prior to any discussion about approving EEP animal to non-EAZA Members outside of the EAZA region the Coordinator should make sure that the suggested transfer will not interfere with the management plan in that region. Detailed guidelines including steps to consider under various scenarios are available in [Appendix 18: EAZA Guidelines for Animal Transfers between Regions](#)

### **3.14.6 Importation of species from the wild into the EEP**

Wherever possible zoos and aquariums should strive to have self-sustaining animal populations. This is true for animal collections of EAZA Members in general and for EAZA's population management programmes in particular. This means that the importation of wild caught EEP species should be kept to an absolute minimum. The frequency of exchange to and from the wild population is also dependent on the roles and goals an EAZA Ex situ Programme.

As stated above transfers of EEP species from non-EAZA Members to EAZA Members and non-EAZA EEP participants also need approval by the EEP, who will grant permission only if such animals are considered valuable to the EEP population. This also applies to the importation of wild caught EEP species. The following appendix provides further background information in relation to such importations and will be helpful in the decision-making processes: [Appendix 19: EAZA Guidelines for decision making and due diligence, including when importing EEP animals from the wild](#)

Also refer to [section 4.2 Animal acquisition and disposition](#) on the Acquisition and Disposition of animals that in addition to further information in relation to EEP species, also describes the procedures EAZA Members should consider around the importation of non-EEP (or Mon-T) species from the wild.

### **3.14.7 Exportation of species from the EEP to the wild**

Exportation of species from the EEP to be releases to the wild must be approved by the EEP and TAG prior to the release. The rules and procedures in this regard are described in further detail in [section 4.3 Releasing animals to the wild.](#)

### 3.14.8 The role of the EEP Coordinator

Apart from the role of the EEP Coordinator in animal transfers as indicated in the above paragraphs, the Coordinator may act as an intermediary between two participants in the implementation of recommended transfers. Strictly speaking the agreement on the conditions of a recommended transfer is a matter of the participants involved. However, if the participants do not arrive at an agreement on the terms of an important transfer, the Coordinator may try to bring parties together, or, if this turns out to be impossible, the Coordinator will try to find the next best solution for population management by involving a third or a fourth party in the transfer. If no acceptable alternative is found, the Coordinator may put the matter to the Species Committee to decide.

### 3.15 EEP evaluations

Taxon Advisory Groups are responsible for overseeing the functioning of the EEPs that are run under their umbrella. TAG (Vice) Chair(s) should routinely monitor, identify and resolve any issues timely and effectively. TAG (Vice) Chair(s) are encouraged to use the so called System of EEP Monitoring (SEM) on a routine basis (e.g. annually) to help facilitate this task (see [Appendix 17: System of EEP Monitoring](#)) SEM can equally be used to praise EEPs that are functioning well.

In addition to the routinely keeping of oversight, the *success* and *performance* of each EEP is officially evaluated as part of two officially standardised processes:

- A. The *success* of the EEP towards achieving its agreed roles and goals as outlined in the TAG's Regional Species Plan (RSP) and the EEP's Long Term Management Plan (LTMP) is evaluated during the cyclical RSP process (see [2.2.2 EAZA's Regional Species Planning process](#)).
- B. The *performance* of each EEP under the umbrella of the TAG will be evaluated once every five years at the same time as the TAG Evaluation takes place (see section [2.1.1 General TAG principles](#)).

The evaluation of the performance of the EEPs (point B. above) shall be coordinated by the TAG, in cooperation with the respective TAG liaison at the EEO and Evaluation subgroup of the EEP Committee. The evaluation will be based on the following input:

1. As part of the TAG Evaluation process, the EEO will ask each TAG to complete the standardised datapoints included in the System of EEP Monitoring (SEM) for all EEPs under the TAGs umbrella. The TAG is

responsible for coordinating the process of completing the datapoints in collaboration with the respective EEP Coordinators.

2. The EEO will announce in EAZA eNews that the TAG Evaluation has been initiated and will invite EAZA Members and officially approved non-EEP participants to provide feedback on the performance of the EEPs under the umbrella of the TAG, as appropriate. Through an online form EAZA Members and officially approved non-EAZA EEP participants can share the strengths, weaknesses, opportunities and threats for a given EEP, to understand what goes well and what the areas of concern and potential needs for improvement are. EEP Coordinators will also be requested by the TAG (Vice) Chair(s) to inform EEP Participants, including all Species Committee members, to complete the online form. The responses will be collated and anonymised by the EEO, and shared with the TAG (Vice) Chair(s). Based on the collated responses, the TAG (Vice) Chair(s) will complete the relevant sections in SEM as well as provide their overall assessment on the functioning of each EEP.
3. The TAG (Vice) Chair(s) will submit the completed SEM to their TAG liaison at the EEO, who will integrate the results into the existing standardised report that summarises the overall outcomes of the TAG Evaluation process. This report will be submitted to the Evaluation subgroup of the EEP Committee.

#### Evaluation subgroup

The EEP Committee has a TAG and EEP 'Evaluation subgroup' in place that exists of 3-5 members of the EEP Committee and also includes representation from the EEO. On behalf of the EEP Committee, the Evaluation subgroup is responsible for summarising, reviewing, consulting, concluding and reporting the results of the combined TAG and EEP evaluation procedures.

Based on the summary report prepared by the EEO, that includes the input received as part of the TAG Evaluation procedure (see section 2.2.1) as well as the input received from the TAG through SEM, the Evaluation subgroup will organise an online meeting with the TAG (Vice) Chair(s) to discuss the evaluation results, including reflections based on the review of the EEPs. The summary report will be shared with the TAG (Vice) Chair(s) prior to the online meeting.

Following the online meeting, the TAG (Vice) Chair(s) and TAG Members (including the EEP Coordinators) will receive an official letter final from the EEP Committee summarising the outcomes of the TAG Evaluation process, including reflection on the EEP Evaluation component, as well as any suggested recommendations for improvement. For any sensitive or delicate findings on the (mal)performance of particular EEPs, the EEP Committee can decide to (ask the

TAG (Vice) Chair(s) to address these directly with the respective EEP Coordinator and/or EEP Participants (as appropriate).

EEP Coordinators will be requested to share the official letter from the EEP Committee with their EEP Participants. The EEO will also announce completion of the TAG Evaluation process in EAZA eNews. EEP Participants that are not successful in receiving the outcomes through the relevant EEP Coordinator may request them from the TAG (Vice) Chair(s) or the EEO.

### 3.16 Conservation funding from EEPs

There is a difference between institutional funds for *in situ* conservation and similar funds generated in the framework of EEPs. The EEP Committee and EAZA only have a responsibility towards EEP funds generated in the framework of an EEP (accountability).

The EEP Committee appreciates and encourages the direct link between an EEP and *in situ* conservation projects, if relevant. Nevertheless, the following points must be taken into consideration:

- a. Providing funds for *in situ* conservation through an EEP can only be made on a voluntary basis and should not be mandatory.
- b. The provision of funds by an institution to a conservation project in the framework of an EEP should never influence recommendations for breeding and transfers nor lead to any other disadvantage for EEP participants that do not provide funds as opposed to EEP participants that do.
- c. Funding for *in situ* projects in the framework of an EEP need to be approved by the Species Committee.
- d. The TAG should be kept informed about the *in situ* conservation projects that are funded by an EEP.
- e. Projects funded by an EEP must provide a project proposal and annual budget for approval by the Species Committee.
- f. An annual report and annual accounts must be produced and sent to all EEP participants, the relevant TAG Chair, as well as the Chair of the Conservation Committee and the EEP Committee.

- g. All *in situ* conservation projects supported by EEPs should be included in the EAZA Conservation Database.

*In situ* conservation initiatives of a TAG should be dealt with according to the same principles.

When TAGs are looking to raise and distribute funds to relevant conservation, research and /or education projects it is possible to “house” these funds within the EAZA accounts and be administrated by the Executive Office. It is the responsibility of the TAG to discuss this possibility with their Executive Office liaison and complete an application form (See [Appendix 21: EAZA Fundraising Account Application](#)). Applications will be considered in the light of other funds, expected workload for the Executive Office, and overall EAZA financial set-up.

## **3.17 Population management programme communications**

### **3.17.1 Internal communication**

Communication is a very important factor in population management programmes. Lack of communication is a major problem that is most often referred to in the EEP evaluation process. EEP Coordinators should ensure that participants, the Species Committee, the TAG and EAZA Executive Office are updated on relevant events such as breeding and transfer recommendations, minutes of meetings, publication of studbooks, EAZA Best Practice Guidelines and management plans, relevant conservation and research activities, etc. Furthermore, it is important that EEP Coordinators respond in a timely fashion to questions and requests from the participants and other parties involved in the programme. This does not mean EEP Coordinators will have to offer a quick solution to every request or problem. More often than not this will take more time, but in those cases, it is important to at least acknowledge receipt of the request, so the sender knows the EEP Coordinator/will deal with the matter.

Equally important is for participants, Species Committee members, TAG members and the EAZA Executive Office to respond to requests from the EEP Coordinator in a timely fashion and to keep them aware of ongoing developments during the year. Participants in particular might need to have patience before the EEP finds a solution to a particular query as EEP Coordinators are not magicians.

All parties involved in EAZA Ex situ Programmes should remember that EAZA is a multilingual region and that for the majority of people English is not the native

language. These and other cultural differences in correspondence often lie at the heart of communication problems. Therefore, it is important to double check whether the message/request is entirely clear.

It is recommended that EEP Coordinators discuss the communication strategy of the population management programme with the participants and Species Committee, so all parties agree with and are aware of the expected communication processes.

Problems relating to the appropriate and timely communication in the EEPs can be addressed to the EEP Complaint procedures, or the EEP evaluation process. Failure in this regard may result in a warning as per the EAZA Sanction procedure (see Appendix 24) or disciplinary measures for, including the removal from, a EEP or TAG related position (e.g. EEP Coordinator, Species Committee Member, TAG Chair, TAG/EEP advisor) by the EEP Committee.

### **3.17.2. Social media**

Social media is a powerful tool for communicating between groups and to the public. In many places social media is now the top place for news, and the main space where people spend their time.

As such, it can be used by groups such as TAGs or EEPs to share important information and news stories among themselves, or to inform the public about aspects of their work. Conversely, social media can also be problematic, as content can reach unintended audiences or be misunderstood. It provides an interface for the public and organisations to contact and criticise the page owner, a space where media is readily contactable, where content is very easily shared and where controversy is an in-built part of its design. Keep in mind that automatic translation tools, available on social media, can lead to unwanted misunderstandings and wording that may seem innocuous in one language may be more inflammatory in another.

Population management can be a particularly challenging topic to communicate sensitively. Miscommunication can inadvertently damage reputation of the own group/organisation or may have an impact to others in the same community. Using EAZA guidance resources and networks such as the EAZA Communications Committee and the EAZA Advocacy and Communication department can help when communicating this challenging subject.

In 2023, EAZA published [Communication Guidelines](#), to help develop consistent messaging across the EAZA community that reflects transparency, breadth of Members' activity and their professional expertise – and that respects cultural

and national differences while upholding scientific consensus, especially on sensitive issues. The [EAZA Communication Guidelines](#) are available on the public EAZA website.

The EAZA Communication Committee has developed social media guidance to assist TAGs, EEPs, Working Groups and Committees. You are strongly encouraged to read them before starting your social media channel and to involve a communicator from one of the participating institutions in the process (e.g. a communicator working at the institution coordinating the EEP you'd like to set up a page for).

The social media guidance is available from the EAZA Member Area and presented in [Appendix 22: Guidelines for independent EAZA-related social media managers](#) as well. Please be aware that information (presentations, publications) available only on the Member Area of the EAZA website is, by definition, confidential and for the use of Members of EAZA only. You may not share any such information on any channel without the permission of the author and the EAZA Executive Director.

### 3.17.3 Publication and sharing of information through EAZA channels or with media

EAZA Members are encouraged to share news, experiences, articles, research outcomes, etc. through EAZA's printed and electronic publication channels which include:

Zooquaria	Printed quarterly magazine, also available to all on EAZA's website Submissions to <a href="mailto:zooquaria@eaza.net">zooquaria@eaza.net</a>
eNews	monthly electronic newsletter for EAZA Members only Submissions to <a href="mailto:info@eaza.net">info@eaza.net</a>
Journal of Zoo and Aquarium Research	peer-reviewed research articles available to all on <a href="http://jzar.org">jzar.org</a> For submissions, <a href="#">view here</a>
EAZA social media channels on Facebook, LinkedIn and Instagram	Members' stories highlighting the missions of the EAZA community: field conservation, population management, conservation education, research, welfare and advocacy; campaign updates, event information and general news relevant to the community.

Sharing information is important but making sure that the format and tone of the message you share is appropriate to the channel and its audience is essential to limit the risks of misinterpretation. The EAZA communications team can help mitigate those risks by advising the best channels for your message/goal.

**When approached by the media that would like to run a story or documentary on the EEP or TAG you are involved with, please contact the EAZA Communications Team at [press@eaza.net](mailto:press@eaza.net) to discuss options and strategies for cooperation.**

### 3.18 EEP Complaint procedure

The EAZA Ex situ Programmes (EEPs) are very important flagships of EAZA. The better they work the stronger we all are. With many different programmes and several hundreds of participants from countries across the EAZA region, having different languages and cultures, it is impossible to completely avoid problems, and sometimes even conflicts. However, we can all do our part to facilitate the process and thus to make the EEPs even more efficient and effective than they are now.

Disputes within the EAZA Population Management framework must be solved at the lowest possible level. This means that EEP participants must try to resolve any disputes in collaboration with the EEP Coordinator and the Species Committee (and vice versa). All parties must make reasonable efforts to reach a mutually acceptable solution in accordance with applicable EAZA rules and procedures. When, despite reasonable efforts, the parties are unable to reach a suitable solution in alignment with applicable EAZA rules and procedures at the EEP level the EEP Participant or EEP Coordinator shall escalate the matter to the relevant TAG to help solve the problem. Such escalation may be initiated by either the EEP Participant or the EEP Coordinator, as appropriate. Any escalation to the TAG must be accompanied by documentation of the dispute including the nature and substance of the issues in question and a timeline of the steps already taken in trying to solve the dispute at the EEP level. The documentation must be sent along to the TAG through its Chair.

The TAG Chair supported by the TAG Vice chair and TAG Members, must facilitate a resolution that:

- satisfies the legitimate interests of the parties involved;
- complies with TAG and EAZA procedures and principles; and
- does not compromise any standards or principles set out in EAZA governance documents, including the offences identified as sanctionable

in the EAZA Sanctions Document (see reference at the end of this paragraph).

A dispute shall be referred to the EEP Committee only if the dispute cannot be solved at TAG level despite reasonable efforts, or if the TAG has failed to respond to the dispute adequately and within a reasonable timeframe.

At all stages, the EEP or TAG shall establish and communicate clear deadlines specifying when the outcome of a discussion concerning any matter under consideration can be expected. The EEP Committee, supported by the EEP Complaint subgroup of the committee, will deal with complaint cases in accordance with the rules and procedures outlined in this EAZA PMM, other EAZA Standards and Guidelines and the EAZA Sanction document (see [Appendix 23: Sanctions in the case of a violation of the EAZA Code of Ethics and Conduct, EAZA Standards, or EEP Procedures](#)).

EEP (Vice) Coordinators, EEP Species Committee members, EEP Participants, TAG (Vice) Chairs, TAG members and EAZA Members are encouraged to raise concerns at the appropriate level as and when they arise, preferably at the earliest practicable stage to prevent matters from escalating. The EAZA Executive Office is available for any questions and support.

EAZA Members and other appropriate stakeholders must adhere to the internal complaint procedure as outlined in this Section. Furthermore, in the event of disagreement with any decision made by the EEP Committee, the EAZA Member shall first:

1. follow the internal complaint procedure outlined herein;
2. complete the appeal process as specified in the EAZA Membership and Accreditation Manual; and
3. await the final outcome of such appeal process, before initiating or commencing any legal proceedings.

## 4 Institutional population management

This chapter will focus on population management related topics at an institutional level, that go beyond the terms and conditions of participating in EAZA's population management programmes as described in [chapter 3 Working procedures for EEPs](#). The focus will be at those institutional species management topics that are directly or indirectly related to Regional Species Planning and thus go beyond the "day-to-day" animal management practices at institutions. The EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024) and EAZA Best Practice Guidelines are in place for the latter. The difference is sometimes arbitrary and hence there will be cross-references where relevant.

### 4.1 Institutional Species plan

This section focuses on institutional species planning. EAZA Members participate in the EAZA Regional Species Planning and in EAZA Ex situ Programmes as outlined in the previous chapters. In addition, EAZA Members must maintain a written Institutional Species Plan (ISP) in accordance with the guidelines on Institutional Species Planning as described in this chapter. The ISP should be based on the institution's vision/mission and consequent conservation, educational and research goals and objectives.

#### 4.1.1 Rational

An Institutional Species Plan (ISP) gives an overview of the species currently kept and the role of each species in the facility. An ISP might follow from a Masterplan, that can give the framework (focus on experience, theme, geographic orientation) but is not being replaced by a Masterplan. An ISP is a tool that is used to plan the future and progress towards it. The use of an ISP is as much in the process as in the end product. Having an up-to-date and regularly reviewed Institutional Species Plan helps internal communication within a facility and provides transparency and background on the reasoning why a certain animal and/or species is in the facility and what the plans are (e.g. group size, (non) breeding, bachelor group). Depending on the focus of the ISP it is also considering alternative species and/or potential future additions.

#### 4.1.2 Process

- a. The institutional species planning process should be embraced by all departments.
- b. The criteria for the planning process should be clearly stated and reflect the mission of the organisation.
- c. The process should involve an analysis of the species currently kept in the facility. Decisions on which species to keep should follow agreed criteria, which would include such aspects as conservation importance, good animal welfare and public appeal. The plan must be financially realistic (of course).
- d. An overall timeframe for the ISP should be set (usually 3-5 years). The ISP should be reviewed annually and its progress towards a 5-year plan monitored.

#### 4.1.3 When choosing species for the species plan, Members should consider

- a. Whether the species is recommended as part of the EAZA Regional Species Plan (\*), automatically reflecting the conservation status of the species (e.g. IUCN Red List, One-plan approach, CITES –relating to international trade only-, national/regional native species initiatives).
- b. Whether there is a LTMP in place for the species, giving guidance on the future plans for the species.
- c. How the facility is going to contribute to one or more of the selected (in) direct conservation roles of EEPs e.g.
  - contribute towards maintaining a demographically, genetically and behaviourally healthy insurance population
  - and/or contribute towards (financially) supporting conservation projects
  - and/or contribute towards carrying out research relevant for the species
  - and/or contribute towards raising awareness, bringing the conservation educational messages across to the public
- d. The rationale for choosing a species with only non-conservation roles.

- e. EAZA Members must not engage in intentional breeding for the expression of rare recessive alleles. For further information, please refer to the EAZA Standards for the Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024).
- f. Experience of the facility with the species:
  - Has the facility kept and bred this species?
  - If not, has the facility got or can it acquire the necessary staff expertise?

Members should refer in particular to four EAZA publications:

- EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024)
- EAZA Conservation Education Standards (2023)
- EAZA Research Standards (2022)
- EAZA Field Conservation Standards (2022)

Below is a suggestion of what an Institutional Species Plan could look like.

Introduction, capturing the philosophy of focus of a facility.

Common name	Scientific name	Current inventory	Planned inventory	Direct Conservation role(s) (*)	Indirect Conservation role(s) (*)	Non-Conservation role(s) (*)	EAZA RSP Recommendation	Planned actions	Justification of plans
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**(\*) Regional Species Plan (RSP):** In the spirit of the One Plan Approach and through the application of the 5-STEP decision making process in the IUCN Guidelines on the Use of *Ex situ* Management for Species Conservation, TAGs will decide which species are recommended to be managed under an EAZA *Ex situ* Programme (EEP) and what the precise direct, and/or indirect, and/or non-conservation roles of each EEP will be. EEPs are defined as population management activities that are endorsed by EAZA for species that are managed by EAZA members aiming towards (maintaining) healthy populations of individuals with positive animal welfare within EAZA or beyond. For species that are not considered for active management, the TAG will monitor the population trend. Each RSP will be submitted to and approved by the EAZA EEP committee. The most recent RSPs are available on the EAZA website.

*Please check the member area for example Institutional Species Plans from EAZA Members.*

## 4.2 Animal acquisition and disposition

This chapter provides the rules and procedures for the acquisition, disposition and transport of animals to and from EAZA Members. It applies to all animal transfers, to which an EAZA Member is party.

These rules and procedures are tailored to ensuring EAZA Members acquire, transfer, and dispose of animals legally, sustainably and ethically, with due consideration for the welfare of the animals that are transferred. EAZA Members must ensure that any animal transfer involving their institution shall satisfy the requirements of the rules and procedures outlined in this chapter. Furthermore, EAZA Members are required to have a written acquisition and disposition policy in place that reflects these rules and procedures.

The need for and appropriateness of transporting animals to/from EAZA Members is connected to other activities including institutional animal management, species planning, animal welfare, application of population management tools and EAZA Ex situ Programmes. This section should therefore be read in conjunction with other sections as included in Chapter 3 and Chapter 4 of this Population Management Manual.

### 4.2.1 Terms and definitions

The table below provides definitions to the terms mentioned in the chapters below.

<b>Term</b>	<b>EAZA Definition</b>
Animal/Animals	Animals are multicellular, eukaryotic organisms in the biological kingdom Animalia
Specimen	Any animal or plant, whether alive or dead (including any readily recognisable part or derivative thereof).
Controlled environment	Is an environment that is manipulated for the purpose of holding animals of a particular species, that has boundaries designed to prevent animals, eggs or gametes of the species from entering or leaving the controlled environment, and the general characteristics of which may include but are not limited to: artificial housing; waste removal; health care; protection from predators; and artificially supplied food.
Wild caught specimen/animal	Specimens/animals that do not meet the definition of 'captive bred specimen'.
Captive bred specimen	Specimens born or otherwise produced in a controlled environment and shall apply only if the parents mated or gametes were otherwise transferred in a controlled

First-generation offspring (F1)	<p>environment, if reproduction is sexual, or the parents were in a controlled environment when development of the offspring began, if reproduction is asexual.</p> <p>Specimens produced in a controlled environment from parents, at least one of which was conceived in or taken from the wild.</p> <p><i>Note: A first-generation offspring (F1) does not automatically qualify as a captive bred specimen.</i></p>
Offspring of second generation (F2) or subsequent generation (F3, F4, etc.)	<p>Specimens produced in a controlled environment from parents that were also produced in a controlled environment.</p>
Commercial / Non Commercial	<p>An activity can generally be described as 'commercial' if its purpose is to obtain economic benefit (whether in cash or otherwise), and is directed toward sale, resale, exchange, provision of a service or any other form of economic use or benefit. Any transaction which is not wholly 'non-commercial' will be regarded as 'commercial'. All uses whose non-commercial aspects do not clearly predominate shall be considered to be primarily commercial in nature.</p>
Due diligence	<p>Reasonable care and caution or the proper actions that a situation calls for, especially those that help to avoid harm or risk.</p>
Ethics	<p>Moral principles that govern a person's or organisation's behaviour or the conducting of an activity.</p>
Intermediate party	<p>Organisations or private individuals that make money through connecting source and destinations of animals that (potentially) move to or from EAZA Member institutions. Examples are brokers, dealers, consultants, suppliers, etc.</p>
Non-EAZA Member	<p>Any institution or private individual that is not a Member of EAZA.</p>
Precautionary principle	<p>An approach to risk management when there is no factual clarity or scientific agreement on the issue. In this context it means that an acquisition transfer or disposition should not be carried out if it is not clear that it is legal, sustainable and ethical.</p>
Sustainable harvest	<p>Sustainable harvest or sustainable yield is one that does not lead to extinction or an unacceptable decline in the harvested population. The sustainability of a population in the face of harvest depends on the number of animals harvested, who gets harvested, and how much the mortality imposed by harvest can be compensated.</p> <p>Exceptions might apply in case the survival of the species is at risk, and the acquisition is part of a conservation plan by a credible partner organisation (e.g., IUCN) and approved by the local or national competent authority.</p>

## 4.2.2 Legal acquisition and disposition

EAZA Members must ensure that all local, national, regional and international laws and regulations are adhered to when acquiring, transporting, or disposing animals. This applies to all laws and regulations in source, transit and destination countries or areas. Examples include but are not limited to CITES, EU Animal Health Law and the EU Access and Benefit Sharing (ABS) Regulation.

The EU ABS Regulation lays down 'compliance measures for users from the Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from their Utilization', for which a guidance document for EAZA Members is available in [Appendix 31: EAZA and the Nagoya Protocol](#).

Whereas the prime responsibility for EAZA Members concerns the individual animals that are acquired for or disposed from the institution directly, EAZA Members also have a responsibility to avoid indirectly contributing to illegal trade. EAZA Members therefore need to make every reasonable effort to understand the broader context of the trade in the species, including consideration of the ancestry of the animals to be acquired for, or potential future trade (of offspring) of the animals to be disposed from, the institution. In case of lack of clarity or uncertainty, EAZA Members must apply a precautionary principle in their decision making.

## 4.2.3 Sustainable acquisition and disposition

Acquisition or disposition of animals to or from EAZA Members must not lead to the long-term decline of biological diversity in the wild, in order for animals in the wild to maintain the potential to meet the needs and aspirations of present and future generations. This general principle applies when animals are either captured or released into the wild. The next section on ethical acquisition and disposition of animals outlines EAZA rules and procedures that apply in these circumstances in addition to this principle.

## 4.2.4 Ethical acquisition and disposition

EAZA Members must only engage in the acquisition and disposition of animals when it meets the ethical standards as outlined in this section. Ethical acquisition and disposition of animals means that the acquisition and disposition:

- Is subject to a professional process of **due diligence** that considers the broader chain of supply and demand, as described in the section below.

- Is **traceable and transparent**, including through documentation and record keeping.
- **Prioritises captive bred** animals and only involves **importation of wild caught animals when conditions are met** as defined in the section below.
- Only involves **releasing of animals into the wild when specific conditions are met** as described in the section 4.3 on Conservation Translocations.
- Is (primarily) **non-commercial** (dispositions) or preferably (primarily) non-commercial (acquisitions).
- Is prioritised between EAZA Members and can involve **non-EAZA sources or destinations when specific conditions are met** as described in the section below.
- Is preferably arranged directly **without involvement of intermediate parties**, and when this is not possible that such parties meet required conditions.
- Is fully adhering to the **EEP rules and procedures, TAG statements and EAZA Standards, Guidelines and Position Statements**.
- **Meets the welfare conditions for the animals** that are transferred. All animals must be transferred correctly and must be held in appropriate facilities with professional standards at its destination.

### *Due diligence*

EAZA expects all Members to undertake due diligence to ensure the acquisition, transport and disposition of animals is legal, sustainable, and ethical. This includes that every reasonable precaution is taken by EAZA Members to ensure that an animal transfer is not contributing to the illegal sourcing or laundering of animals, or the unsustainable and/or inappropriate removal of animals from the wild. Also, that these transfers do not result in animals being placed into poor welfare conditions, circuses or canned hunting operations.

It is the responsibility of the EAZA Member to ensure due diligence is performed and documented so that they can demonstrate this as and when requested. This will support monitoring the implementation of these rules and procedures and will contribute to supporting EAZA Members in the event of complaints.

### *Traceability and transparency*

EAZA Members must always understand and record who and where animals are sourced from or are destined to. The expectations for EAZA Members with regards to record keeping are outlined in the EAZA Standards for the

Accommodation, Care and Welfare of Animals in Zoos and Aquariums. With regards to the acquisition and disposition of animals it is particularly important that details of the source or destination of the animals are recorded into ZIMS as in accordance with the EAZA Standards for the Welfare, Accommodation and Management of Animals in Zoos and Aquariums.

Any details of rearing methods, breeding techniques used, health, diet/nutrition, reproductive and genetic status and behaviour that might affect management and reproduction of an animal being transferred (or other animals in the group at the receiving institution) should be disclosed at the commencement of negotiations.

EAZA Members can and should enter their available animals on the ZIMS Available and Wanted tool. This will make the EAZA community at large aware of the availability of animals. Furthermore, EAZA Members can turn to the ZIMS Available and Wanted tool to look for animals. Besides the practicalities the Available and Wanted tool offers to EAZA institutions, it also facilitates cooperation with and between EAZA Members and reduces the need to work with intermediaries. Before listing EEP animals on the ZIMS Available and Wanted tool EAZA institutions should get in touch with the EEP Coordinator to seek consent.

#### *Captive bred animals and importation of wild caught animals*

All EAZA Members will endeavour to ensure that animals acquired are bred in captivity. EAZA recognises that there are appropriate circumstances to obtain animals from the wild. However, EAZA Members should only directly or indirectly acquire wild caught animals when one or more of the following two criteria apply:

1. there is a defined direct conservation need and mandate; A defined, direct conservation need must be based on the application of the 'IUCN SSC Guidelines on the Use of Ex situ Management for Species Conservation' and established as part of the EAZA Regional Species Plan, or be part of a defined conservation plan or a defined conservation action (or similar agreement) by a credible partner organisation (e.g., IUCN) or a local or national competent authority.
2. they are confiscated or rescued by the relevant authorities and non-releasable; EAZA Members can provide an important role supporting authorities with the housing and care of animals that are confiscated or rescued, in particular in cases where these animals are non-releasable. EAZA Members are encouraged to consider the 'IUCN SSC Guidelines for the management of confiscated, live organisms' when acquiring confiscated animals.

The above is not applicable to wild caught animals that were already held by EAZA Members on 1 May 2024. Furthermore, there can be exceptional circumstances where the above two criteria do not apply and where Members do have a strong rationale to obtain wild caught specimens (>1 May 2024) as part of their institutional species plan. This might in particular apply for taxa that are not (yet) reliably bred in human care and where animals can be sourced through professional schemes (e.g., fish and invertebrates). EAZA Members must in these exceptional cases have exhausted all the instances to obtain individuals that are born in captivity before deciding to acquire wild caught animals.

EAZA Members must always be confident that acquisitions of wild caught animals are sustainable (i.e., animals are sustainably harvested) and will not have a deleterious effect upon the wild population (see also [4.2.4 Ethical acquisition and disposition](#) and the list of terms for the definition of a sustainable harvest). Exceptions might apply in case the survival of the species is at risk, and the acquisition is part of a conservation plan by a credible partner organisation (e.g., IUCN) and approved by the local or national competent authority. When considering acquiring individuals of a species that are caught in the wild, Members have to perform due diligence to the best of their ability to demonstrate that the animals are/will be sustainably harvested and will therefore not harm the population(s) nor the species. Proper capture techniques should be applied, and animals should be professionally handled and transported (also refer to [3.14 Conditions of animal transfers and the role of the EEP Coordinator](#))

### *Releasing animals to the wild*

Releasing animals to the wild can benefit as well as harm species and biodiversity conservation. EAZA Members must therefore follow the rules and procedures for releasing animals into the wild that are described in [4.3 Releasing animals to the wild](#).

### *Non-commercial*

The acquisition and disposition of EEP animals is organised and decided centrally by the EEP Coordinator and the EEP Species Committee. EEPs are non-commercial. In order to ensure the non-commercial status of EEPs any selling of EEP animals is not allowed and must be avoided.

All non-EEP animal dispositions from an EAZA Member should be (primarily) non-commercial. It is in this respect most important to avoid putting a monetary or other economic value on the individual animals that are disposed. In other words, EAZA Members should not sell non-EEP animals.

EAZA Members can request voluntary donations to conservation projects and may ask for compensation of costs directly related to the disposition of the animals (e.g. transport). Further specific conditions are in place for EEP animals

(See chapter 3.7 Rules of joint population management). Amicably agreed exchanges of non-EEP animals are not considered primarily commercial.

All non-EEP animal acquisitions into an EAZA Member are preferably non-commercial. EAZA Members are encouraged to use alternative options for acquiring animals to avoid buying of animals, whenever such options are available and appropriate.

#### *Prioritising transfers among EAZA Members and cooperation with non-EAZA Members*

The acquisition and disposition of EEP animals is organised and decided centrally by the EEP Coordinator and the EEP Species Committee. This includes transfers of animals between EAZA Members and EEP Participants as well as any other transfer of animals into or out of the EEP population from sources, or to destinations, that are not an EAZA Member. The rules and procedures for EEP species are laid down in Chapter 3, and in particular sections 3.4, 3.6 and 3.7.

EAZA Members should prioritise the acquisition and disposition of (non-EEP) animals from/to other EAZA Members. Exceptions might apply in case of importation from the wild in accordance with a defined need or conservation translocations provided these align with the respective sections above.

Acquisition and disposition of non-EEP animals from/to institutions or persons that are not a member of EAZA (non-EAZA Members) can be appropriate provided that certain criteria are in place. Such exchanges can be important as part of collaborative work with partner organisations. EAZA Members are strongly encouraged to consider the EAZA Regional Species Plans, including conservation and population management needs, when deciding whether or not to exchange animals with non-EAZA Members. Non-EAZA Members receiving animals from EAZA Members must be professional, including following similar standards regarding the legal, sustainable and ethical acquisition and disposition of animals as described in this chapter.

EAZA Members must verify that institutions or persons they dispose animals to have conditions in place to meet the physical, psychological, and behavioural requirements of the animal, including appropriate facilities to hold the animals and skilled staff who can maintain a high standard of husbandry and welfare. Circuses and canned hunting operations would never be regarded as appropriate recipients of animals from EAZA Members. In case of acquisition of animals that responsibility equally applies to the EAZA Member itself.

Non-EAZA Members have not been accredited as part of our EAZA Accreditation Programme (EAP). In the case of dispositions to non-EAZA members, EAZA Members must consider this as part of their due diligence process and use a robust approach to be confident that the recipient has the appropriate standards in place. Preferably this includes either an onsite inspection of receiving facilities or receiving suitable written references regarding facilities and

expertise. Accreditation of zoo and aquarium associations that have equal standards and procedures to EAZA, or membership of organisations that partner with EAZA can also contribute to understanding the level of professionalism of non-EAZA Members.

### *Intermediate parties*

Acquisition and disposition of EEP animals must always be organised with and approved by the EEP (see sections 3.4, 3.6, 3.7 and 3.14). EAZA Members should plan and organise the acquisition and disposition of animals directly with the supplier or recipient destination and avoid the use of intermediate parties (dealers, brokers, consultants, etc.) wherever possible. When this is not (yet) possible, EAZA Members may use the services of intermediate parties to acquire or dispose of animals provide that the following criteria are in place:

- EAZA Members must always know the full details of the supplier and source, or recipient and destination, of the animals and ensure that the acquisition or disposition of the animals is legal, sustainable and ethical as outlined in this chapter.
- Any payments to the intermediate party in cash or otherwise should solely be for services provided to connect the source (exporter) with the recipient (importer). Intermediate parties should not sell these animals.
- It must be clear that in situations where intermediate parties are involved in sourcing animals or helping to find a suitable destination, the responsibility of verifying appropriate facilities and professional standards of the source or destination, still lies with the EAZA Member.

### *EEP, TAG and other EAZA rules and procedures*

EAZA Members must participate in and collaborate with existing EEP and EAZA TAGs as opposed to operating solely on institutional level (also see [3.13 Annual breeding and transfer recommendations](#)) to acquiring or disposing individuals of species for which an EEP exist, EEP approval must be sought. EAZA Members must avoid circumventing the waiting list for the EEP in order to get species quicker than can be provided through the programme.

For the benefit of the future viability of EEP populations, all transfers of EEP animals must be arranged in full consultation with, and the agreement of, the EEP. This also applies to EEP animals that are approved to be placed outside of the EEP population as in accordance with [3.6.5 Procedure for sending EEP animals outside of programme](#).

For non-EEP species (those that are not managed as part of an EEP) it is strongly recommended that EAZA Members consider the TAG's most recently published RSP before deciding whether or not to acquire animals. EAZA Members are

encouraged to get in touch with the relevant EAZA TAG with questions and for advice.

TAG statements that include conditions in relation to the acquisition or disposition of species or individuals, that are endorsed by the EEP Committee, Executive Committee or Council (as appropriate) must be respected in this regard.

### *Care for and welfare of animals*

Before acquiring an animal, EAZA Members must ensure conditions are in place to meet the physical, psychological and behavioural requirements of the animal. As part of the Institutional Species Plan (ISP) this requires continuous periodical assessment after the acquisition (see chapter [4.2.4 Ethical acquisition and disposition](#)).

EAZA Members must verify that institutions or persons they dispose animals to have conditions in place to meet the physical, psychological, and behavioural requirements of the animal, including appropriate facilities to hold the animals and skilled staff who can maintain a high standard of husbandry and welfare. Circuses and canned hunting operations would never be regarded as appropriate recipients of animals from EAZA Members.

Any details of health, diet/nutrition, reproductive and genetic status and behaviour that might affect management of an animal being transferred/disposed (or other animals in the group at the receiving institution) should be disclosed at the commencement of negotiations.

EAZA is not in favour of the 'flooding the market' principle whereby EAZA Members would widely share certain species with private holders (or others) to meet demand and as such avoid that these individuals or institutions obtain animals from unreliable and unsustainable sources. The most important consideration in the context of this section is that it is difficult if not impossible to guarantee that the standards for housing and care at the high number of destinations are met.

The EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024) and EAZA Best Practice Guidelines further define standards and provide guidance that can be used to assess whether a recipient will be able to suitably house and care for species and individual animals.

### **4.2.5 Transport of animals**

All animal transfers should conform to the international standards and national and international regulations applying to the particular species. Where appropriate, animals should be accompanied by qualified staff and/or timely information should be provided that will facilitate the animal's adjustment to its

new home. EAZA Member institutions are recommended to complete the transfer themselves or via specialist and well recommended companies. Refer to [3.14 Conditions of animal transfers and the role of the EEP Coordinator further information on transporting animals.](#)

#### **4.2.6 ZIMS Available and Wanted tool**

EAZA Members can and should enter available or wanted animals on the ZIMS Available and Wanted tool. This will make the EAZA community at large aware of the availability of and requests for animals.

Furthermore, EAZA Members can turn to the ZIMS Available and Wanted tool to look for animals. Besides the practicalities the Available and Wanted tool offers to EAZA institutions, it also facilitates cooperation with and between EAZA Members and reduces the need to work with dealers, brokers and any other intermediaries. Before listing EEP animals on the ZIMS Available and Wanted tool EAZA institutions should get in touch with the EEP Coordinator.

#### **4.2.7 Non breeding recommendations**

In the framework of the implementation of the RSPs, EEP Coordinators can issue non-breeding recommendations e.g. for genetically less important animals and/or when facing a shortage of holding space. Non-breeding recommendations are therefore an important tool for the cooperative management of certain species and thus add to the conservation of global diversity. EAZA Members must follow non-breeding recommendations issued by the EEP. For further information, please refer to the relevant paragraph in [section 3.13 Annual breeding and transfer recommendations.](#)

#### **4.2.8 Contraception (and the EAZA Reproductive Management Group)**

Contraception may be used as a tool for population management. The possible side effects of both surgical and chemical contraception, as well as any negative impact on behaviour (social impact), and the impact of permanent contraception, should be considered before a final decision to implement contraception is made. Adequate contraception measures that can be considered are listed on the EAZA Reproductive Management Group (EAZA RMG) website ([www.eazarmg.org](http://www.eazarmg.org)).

EAZA RMG is an EAZA Working Group under the EAZA Veterinary Committee and aims to support the EAZA Membership, TAGs and the EAZA Ex situ Programmes through:

- a. Compiling information on EAZA experiences with the use of animal contraception;
- b. Curating this information in a database;
- c. Complementing the Association of Zoos and Aquariums (AZA) Reproductive Management Center (AZA RMC);
- d. Identifying gaps in current knowledge on contraception use/efficiency;
- e. Encouraging and focusing research in key areas of need;
- f. Promoting a holistic approach to animal contraception through continuous health surveillance of individuals during and after contraception; and
- g. Making this information readily available to interested parties.

The EAZA Reproductive Biology Support Officer acts as a liaison between the Working Group and the wider EAZA Membership.

#### **4.2.9 Management euthanasia/culling**

EAZA Members may consider and apply management euthanasia (or culling) for population management. [Appendix 26 Euthanasia for Population Management: Scientific Background](#) provides a detailed explanation of the relevance of management euthanasia in the context of EAZAs population management framework and other population management tools such as contraception, imports and exports.

The application of management euthanasia is particularly important to consider when animals cannot be placed elsewhere in a facility that is suitably equipped to house and care for them, and the welfare of the animals suffers as a result.

EEP animals should not be culled without a written confirmation from the EEP Coordinator that the individual(s) can be removed from the EEP population without jeopardising the demographic and genetic goals of the programme. The decision to apply management euthanasia or not ultimately lies with the EAZA Member and cannot be forced by an EEP Coordinator in either direction. It is

important that EAZA Members familiarise themselves with the standards, guidelines and positions of EAZA in relation to management euthanasia. In addition to [Appendix 26 Euthanasia for Population Management: Scientific Background](#) referred to above these also include section '6.4 Management Euthanasia' in the EAZA Standards for the Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024), and the [Appendix 25: Position Statement on Management euthanasia/culling](#).

The management euthanasia technique used must ensure an absolute minimisation of suffering of the animal during the process of ending its life. [Appendix 27 Veterinary Considerations for Management Euthanasia](#) provides veterinary considerations with regards to the application of management euthanasia, including opportunities and appropriateness of using carcasses as food for carnivores held by the EAZA Member.

Any management euthanasia/culling procedure by an EAZA Member must conform to the national legislation of the country in which it is located.

### **4.3 Releasing animals to the wild**

This section describes EAZA's rules and procedures for the intentional releasing of animals from EAZA Members to the wild. To avoid confusion and to align ourselves with language used in the international conservation community, we will use the term conservation translocations in this chapter. The IUCN Guidelines for Reintroductions and Other Conservation Translocations (2013, adopted by EAZA Council in 2015) provide the following definition:

Conservation translocation is the intentional movement and release of a living organism where the primary objective is a conservation benefit: this will usually comprise improving the conservation status of the focal species locally or globally, and/or restoring natural ecosystem functions or processes. This includes Population Restoration (Reinforcement and Reintroduction) and Conservation Introduction (Assisted colonization and Ecological replacement).

Animals transferred from an EAZA Member to an *ex situ* destination for breeding and subsequent release of offspring do not fall within the formal definition of a Conservation Translocation, however, such transfers must adhere to the same rules and procedures outlined in this chapter.

Rehabilitation and release of rescued animals is not part of this definition and indeed a very different scenario. Whilst not the focus of this chapter, EAZA

Members involved in the rescue of animals should always consider the health, welfare and chances of survival of the rescued individual(s) as well as any impact on the wild population before releasing them back after the rescue operation.

Animals that are unintentionally released into the wild (escapes, releases by the public, thieves or animal rights activists) are also not included here. Section 4.4 Invasive Alien Species outlines the procedures in place for avoiding unintentional release, linked to alien invasive species.

This chapter, in summary, describes the rules and procedures that apply to every animal that intentionally moves out of an EAZA Member collection to the wild as part of a conservation translocation. Any other intentional release of animals into the wild, with the exception of rescued animals that are released after rehabilitation, is not supported by EAZA, and Members must not pursue such initiatives. Conservation Translocations from the wild to the wild that EAZA Members might be involved in are not included as part of the rules and procedures described here.

These procedures are applicable to all animals that the EAZA Member holds the responsibility for management for. They for example do not apply to range state projects that an EAZA Member might support financially or in kind, without having ownership of or responsibilities for the animals managed that might be held as part of such project.

#### **4.3.1 Rules and procedures for conservation translocations from EAZA Members**

There are a number of general principles that must apply to all Conservation Translocations where animals move from EAZA Members into the wild:

- a. There should be a document describing that the Conservation Translocation is in accordance with the IUCN Guidelines for Reintroductions and Other Conservation Translocations (IUCN, 2013), that must be prepared in advance of the project taking place. This document must follow the structure set out in the IUCN Guidelines to ensure that best practice is adhered to.
  
- b. The species conservation needs, for example as defined in species or habitat conservation action plans of conservation organisations and statutory authorities, must determine if a Conservation Translocation is the most appropriate conservation intervention when considering Conservation Translocations. Lack of space for placing animals, commercial gain, PR or marketing and communication are not considered to be acceptable arguments for the release of animals from EAZA Members.

- c. Involvement of and cooperation with *in situ* partners and local authorities is of key importance.
- d. As with all destinations, the EAZA Member holds final responsibility to decide if the destination the animals is disposed to, in this case released into the wild, is appropriate.

There are two scenarios for Conservation Translocations involving animals from EAZA Members:

4. the animal(s) are part of an EAZA Ex situ Programme;
5. the animal(s) are not part of an EAZA Ex situ Programme.

The next sections will describe the rules and procedures for both scenarios.

If the animal(s) is/are part of an EAZA Ex situ Programme (EEP):

- a. For animals managed under an EAZA Ex situ Programme (EEP), the TAG is responsible for reviewing project quality and alignment with conservation goals. The EEP Committee holds final responsibility for approving such conservation translocations and verifying that all key considerations have been addressed and supporting documentation is in place.
- b. As the body responsible for evaluating and confirming whether the Conservation Translocation of an EEP species is appropriate, the TAG must consider the following points:
  - Is there an argued project proposal documenting that the proposed Conservation Translocation is in accordance with the IUCN Guidelines for the Reintroduction and other Conservation Translocations (including all sections if the guidelines, amongst other on the release techniques, pre- and post-release monitoring, biosecurity/ disease transmission risks, safety of human populations -for example when reintroducing/releasing hazardous animals, financial security of programme, veterinary risks)?
  - Is there a conservation action plan (or equivalent) in place that points to the need for Conservation Translocation in support of the species survival in the wild?
  - Is the Conservation Translocation supported by the relevant IUCN SSC Specialist Group and/or other appropriate conservation authority?
  - Is the Conservation Translocation supported by the range state authorities?

- Is there a need for formalising a Memorandum of Understanding between EAZA/EEP and partners involved in the Conservation Translocation?
  - Is the Conservation Translocation aligned with the roles and goals as set for the EEP as part of the TAG's Regional Species Plan?
  - Has a Long-Term Management Plan for the EEP been produced and has there been sufficient consideration given towards avoiding negative impact of releases of EEP animals for the *ex situ* population?
  - Has the EAZA Conservation Translocation Working Group reviewed the proposal?
- b. When evaluating the Conservation Translocation proposal based on the points above, the TAG is strongly encouraged to cooperate with external *in situ* organisations and the relevant range state authorities.
- c. The EEP Coordinator and EEP Species Committee (or equivalent) are responsible for preparing and submitting the documentation as described above to the TAG, as much as possible working in cooperation with conservation organisations and range state authorities.
- d. The EEP Coordinator and EEP Species Committee are responsible to select and recommend animals for release. The EAZA Population Management Centre can provide support when necessary.
- e. Before animals can be approved for a transfer out of the EEP to a Conservation Translocation project, the TAG must submit a completed standardised form to the EEP Committee (see [Appendix 32 Example of Conservation Translocation project checklist](#)) for final approval. This form will help the EEP Committee to verify that the TAG has considered the expected elements of a conservation translocation process and that appropriate supporting documentation is available (e.g., project plan, conservation action plan, MoU).
- f. The EEP Coordinator, or someone appointed by the species Coordinator is responsible for the coordination of the above outlined EAZA review process among all steps and stakeholders. If the EEP Coordinator position is vacant the TAG will appoint someone who is (temporarily) responsible.
- g. The EAZA Executive Committee is responsible for approval of and endorsing formal agreements related to Conservation Translocations, upon prior approval from, and as proposed by, the EEP Committee. For

example, Memoranda of Understanding describing commitments of EAZA and other partners in relation to the Conservation Translocation. Such agreements do not have an EAZA status if these are not approved by the Executive Committee and signed by the EAZA Chair.

- h. Conservation Translocations must not proceed without the explicit approval of the EEP Committee, TAG and EEP Species Committee (if in place).
- i. The EAZA Member(s) involved in this conservation translocation are required to enter the conservation translocation into the EAZA Conservation Database. Especially when conservation translocations involve releasing animals from multiple EAZA members over a longer period of time, the EEP Coordinator might help coordinate input into the EAZA Conservation Database.

If the animal(s)\* is/are not part of a managed EAZA Ex-situ programme:

- a. The EAZA Member is responsible for evaluating and deciding if the Conservation Translocation of the non-EEP species is appropriate. The EAZA Member must consider the following points:
  - Is there an argued project description documenting that the Conservation Translocation is in accordance with the IUCN Guidelines for the Reintroduction and other Conservation Translocations (including all sections of the guidelines, amongst other on the release techniques, pre- and post-release monitoring, biosecurity/ disease transmission risks, safety of human populations -for example when reintroducing/releasing hazardous animals, financial security of programme, veterinary risks)?
  - Is there a conservation action plan (or equivalent) in place that point to the need for Conservation Translocation in support of the species survival in the wild?
  - Is the Conservation Translocation supported by the relevant IUCN SSC Specialist Group and/or other appropriate conservation authority?
  - Is the Conservation Translocation supported by the range state authorities?
  - Is there a need for formalising a Memorandum of Understanding between the EAZA Member (or Members) and partners involved in the Conservation Translocation?
  - Is the Conservation Translocation aligned with the roles and goals as set in the TAG's Regional Species Plan, and is the TAG in support

- of the Conservation Translocation? The EAZA Taxon Advisory Group should be contacted for advice.
- Is the Conservation Translocation not hampering species roles as part of the TAG's Regional Species Plan? The EAZA Taxon Advisory Group should be contacted for advice.
  - Has a Long-Term Management Plan for the population been produced and has there been sufficient consideration given towards avoiding negative impact of releases of animals on the *ex situ* population?
  - Has the EAZA Conservation Translocation Working Group reviewed the proposal?
- b. The EAZA Member(s) involved in this conservation translocation is/are responsible for the coordination of the above outlined EAZA review process among all steps and stakeholders.
- c. If EAZA is to become part of a formal agreement for the conservation translocation, the EAZA Executive Committee is responsible for approval of and endorsing such formal agreements related to Conservation Translocations of non-EEP species. For example, Memoranda of Understanding describing commitments of EAZA and other partners in relation to the Conservation Translocation. Such agreements do not have an EAZA status if these are not approved by Executive Committee and signed by the EAZA Chair.
- d. EAZA Members are encouraged not to proceed with the Conservation Translocation without the explicit approval of the TAG.
- e. The EAZA Member(s) involved in this conservation translocation are required to enter the conservation translocation into the EAZA Conservation Database.
- f. In the evaluation process EAZA Member(s) is/are strongly encouraged to cooperate with *in situ* organisations and the relevant range state authorities.

\* In case EAZA Members are involved in conservation translocations of plants they should follow a similar process as described above for animals. Rather than referring to the relevant Taxon Advisory Group, in these cases the EAZA Zoo Horticulture Group may be consulted as to whether the Conservation Translocation is appropriate. In this regard cooperation with organisations such

as Botanical Gardens Conservation International (BGCI) are of key importance as well.

These rules and procedures will not be implemented retrospectively and thus not consider projects and releases prior to 2019. From the date of approval of the PMM document onwards, EAZA Members, TAGs and EEPs must follow the working procedures as described above. Failure to do so will be considered as a breach of an EAZA Standard and will be treated as such in case of any follow up.

#### **4.4 Invasive Alien Species**

EAZA Members must prevent introduction of invasive alien species at all times. This means that EAZA Members must take appropriate measures to prevent the escape and accidental release of animals and plants into the wild, thereby paying particular attention to species that in potential are at risk of becoming an alien invasive species in the EAZA region. In addition, EAZA Members must prevent unintentional introduction of species or pathogens into the environment via waste water e.g. from aquarium tanks. All waste water should be treated using appropriate sterilisation methods prior to being discharged.

EAZA Members should follow the European Code of Conduct on Zoological Gardens and Aquaria and Invasive Alien Species (October 2012), which was written by EAZA and the IUCN SSC Invasive Species Specialist Group. EAZA Members must also abide by national or regional legislation on Invasive Alien Species, for example the Invasive Alien Species (IAS) Regulation that is in place in the European Union (Regulation (EU) 1143/2014 on invasive alien species).

#### **4.5 EAZA Animal Transport Guideline**

EAZA Members must ensure animals are fit before being transported and should ensure that the means of transport (crates, tanks, boxes, vehicles, etc.) are appropriate and guarantee the welfare of animals and the safety of staff from loading until releasing at final destination. Where appropriate, animals should be accompanied by qualified staff. EAZA Members should assess the need to exchange staff prior to and/or after the transport to reduce potential stress. All parties involved in the transport are responsible for the relevant exchange of information prior to, during and after transport. The 'EAZA guideline on Animal Transport' (see [Appendix 24: EAZA guideline on animal transport](#)), species-specific EAZA Best Practice Guidelines and the IATA Live Animal Regulations should be consulted prior to transport.

## 4.6 Ownership of animals within EAZA

To ensure proper management of the animals in EAZA institutions it is essential to distinguish between ownership and holding responsibilities and to establish the obligations that apply to EAZA Members regardless of ownership status.

Ownership of an animal confers the right to make decisions about the animal in question whereas the responsibility for care, health and welfare lies with the holder. Where the owner and holding institution are the same institution, decision-making authority and the responsibility for the animals go hand in hand. But in cases of animals on loan, the owner and the holder are two separate institutions. In such cases the right to make decisions still stays with the owner (unless otherwise decided in the loan contract) whereas the responsibility for the animal (care, health, welfare) is transferred to the holder that has the animal on loan.

Animals born from animals owned by the institution where the animal is born obviously belong to the owner. But in cases where animals are born by animals on loan to another institution the ownership of the offspring must be described in a loan agreement, noting that EAZA has strong preference for the ownership of offspring to reside with the holding institution.

In order to avoid confusion, it is thus essential that a loan agreement is signed by both parties in all cases of animals transferred on loan, and that ownership of any offspring is specifically addressed in this agreement. Since EEPs are no legal entities and cannot own animals, loan agreements shall not simply state that offspring “must be disposed of in accordance with the EEP” or anything along the same lines. Instead, loan agreements shall (i) explicitly identify the owner of any offspring; (ii) include express provisions on the responsibility for decisions relating to the disposal of the offspring.

EAZA Members that hold EEP-managed animals are required to comply with EEP recommendations regardless of whether they own the animals in question. Where an EAZA Member holds an animal that it does not own, that Member remains responsible for using all reasonable efforts to ensure compliance by the owner with EEP recommendations, including but not limited to breeding recommendations, transfer recommendations, and other management decisions and EAZA Members must ensure that ownership arrangements do not impede, delay or prevent compliance with EEP breeding and transfer recommendations and other associated activities.

The communication with regards to EEP species is between the holder and the EEP Coordinator. EEP Coordinators only refer recommendations to the holders, and in case the holder is not authorised to make the necessary decisions about transfers etc. it is up to the holder to clear the recommended transfers etc. with the actual owner as per its obligation to use all reasonable efforts to ensure compliance by the owner with EEP recommendations. Ownership will be one of the factors considered in the assessment whether the implementation of transfer recommendations can be effectuated.

#### **4.7 Institutional Species Planning and Demonstration animals**

EAZA has Standards in place on the use of animals in public demonstrations and ambassador animal interactions that EAZA Members must follow (refer to section 4.5 of the EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024). In relation to population management, the section on Health (point 6.) and Animal selection (point 8.) are of particular importance.

Additionally, for some taxa the relevant TAGs have produced further taxon specific guidelines within the framework of these Standards which, after approval by the EEP Committee, are published on the open area of the EAZA website (in the Best Practice Guidelines section). All EAZA Members should follow these taxon specific guidelines on animal demonstrations, and - whenever necessary- should make improvements or adjustments within a reasonable period of time.

#### **4.8 EAZA Biobank**

The success of EAZA Ex situ Programmes relies to a large extent on intensive demographic and genetic population management. Currently, the majority of genetic management in zoos is individual, pedigree-based management. Whilst successful for some EEPs it can be problematic for others because pedigree records might be incomplete, and relatedness of founders can be built on assumptions. Furthermore, many species still have taxonomic uncertainties and for others, their natural history does not lend itself to individual pedigree-based management (e.g. group living species). DNA-analysis is a key tool to improve knowledge of a population's genetic make-up and furthermore ensure that, as far as possible, captive populations represent the genetic diversity of the wild

counterparts. Thus, DNA-analysis holds great impact on animal health and welfare.

In recent years, molecular genetic techniques and tools have become readily available to the zoo and the conservation communities alike. The ongoing technological advances coupled with decreasing prices will continue to create additional opportunities. If genetic samples are available, can we make use of these opportunities and open up a huge range of possibilities for the use of molecular genetics to help improve the management of EAZA Ex situ Programmes. Adding a genetic layer to a studbook provides information such as origin and relatedness of founders, which was previously built on assumptions, and helps resolve paternity issues. Genetically identifying the origin of individuals can help set up the correct breeding groups and reviewing the programme genetically using PMx will increase its chance of success.

The EAZA Biobank serves as the centralised EAZA-wide DNA repository. This biobank has the ambitious aim to hold DNA/tissue/genetic material from all animals in EAZA, and is designed such that samples are stored properly, securely, and are available for genetic analyses to benefit intensively managed populations. The EAZA Biobank creates interesting research opportunities ranging from population management applications (e.g. veterinary molecular diagnostics and/or adaptive processes) to more scientifically fundamental research questions.

The EAZA Biobank operates through four hubs across the EAZA community, each with adequate facilities and staff available to support the operations. These hubs keep, curate and register samples of all individuals sampled and appropriate records of available samples will be maintained in the Zoological Information Management System (ZIMS). All EAZA Members are requested to sample their animals opportunistically and are encouraged to send samples to the Biobank on donation or loan. Samples are to be sent to the Biobank hub assigned as relevant for the country the Member is located in, thereby improving the efficiency of sample submission.

While the biobank does not currently have capacity to store living, cryopreserved samples, EAZA recognises the importance of these samples, and as such, aims to facilitate access to cryopreservation biobanking facilities for EAZA Members to support the objectives and goals of the EAZA EEPs and LTMPs. The goal is to establish an EAZA Cryopreservation Network, under the guidance of a select Cryopreservation Interest Group (CIG), to be comprised of qualified EAZA and non-EAZA service providers with liquid nitrogen storage capacity and

cryopreservation expertise and who prioritize conservation outcomes and commit to operating in alignment with EAZA's mission and values.

Please refer to <https://www.eaza.net/biobank/> for more detailed documents about the EAZA Biobank, which includes; EAZA Biobank Terms of Service, Standard Operating Procedures for EAZA Biobank Hubs and a number of samples collection and use related documents (including the Sampling Protocol, Material Transfer Agreements and Terms of Conditions). Additionally, resources for cryopreservation including a template partner agreement and template Material Transfer Agreements are available at this page on the EAZA website.

The operations of the EAZA Biobank is overseen by the EAZA Biobank Working Group, which reports to the EAZA Research Committee. The EAZA Biobank and the Working Group's activities are coordinated and supported by the EAZA Biobank Coordinator at the EAZA Executive Office. For further information please refer to the EAZA Biobank Working Group pages on the EAZA Member Area.

#### **4.9 Theft of (EEP) animals from EAZA Member institutions**

Illegal wildlife trade is among the biggest crimes globally and is comparable in scale with other major crimes such as human trafficking and illegal trade in drugs and weapons. Unfortunately, zoos and aquariums can become a victim of illegal wildlife trade as an increasing number of species held by EAZA Members are vulnerable to theft.

First and foremost, EAZA Members should assess the most appropriate methods and equipment to provide sufficient security to prevent animal thefts (e.g. secure enclosure construction and suitable alarm and monitoring system). Measures may differ between species with some species like smaller primates (Callitrichids, squirrel monkeys), birds (parrots, hornbills) and reptiles (turtles) most often subject to thefts. Species related security advice can be obtained from EAZA Best Practice Guidelines or from the respective EEP Coordinator or TAG.

It is also important to have good a relationship with the local police. Depending on the institution's agreement the local police should be kept informed of all relevant security measures taken on board by your institution. In case of animal thefts institutions are requested to always report (attempted) animal thefts to the local police, and to encourage them to report thefts to Europol (Europol is the official EU's law enforcement agency and formed in 2010. One of its main

tasks is to fight illegal trafficking of (endangered) animal species. More information on Europol can be found under <https://www.europol.europa.eu/>).

In addition to reporting to the local police and to Europol, all cases of an animal theft should be reported to the EAZA Ex situ Programme (if in place), TAG, EAZA Executive Office and if applicable your national zoo and aquarium association. The EAZA Executive Office will usually share the information about the theft with all EAZA Members and will ask Members to remain alert for burglars and for when they see animals appear on the market. If relevant we will also inform relevant stakeholder within the European Union (e.g. from the CITES office). The EAZA Executive Office will be able to provide input on related media enquiries if needed.

EAZA institutions should follow the same process where possible when animal parts or derivatives have been stolen.

## 5 Training/Further information

### 5.1 Population Management Training under the EAZA Academy

Newly appointed EEP Coordinators must participate in the Introduction to EAZA *Ex situ* Programme Management Course and attend at the first course that is organised after being formalised into these positions. Or if that is not possible, latest the second course organised after being formalised into the position. Established programme leaders as well as colleagues considering taking on a programme in the future are free at all times to request participation in a course if they feel that they would benefit from doing so.

#### 5.1.1 Introduction to EAZA Ex Situ Programme Management Course

The Introduction course enables participants to gain a basic understanding of the genetics and demographics behind population management. It gives a practical in-depth introduction to globally used studbook software (ZIMS for Studbooks), and a shorter introduction of specialist software designed to support effective management of populations into the future (PMx). It introduces participants to EAZA structures, working procedures and staff. The skills and understanding learnt on this course enable greater confidence and ability in appropriate decision making when managing EEPs.

The content of the Introduction course is:

- a. Why manage zoo populations?
- b. Genetic management of zoo populations;
- c. Population demographics;
- d. Factors that affect population goals;
- e. Use of specialist studbook keeping and studbook analysis software such as ZIMS for Studbooks and an introduction to PMx. Introducing web based tools;
- f. EEP working procedures and EAZA structures
- g. Practicalities of running an EEP, including common problems and how to manage them.

### 5.1.3 Further EAZA Academy courses

Besides the two mentioned courses EAZA offers a variety of other courses under the umbrella of the EAZA Academy, for example there is an institutional species planning course aimed at curators and zoo managers but equally relevant for newly appointed TAG Chairs and Vice chairs. For an overview of courses and more information about the EAZA Academy please refer to the Academy pages on the EAZA website.

## 5.2 EAZA website, Zooquaria and other publications

Programme Coordinators, TAG Chairs, Advisors and programme participants are advised to read and use the relevant sections of the subsequent editions of EAZA's quarterly magazine Zooquaria, EAZA eNews, EAZA's social media (Facebook and LinkedIn) as well as the relevant parts of the EAZA website (Member Area) ([www.eaza.net](http://www.eaza.net)). These regularly contain important information on developments in TAGs and the programmes under the TAG's remit. In order to receive a password to enter the Member Area, to get a copy of Zooquaria and to subscribe to eNews, please get in touch with the EAZA Executive Office.

An up to date overview of all TAGs and programmes including contact details of the programme managers is available from the Member Area of the EAZA website.

## 5.3 Additional questions and support

EAZA Members, EEP Coordinators are encouraged to ask for support from the EAZA Executive Office regarding specific problems in the development of programmes and in the use of computer software for studbook compilation and analyses.

The Population Management Centre at the EAZA Executive Office can support with specific problems in the development of EAZA Ex situ programmes and in the use of computer software for studbook compilation and analyses. Species-specific support can be obtained from the TAG relevant to the population management programme species, or from programme managers working with related species. Finally, useful information can also be gained by attending the EAZA Annual Conference and from discussions with colleagues.

All forms/templates are available to download on the EAZA Member Area.



## Overview of Appendixes

[Appendix 1: References and Recommended further reading](#)

[Appendix 2a: EAZA Regional Species Plan, standard format](#)

[Appendix 2b: Species Assessment Sheet](#)

[Appendix 2c Standard RSP role descriptions](#)

[Appendix 2d: Investigating potential ex situ Conservation Roles](#)

[Appendix 3: Template for proposing a new EEP](#)

[Appendix 4: EAZA Best Practice Guidelines template](#)

[Appendix 5 a: TAG Evaluation - TAG Chair Questionnaire](#)

[Appendix 5 b: TAG evaluation - TAG member questionnaire](#)

[Appendix 5 c: TAG Evaluation - EEO Questionnaire](#)

[Appendix 5 d: TAG Evaluation: Standard Summary Report](#)

[Appendix 6: Proposal for new TAG](#)

[Appendix 7a: Example letter of confirming support to a TAG \(Vice\) Chair](#)

[Appendix 7b: Example letter of providing institutional support to an EEP \(Vice\) Coordinator](#)

[Appendix 7b: Example letter of providing institutional support to an EEP \(Vice\) Coordinator](#)

[Appendix 7c: Example letter of withdrawing institutional support](#)

[Appendix 7d: Example letter for providing TAG support for EEP Coordinators](#)

[Appendix 8: Decision tree EAZA EEP participation procedure](#)

[Appendix 9: Temporary Member participation in an EEP - standard format for requesting approval from the EEP Committee - Application form A -Temporary Membership \[including Temporary Membership under construction\]](#)

All forms/templates are available to download on the EAZA Member Area.



[Appendix 10: Candidate for Membership participation in an EEP - standard format for requesting approval from the EEP Committee Application form B – Candidate for Membership](#)

[Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval from the EEP Committee - Application form C –Non-Member of EAZA, in EAZA region](#)

[Appendix 12a: Non-EAZA institution participation in an EEP- standard format for requesting approval from the EEP Committee -Application form D – Non-Member of EAZA, the proposed EEP participant is located out of the EAZA region.](#)

[Appendix 12b: Non-EAZA institution, outside the EAZA region - standard format for requesting outplacement approval from the EEP Committee - Application form E – Non-Member of EAZA, the proposed facility is located outside the EAZA region.](#)

[Appendix 13: EAZA Template contract for non-EAZA EEP participants](#)

[Appendix 14: EAZA studbook template](#)

[Appendix 15: Guidelines for Veterinary Advisors appointed to EAZA TAGs and EEPs](#)

[Appendix 16: What is a Long-term Management Planning Meeting?](#)

[Appendix 17: System of EEP Monitoring](#)

[Appendix 18: EAZA Guidelines for Animal Transfers between Regions](#)

[Appendix 19: EAZA Guidelines for decision making and due diligence, including when importing EEP animals from the wild](#)

[Appendix 20: EAZA Template Programme Annual Report](#)

[Appendix 21: EAZA Fundraising Account Application](#)

[Appendix 22: Guidelines for independent EAZA-related social media managers](#)

[Appendix 23: Sanctions in the case of a violation of the EAZA Code of Ethics and Conduct, EAZA Standards, or EEP Procedures](#)

[Appendix 24: EAZA guideline on animal transport](#)

[Appendix 25: Position Statement on Management euthanasia/culling](#)

[Appendix 26 Euthanasia for Population Management: Scientific Background](#)

All forms/templates are available to download on the EAZA Member Area.



[Appendix 27 Veterinary Considerations for Management Euthanasia](#)

[Appendix 28: Guidelines for population management programme administration and handover](#)

[Appendix 29: Access Roles in ZIMS for Studbooks](#)

[Appendix 30: Template Non-Disclosure Agreement EAZA Studbook Data](#)

[Appendix 31: EAZA and the Nagoya Protocol](#)

[Appendix 32 Example of Conservation Translocation project checklist](#)



## Appendix 1: References and Recommended further reading

### Reference used in text

- Baker, A., Lacy, R.C. & Traylor-Holzer, K. (2011). Intensive management of populations for conservation. *WAZA Magazine*, 12, 40-43.
- Barongi, R., Finken, F. A., Parker, M. & Gusset, M. Editors. (2015). *Committing to Conservation: The World Zoo and Aquarium Conservation Strategy*. Gland, Switzerland: WAZA Executive Office.
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- McGowan, P. J. K., Traylor-Holzer, K. & Leus, K. (2016). IUCN Guidelines for determining when and how ex situ management should be used in species conservation. *Conservation Letters*, 10(3): 361-366.
- Redford, K. H., Jensen, D. B. & Breheny, J. J. (2012). Integrating the captive and the wild. *Science*, 338, 1157-1158.

All forms/templates are available to download on the EAZA Member Area.



- Redford, K. H., Jensen, D. B. & Breheny, J. J. (2014). The long overdue death of the ex situ and in situ dichotomy in species conservation. *WAZA Magazine*, 14, 19-22.
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- Species360. 2018. ZIMS.Species360.org.

### Recommended further reading

- Ballou, J. D. & Lacy, R. C. (1995): Identifying genetically important individuals for management of genetic diversity in pedigreed populations. In: *Population management for survival and recovery*. Ballou, J. D., Gilpin, M. & Foose, T. J. (Eds.). New York, NY: Columbia University Press, Pp. 76–111.
- Ballou, J.D., Lees, C., Faust, L.J., Long, S., Lynch, C. Bingaman Lackey, L. & Foose, T.J. (2010). Demographic and Genetic Management of Captive Populations. In: Kleiman, D.G., Thompson, K.V. & Bear, C.K. (Eds.) *Wild Mammals in Captivity – Principles and Techniques for Zoo Management*, Second Edition. The University of Chicago Press: Chicago and London. Pp 219-252.
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- Lacy, R.C. (1994) Managing genetic diversity in captive populations of animals, in *Restoration of Endangered Species* (Eds. Bowles, M.L., Whelan, C.J.) (Cambridge University Press, Cambridge, U.K., Pp. 63-89.
- WAZA Magazine. (2011) – Volume 12: Towards Sustainable Population Management.

All forms/templates are available to download on the EAZA Member Area.



## Appendix 2a: EAZA Regional Species Plan, standard format

This appendix will give an overview of the standard format for the development and publication of EAZA Regional Species Plans. As we continuously gain experience with the population management structure this standard format will be adapted and changed as necessary over time.

### ***Contents of an RSP***

Each EAZA RSP should include the following sections:

1. Cover
2. Introduction
3. Summary table
4. Species assessment sheets
5. References
6. Appendices

The following sections will provide more details regarding the various sections outlined above.

#### **1. Cover**

The cover of the RSP should include the following information:

- Name of TAG
- Taxa covered by this volume (if different from total taxa covered by TAG)
- Date of publication
- Edition nr.
- EAZA logo
- Potentially include TAG logo, or logos of other participating organisations if they are partners in the planning and implementation of the document

Inside cover

- Editors of document
- Citation
- Acknowledgements
- Photo credit for front cover



## 2. Introduction

- Description of philosophy and outline of EAZA population management structure  
Standardised text to be provided by EEO - *including info on OPA, TAGs and SGs/in situ collaboration, application of IUCN ex situ guidelines, management categories, that each EEP can be tailored to needs, relationship between RSP, EEP application and Long-Term Management Plan content and processes etc.*
- TAG mission statement (if applicable)
- TAG definition (specifying all taxa within TAG remit)  
Taxonomic scope of this RSP volume (*if TAG is splitting total taxon in different groups to have separate RSPs*) and background on (selection) process/ and/or methodology used for this specific TAG
- Reflection on space competition and feasibility
- Additional optional subtopics (e.g. support to in situ conservation)

## 3. Summary tables

Each RSP should include a summary table(s) that provides RSP users with a quick overview of the recommendations and selected conservation roles (direct, indirect, non- conservation) and/or support activities for each taxon. Additional columns of information as current population size, desired future population trend, are included.

### **EAZA RSP categories:**

**EEP** – EAZA *Ex situ* Programme. The taxon needs proactive management by EAZA to fulfil its specified *ex situ* roles. This includes programmes that require proactive management to phase out the taxon or replace it with one or more other taxa. The proactive management may not necessarily include managing a population in the EAZA region (e.g., it can involve activities by EAZA staff or TAG members to help manage an *ex situ* population/programme in a range state). EAZA can be the lead partner in the *ex situ* programme or can be a participating partner in a collaboration led by others (e.g., range state governments, NGOs, other zoo associations, etc.).

**MON-T REPLw** - The TAG will monitor the replacement of this taxon with one or more other taxa.

All forms/templates are available to download on the EAZA Member Area.



**MON-T Phase out** – The TAG will monitor the recommended elimination of this taxon from EAZA institutions.

**MON-T DNO** – The taxon is currently not present in EAZA institutions, and it is not recommended that it be obtained in EAZA institutions. Its presence/absence will be monitored by the TAG.

**MON-T**– The taxon is present in EAZA institutions and while there is no specific role for the taxon (with associated management), there is also no active recommendation to replace or phase out the taxon. The TAG will monitor the numbers of this taxon in EAZA institutions.

#### **Other term definitions in the summary tables:**

**Increase, decrease, maintain** – what would be the desired population trend for the *ex situ* populations in EAZA, following the TAG mission, vision, and individual EEP management plans.

#### **Tables colour coding:**

**Green rows** – Taxa managed under the EEP framework (dark green for multi taxa EEPs)

**Grey rows** – Taxa not proactively managed in EAZA institution (MON-Ts)

**Blue rows** – Taxa not kept in EAZA member institutions, but kept *ex situ* elsewhere

**Orange rows** – Taxa currently not kept *ex situ* anywhere worldwide (to the RSP contributors' knowledge, current as of 2025), but for which *ex situ* management is considered/proposed by conservation NGOs/individuals

Example of summary table(s)

The following two tables (see next page) give a concise overview of the outcomes of the RSP workshop, including some crucial background information. Please read the individual Species Sheets for more detailed information.

All forms/templates are available to download on the EAZA Member Area.



*Summary table of taxa assessed in detail (with species sheet)*

The following table gives an overview of the RSP decisions/recommendations for all taxa assessed in detail during this edition of the RSP workshop. The ones managed under the EEP structure are highlighted first.

Common name ( <i>Scientific name</i> )	IUCN Red List Status	EAZA Population + desired trend	Direct Conservation role(s) recommended for <i>ex situ</i> management	Indirect Conservation role(s) recommended for <i>ex situ</i> management	Non-conservation role(s) recommended for <i>ex situ</i> management	Support activities	RSP Category
Black-and-white ruffed lemur ( <i>Varecia variegata</i> )	CR	147.113.4 (264) Maintain	- Insurance population - Ex situ research/training	- Fundraising			<b>EEP</b>  (Black-and-white ruffed lemur EEP)
Black-and-white belted ruffed lemur ( <i>Varecia variegata subcincta</i> )	CR	55.47.0 (102) Maintain	- Insurance population - Ex situ research/training	- Fundraising			
Red ruffed lemur ( <i>Varecia rubra</i> )	CR	(364) 210.154.0 Maintain	- Insurance population - Source for population restauration - Ex situ research/training	- Fundraising		- Biological education	<b>EEP</b>
Ring-tailed lemur ( <i>Lemur catta</i> )	EN	1184.897.114 (2195) Decrease	- Insurance population - Ex situ research/training	- Fundraising			<b>EEP</b>
Southern galago ( <i>Galago moholi</i> )	LC	20.14.8 (42) Maintain				*- Taxonomic diversity *- Education *- Husbandry research and knowledge	<b>MON-T</b>
Northern greater galago ( <i>Otolemur garnettii</i> )	LC	18.5.0 (23) Maintain				*- Taxonomic diversity *- Education *- Husbandry research and knowledge	<b>MON-T</b>

\*see respective Species Sheet

All forms/templates are available to download on the EAZA Member Area.



*Summary of taxa not assessed in detail (without species sheet) and non-managed*

The following table gives an overview of the recommendations for some of the non-managed species under the remit of this TAG. This includes species discussed in detail during the first edition RSP workshop which did not require a detailed re-assessment during the second edition, as well as further species that have not been discussed but for which a TAG recommendation is relevant. The table was updated during the workshop, following the TAG's vision.

Any species not otherwise listed receives the category of MON-T by default.

<b>Common name (<i>Scientific name</i>)</b>	<b>IUCN Red List Status</b>	<b>EAZA Population + desired trend</b>	<b>RSP Category</b>
Grey-headed lemur ( <i>Eulemur cinereiceps</i> )	CR	6.7.0 (13)  <b>Maintain</b>	MON-T
Collared brown lemur ( <i>Eulemur collaris</i> )	EN	5.5.0 (10)  <b>Decrease</b>	MON-T REPLw XX EEP species
Brown lemur ( <i>Eulemur fulvus</i> ) (including animals formerly identified as <i>mayottensis</i> )	VU	33.19.0 (52)  <b>Decrease</b>	MON-T REPLw XX EEP species
Sanford's brown lemur ( <i>Eulemur sanfordi</i> )	EN	(0)	MON-T DNO
Milne-Edwards' sifaka ( <i>Propithecus edwardsi</i> )	EN	(0)	MON-T DNO

#### **4. Species assessment (species assessment sheets)**

The species assessment sheets that are prepared ahead of the RSP workshop and that are finetuned and finalised during and after the RSP workshop should be included in this section. There are different templates available, for existing EEP species and other species.

Please refer to [Appendix 2b: Species Assessment Sheet](#) for Species Assessment Sheet templates including examples.

#### **5. References**

This is a list of all references used from the different parts in the report.

All forms/templates are available to download on the EAZA Member Area.



## 6. Appendices

The following additional information should be included in appendices:

- List of participants (both workshop participants as well as in situ specialists that completed the pre-workshop ex situ role questionnaire) and List of TAG members and their institutions, with contact information of the TAG Chair and Vice chair(s)
- Others (e.g. TAG Action plan)

All forms/templates are available to download on the EAZA Member Area.



## Appendix 2b: Species Assessment Sheet

The Species Assessment Sheets (often simply referred to as “species sheets”) provide a profile overview of each species discussed during the RSP workshop, one for existing EEP species, the other for non-EEP species and/or newly selected species.

They include:

- The species *in situ* threat status (mostly from the [IUCN Red List](#)).
- Relevant (for the purpose of the RSP) taxonomy information.
- Existing *ex situ* conservation recommendations/plans from EAZA external entities.
- A reflection of the roles for *ex situ* management in EAZA and/or Support activities for re-assessed species
- A review of potential roles/support activities for non EEP species and/or newly selected species (inclusion of role table), and a decision statement.
- The species *ex situ* demographic and genetic status.
- A management plan in case of established EEPs.

### Roles for *ex situ* management in EAZA

Simply referred as “Roles” in each EEP Species Sheet, these are the main reason for a taxon to be managed under the EAZA *Ex situ* Programme (EEP) framework. During the workshop, RSP participants assess the feasibility, benefit for conservation, and potential risks of delivering these roles. In the long-term, EEP Coordinators proactively follow up on this, making sure that the roles are being fulfilled. All roles previously selected have been reviewed, and (when appropriate) reclassified. More detailed information about the roles can be found [here](#).

### Support activities

Support activities are identified actions and/or opportunities for EEP participants to contribute to the taxa conservation and/or available knowledge. Unlike roles, support activities are not necessarily specific and/or measurable, and the EEP is only expected to react to them opportunistically and/or upon request. Some previous selected roles have been reassessed and re-categorized as support activities. More detailed information about support activities can be found [here](#).

All forms/templates are available to download on the EAZA Member Area.



Example Species sheet for existing EEP:

## Red-ruffed Lemur EEP

*Varecia rubra*

### Status in the wild

#### Taxonomy

Monotypic.

#### Status

**Critically Endangered**, Decreasing ([IUCN Red List, 2018](#))

#### Ex situ conservation mandates (external)

[Made up Madagascar mandate 2021](#)



### Roles

#### Direct conservation roles

**Insurance Population:** The EAZA ex situ population acts as an insurance population for the species, which means that the population will be maintained in the long-term to preserve conservation options for the future, in particular providing individuals to reinforce wild populations in Madagascar from a demographic and/or genetic perspective. Collaboration with AZA is crucial for the long-term genetic health of the EAZA population.

**Source for Population restoration:** The ex situ population is ready to provide individuals for reintroduction in the Farankaraina Forest (MG) under the collaborative efforts of the EAZA Prosimian TAG, the Malagasy authorities, and the Malagasy local partners [IMPACT Madagascar](#) and [Antongil](#). The appropriate facilities are built, and the first reintroductions are expected in the coming months (2026).

**Ex situ research/training:** EAZA knowledge on release methods and husbandry expertise should continue to be shared with institutions in Madagascar to further improve husbandry/breeding experience in-range. There is also valuable experience to be obtained on the adaptability of animals when transferred from Europe to Madagascar, which is very important given the perspective of reintroduction. Furthermore, it would be valuable to keep studying the management of larger groups composed of multiple adult individuals. The use of BPGs will help to fulfil this role.



### Indirect conservation roles

**Fundraising:** The fact that the species is highly charismatic and active makes it easier for EEP participants to capture the visitor's attention to collect funds for supporting in situ projects (the EAZA Prosimian TAG In situ Conservation Compendium can be found [here](#)). EEP participants are encouraged to provide financial support to the Red Ruffed Lemur Reintroduction Project, a project focusing on reintroducing the species into the Farankaraina Forest.

### Support activities

**Biological Education:** The fact that the species is highly charismatic and active makes it easier for EEP participants to capture visitor's attention and educate about the species' unique biology. This includes ecology, behaviour, and unique evolutionary traits.

#### Additional notes from the RSP workshop:

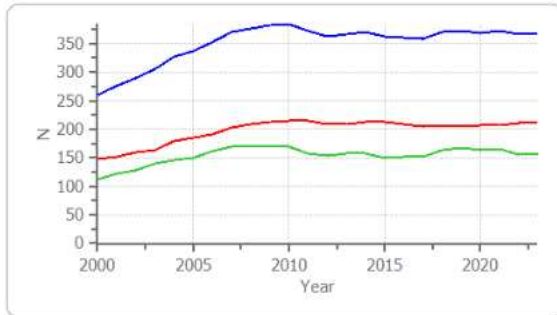
- Biological Education as previously a role, but was re-categorized as support activities
- (...)

## Status of the EEP

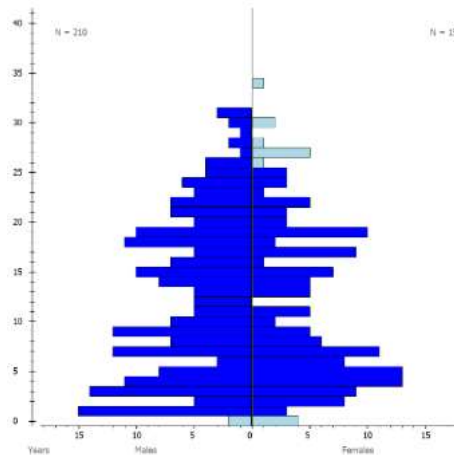
There has been no major change in the population since the analysis made in 2018. Numbers are relatively similar, the population is stable. There is still a skewed sex ratio towards males. The current genetic diversity is rather low, with 86%, a mean kinship of 0.14 and a mean inbreeding of 0.142, which means that individuals in the population are related to a level a bit higher of half-siblings.

Population size (as of XXXX)	XX.XX.XX (XXX) at XX institutions
Known pedigree	XX%
Genetic Diversity (GD)	XX.X%
Potential GD	XX.X%
Mean Kinship	0.XXX
Inbreeding coefficient	0.XX

All forms/templates are available to download on the EAZA Member Area.



Age distribution of the EEP as of [Month/Year]



Census of the EEP population size

### Other Regions

Population size world wide (as of XXXX):

Population in AZA: XXXX

Population in ZAA: XXXX

Etc..

### Management Plan

[The complete Long Term Management Plan (LTMP) for this species can be consulted in the EAZA member area ([here](#)).

Goals for the population:

- Maintain the population at its current size of 370 individuals.
- Minimize the loss of genetic diversity by strategically managing animals by mean kinship and trying to import new genes within the EEP population.
- Develop collaboration with AZA and Malagasy partners to maintain a global demographically and genetically healthy *ex situ* population.

### Calls for Action

- All institutions using contraception are asked to collaborate and share data with the EAZA Reproductive Management Group and as such contribute to the database detailing the efficacy, effects and reversibility of different contraceptive methods.
- Institutions are encouraged to support the activities of the Red Ruffed Lemur Reintroduction Project and to educate visitors about the species.

All forms/templates are available to download on the EAZA Member Area.



- In case of euthanasia, unexpected death or planned castration of males, please contact the team of the interdisciplinary project 'The Battle of the Sex Chromosomes: Consequences for Spermatogenesis and Reproduction in Primates' so they can secure samples from the individual.

All forms/templates are available to download on the EAZA Member Area.

Example sheet for non EEP and/or newly selected species

Southern Galago MON-T

*Galago moholi*

### Status in the wild

#### Taxonomy

[Taxonomy summary]

#### Status

[**RL Status**], [RL trend] (IUCN Red List [RL date])

#### *Ex situ* conservation mandates (external)

[add info APC]

### Potential roles

[Delete when not applicable]

### **Additional notes from the RSP workshop:**

[Bullets if applicable]

### Decision statement

[relevant if previously MON-T]

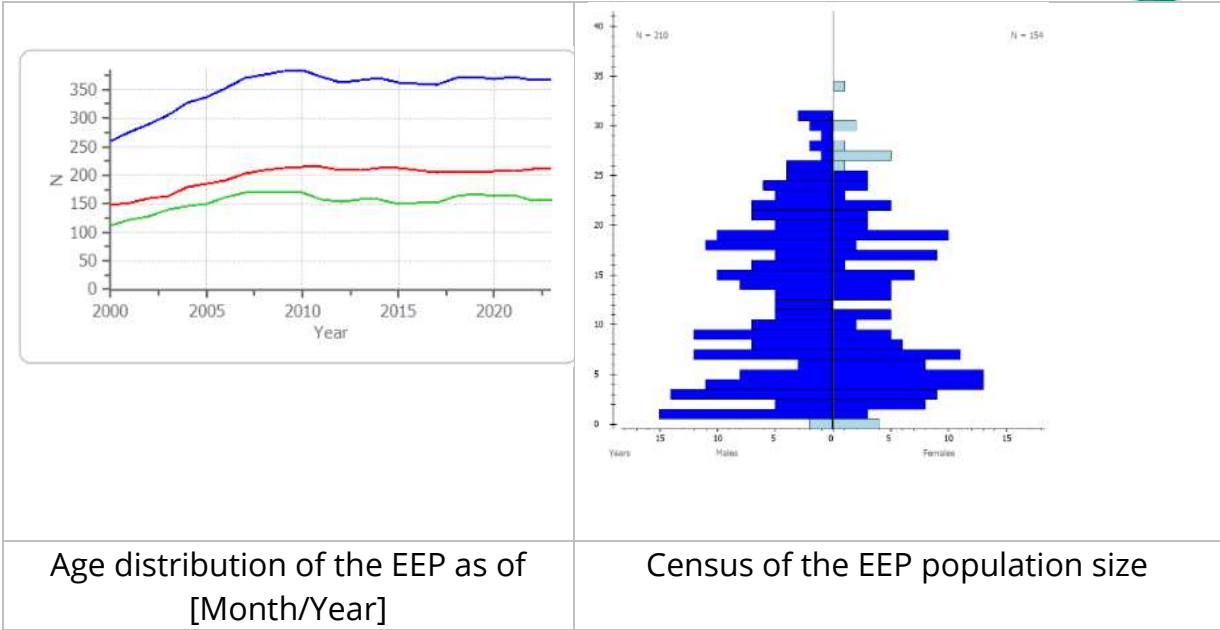
### *Ex situ* status

[Summary (if necessary)]

EAZA Population size (as of XXXX)  
XX.XX.XX (XXX) at XX institutions



All forms/templates are available to download on the EAZA Member Area.



**Other Regions**

[Summary]

All forms/templates are available to download on the EAZA Member Area.



Workshop assessment of roles for *ex situ* management in EAZA

An overview of example roles and their definition was provided to all RSP workshop participants, and can be found [here](#).

**Conservation roles** for *ex situ* management

Direct Role(s)	Programme characteristics required	Benefit	Feasibility	Risk	Recommended? <sup>1</sup>	Contribution? <sup>2</sup>	Notes
Indirect Role(s)	Programme characteristics required	Benefit	Feasibility	Risk	Recommended? <sup>1</sup>	Contribution? <sup>2</sup>	Notes

<sup>1</sup> Role recommended by TAG?

<sup>2</sup> Will EAZA contribute to deliver this role?

**Non-conservation roles** for *ex situ* management in EAZA

Other Role(s)	Programme characteristics required	Benefit to EAZA comm.	Feasibility in/by EAZA comm.	Risk for/within EAZA	Role recommended?	Notes



## Appendix 2c Standard RSP role descriptions

An important part of the Regional Species Planning process is defining the role(s) for *ex situ* management in EAZA (if any). This appendix provides an overview of RSP role descriptions for direct conservation, indirect conservation and non-conservation roles.

### Direct Conservation Roles for *Ex situ* Management

*Descriptions of these roles are based on a combination of the role descriptions in the [IUCN SSC Guidelines on the Use of Ex situ Management for Species Conservation](#) and those in Appendix I of the [Amphibian Ark Conservation Needs Assessment Process](#).*

#### **Ark**

Maintenance of a long-term *ex situ* population after extinction of all known wild populations and as a preparation for reintroduction or assisted colonization if and when feasible.

#### **Rescue (temporary or long term)**

A species that is in imminent danger of extinction (locally or globally) and requires *ex situ* management, as part of an integrated programme, to ensure its survival. The species may be in imminent danger because the threats cannot/will not be reversed in time to prevent likely species extinction, or the threats have no current remedy. The rescue may need to be long-term or temporary (e.g., to protect from catastrophes or predicted imminent threats that are limited in time, like extreme weather, disease, oil spill).

#### **Demographic manipulation**

Improving a demographic rate (survival or reproduction) or status (e.g., skewed sex ratio), often of a particular age, sex, or life stage. For example, head-start programmes that remove individuals from the wild to reduce high mortality during a specific life stage and then subsequently return them to the wild.

#### **Population restoration**

Source for population restoration, either to re-establish the species to part of its former range from which it has been extirpated, or to reinforce/supplement an existing population (e.g., for demographic, behavioural or genetic purposes).



### **Ecological replacement**

Re-establish a lost ecological function and/or modify habitats. This may involve species that are not themselves threatened but that contribute to the conservation of other taxa through their ecological role.

### **Assisted colonization**

Introduce the species outside of its indigenous range to avoid extinction.

### **Insurance population**

Maintaining a long-term viable *ex situ* population of the species to prevent predicted local, regional or global species extinction and preserve options for future conservation strategies. These are typically species that are threatened and for which it is unsure whether *in situ* threat mitigation will have the sufficient effect in a sufficient timeframe to prevent the extinction of the species or to prevent a dramatic decline in the numbers, populations and/or genetic diversity of the species. An *ex situ* population may be desired as an insurance population from which individuals can be extracted for genetic and/or demographic supplementation or other conservation translocations as required, but these are not yet actively planned in the foreseeable future.

### ***Ex situ* research and/or training**

*Ex situ* populations that are used for research and/or training that will directly benefit conservation of the species, or a similar species, in the wild (e.g., monitoring methods, life history information, nutritional requirements, disease transmission/ treatment). The research/training addresses specific questions essential for success of the overall conservation strategy for the species. This can include non-threatened species serving as a model for more threatened species or establishing *ex situ* populations of a threatened species to gain important species-specific husbandry and breeding expertise that is likely to be needed in the future to conserve the species.

### **Conservation Education**

The *ex situ* management forms the basis for an education and awareness programme that addresses specific threats or constraints to the conservation of the species or its habitat. The education addresses specific human behavioural changes that are essential for the success, and an integral part of, the overall conservation strategy for the species. This primarily involves *ex situ* locations visited by the intended human audience.

All forms/templates are available to download on the EAZA Member Area.



## Indirect Conservation Roles for *Ex situ* Management

**These are situations in which the zoo community can contribute to conservation by:**

- a. making available its expertise, knowledge, materials, staff, fund raising, etc. to help implement *in situ* conservation actions, and/or**
- b. carrying out general awareness and conservation education activities aimed at the zoo visiting public**

**Indirect conservation contributions can be made for a species regardless of whether or not it is held in captivity.**

Examples of indirect conservation roles include:

- a. Providing knowledge, experience or training to build capacity for veterinary care or handling of individuals in the field (e.g., radio collar application, transport etc.) or in the context of law enforcement (e.g., rescue centres, human wildlife conflicts etc.).
- b. Making available existing zoo education materials or education/behaviour change expertise to teams developing awareness programmes for local communities *in situ*.
- c. Carrying out education and awareness about the status of and threats to the species. Increasing interest in the species and its habitat/ecosystem.
- d. Networking and lobbying to influence opinions, legislation processes, etc.
- e. Small scale fundraising to contribute to high priority *in situ* projects or IUCN SSC Specialist Group activities.

## Non-Conservation Roles for *Ex situ* Management

Questions that can be asked to investigate non-conservation roles for *ex situ* management in zoos:

- a. Is this species required/suited to let holders gain experience in husbandry before taking on more difficult species? Specify which type of experience.
- b. Is the species important for research that is not conservation related (basic and applied research)? Specify the research fields.
- c. Is the species particularly valuable for non-conservation education (e.g., specific aspects of the species biology)? Specify the education topics.

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- d. Does the species have an above average evolutionary distinctiveness score?
- e. Is the species colourful, distinctive, diurnal, active or particularly attractive as a zoo exhibit?
- f. Does the taxon have a special human cultural value (e.g., as a national or regional symbol, in a historic context, featuring in traditional stories etc.) or economic value (e.g., traditional medicine, tourism, hunting) within its natural range or in a wider global context, and does this give the species a particular value for education or exhibit?

### Support activity

Support activities are opportunities to which the EEP is expected (by the TAG) to react when they arise. The EEP coordinator could for example be expected to:

- do advocacy, if there is a need and opportunity to do so
- to facilitate relevant research, if approached by researchers
- to share relevant knowledge (Capacity building), if requested by conservation organisations
- In case of the countless conservation education messages that our species can be used for; this is for EEP participants to be aware of the opportunity to do conservation education with the species on specific topics, if opportune (fitting within the education strategy of their institution)

Questions that can be asked to investigate support activity for *ex situ* management in zoos:

- G. Is this actionable/measurable role or more ad hoc opportunity for holders to contribute? Specify.



## Determining characteristics and resources of the *ex situ* population needed to fulfil the identified role(s)

### 1. General characteristics

- Does the programme likely need to be long, medium or short-term?
- Is a release phase already planned for the foreseeable future?
- Is proximity to the natural habitat crucial or beneficial?
- Do the *ex situ* activities involve whole living organisms and/or live bio-samples?
- What level of human proximity or interaction is desirable?

### 2. Founders and population size

- Is the founder base of the current *ex situ* population likely already sufficient or are more founders required?
- Can additional founders or unrelated individuals be (legally and logistically) obtained? From wild? Other zoo regions? Other *ex situ* collections?
- Can the population be kept at, or grown to, the required population size?

### 3. Genetic and demographic management

- Is the taxonomy clear *in situ* and *ex situ*? What is the taxonomic scope of the *ex situ* programme?
- Will reproduction be required in the *ex situ* programme?
- Is retention of a high proportion of gene diversity of high, medium or low importance?
- Is control over the population size/growth and age/sex structure of high, medium or low importance?
- Is the species best managed at an individual or group level?
- Will breeding and transfer recommendations be necessary? If yes, how important is it that these are mandatory?
- How likely are ownership and access issues expected to impede success of the programme?

### 4. Location and scale

- What are the geographic location and scale? Is there range country involvement?
- Do (some) non-zoo association members or non-zoo institutions play a role? If yes, what level of commitment is required from them?
- If work is required across regions, is there a need for a formal framework for this or is more informal collaboration sufficient?

### 5. Catastrophes

- Are there any biosecurity needs?
- Are there specific requirements to reduce impact of other potential catastrophes?

6. Are **research** or **training** setup/equipment needed?

7. Are particular **welfare** issues to be addressed?

#### **Feasibility: High / Medium / Low**

*(existing ex situ population, husbandry challenges, technical or logistical challenges, availability of skilled staff, availability of sufficient financial and other resources, ...)*

#### **Risks: High / Medium / Low**

*(sensitivity to catastrophes, consequences for wild population, occupying ex situ space for other species that need it more, human health and safety risks, political risks, risks for social or public conflicts, ...)*

All forms/templates are available to download on the EAZA Member Area.



## Selecting from potential *ex situ* roles identified

Reaching consensus whether or not to go ahead with *ex situ* activities with these roles:

- a. **For conservation roles:** Considering
  - the relative importance/weight of the potential conservation benefit (also compared to alternative conservation actions or inaction) vs. the likelihood of success, costs and risks,
  - the general recommendations from the RSP workshop and other documents like a global collection assessmentis/are there (a) conservation role(s) for *ex situ* management of this taxon within EAZA (if any)?
  
- b. **For non-conservation roles:** Considering the relative importance/weight of the benefit of the species to the zoo community (unrelated to conservation) vs. the likelihood of success, costs and risks – ESPECIALLY the cost of occupying enclosure space for species under the TAG umbrella, or for other taxa with similar requirements, is/are there (a) non-conservation role(s) for *ex situ* management of this taxon within EAZA (if any)?

→ **Consensus on final role(s) for EEP (if any)**



## Appendix 2d: Investigating potential *ex situ* Conservation Roles

Ahead of the EAZA RSP workshop, it is important to gather input from *in situ* experts, like for example IUCN SSC Specialist Groups that will help determine whether an *ex situ* conservation role might apply to certain taxa. As it will not be feasible to get all experts present at the workshop and to prepare the workshop ahead of time, it will be important to survey the *in situ* experts to get important information on the table. This appendix provides the standard set of questions that are relevant to get the *in situ* expertise document for. Please note that throughout the below the term “zoo” refers to the “zoo and aquarium community”.

This document builds on the roles as described in Appendix 1C. The EAZA Executive Office has a template questionnaire available that includes more detail than the below.

The following information is relevant to ask:

For threatened species

(for this project, defined as EW, CR, EN, VU, NT on the global IUCN Red List)

**Direct conservation** (i.e., the individuals in the *ex situ* population play a conservation role)

- 1. Is there an existing conservation strategy/action plan for this species that calls for some form of *ex situ* management in support of conservation?**
- 2. Do you feel (and/or does an existing strategy/plan state) that *ex situ* management with one or more direct conservation roles would be required for this species – and if so, which roles? (One *ex situ* programme may serve several conservation roles – either simultaneously or consecutively)**
  - a. If yes, do you feel that the zoo community should help with:**
    - i. Implementing an *ex situ* programme located elsewhere than on zoo grounds (e.g., in a range country facility or another non-zoo environment)
  - b. And/or:**
    - i. Implementing an *ex situ* programme in professionally managed zoos (this can range from one, to a few zoos, to a large cooperative programme regionally or globally)

All forms/templates are available to download on the EAZA Member Area.



**Indirect conservation** (i.e., ways in which the expertise, knowledge, materials, staff, fund raising etc. present in the zoo community can contribute to *in situ* conservation activities). Please note that a threatened species may be eligible for indirect conservation support from the zoo community even if it is currently not held by zoos.

3. **Do you see a specific need for expertise, knowledge, materials, staff or other in-kind support from the zoo community to help implement a particular *in situ* conservation action, or address a particular *in situ* problem?**
4. **Is there a high priority *in situ* project for which small scale funding from the zoo community could make a lot of difference for the conservation of the species (that might perhaps have difficulty attracting funds from other sources)?**
5. **Are there particular messages that you feel would be good for zoos to include in general conservation educational activities for the zoo visitors?**

#### **Non-conservation roles**

6. **Do you see any important non-conservation roles for this species?**

**PLEASE RATE the conservation benefits of any conservation roles chosen as well as the benefit to the zoo community of any non-conservation roles chosen?**

#### **For non-threatened species**

7. **Do you have reason to believe that this taxon, which is currently not listed as either EW, CR, EN, VU or NT, might recently have run into significant trouble, such that its current threat status might be more severe than is evident from its current IUCN Red List category? If yes, please specify and answer questions 1-5 above.**
8. **Do you think there is a need for this non-threatened species to function as a model, through *ex situ* activities, for a threatened species, for example to gain husbandry experience, for conservation-targeted research, conservation-targeted education, or “ecological replacement”?**
9. **Do you see any important non-conservation roles for this species?**

All forms/templates are available to download on the EAZA Member Area.



**PLEASE RATE the conservation benefits of any conservation roles chosen as well as the benefit to the zoo community of any non-conservation roles chosen.**



## Appendix 3: Template for proposing a new EEP

*TAGs can use this Template for proposing a new EEP to the EEP Committee. As per default these applications follow from the RSP publication process, and the Species Assessment Sheet should be sent along with this template. In exceptional cases new EEPs may also be proposed in between RSP editions. A separate Species Assessment Sheet should be completed if an EEP is being applied for in between RSP editions. Note that not all sections below may be relevant to each programme. Also note that 'species' represents any taxonomic unit the TAG has chosen as the unit of management in an EEP.*

### EEP Proposal for

**Common Species Name:**

**Scientific Species Name:**

### Prepared by

Name(s): TAG

Year:

#### 1. Contact information

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#### Contact details of proposed EEP Coordinator

Name:

Institution:

Email:

#### 2. Taxonomy information

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**Taxonomy of the species** (*indicate which taxa are included in this programme and why, and give an indication of the degree of confidence in the taxonomic identification of the individuals in the EEP population*)

#### 3. Identified roles

---

**Identified role(s) description** (*copy from the Species Assessment Sheet in RSP*)



#### 4. Programme participants and governance

**EAZA institutional scope** *(As a default, participation in EEPs is obligatory for EAZA Members. If you wish for an exemption, identify which institution(s) holding this species is/are not part of the EEP and explain the underlying reasons.)*

**Non-EAZA holding institutional scope** *Select one or more of the options below.*

- EAZA population/community is the dominating driver of the EEP and any non-EAZA Members will occasionally join and are not integral to the structure of the EEP.*
- In addition to EAZA, there are other structural/equal drivers of the EEP (e.g., World Pheasant Association, ...). Please describe.*
- A larger initiative exists and the EAZA population is a small part of this (e.g., GSMP, ...). Please describe.*

Additional information:

**Essential non-EAZA partners not holding animals** *(List the organisations, define their role, and how they will work with the EEP).*

**Members of the EEP core group (Species Committee + non-voting members)**

- By default, EEPs have a Species Committee (a democratically elected representation of the holders) as part of their EEP core group (information on the Species Committee and its associated default decision making process can be found in the Population Management Manual). If that will not be the case for this EEP, explain why and define the composition, structure and decision-making process for the EEP core group.*
- List the EEP core group members (names and institutions) (if already known): Species Committee members, advisors, others.*

**Collaboration with EAZA Working Groups and Committees** *(Explain any current and/or future proposed links to existing EAZA groups and committees, such as the Animal Training Working Group, Biobank Working Group, EAZA Reproductive Management Group (EAZA RMG), EAZA Population Management Advisory Group*

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*(EPMAG), EAZA Conservation Education Committee, EAZA Nutrition Working Group, EAZA Research Committee, Conservation Translocations Group, Transport Working Group, EAZA Veterinary Committee, EAZA Conservation Committee, Animal Welfare Working Group, Imported Deforestation and Sustainable Agriculture Working Group).*

## 5. Programme characteristics

---

The detailed programme characteristics, goals, objectives and management strategies to fulfil the roles and goals of the EEP will be developed at a later stage as part of a Long-Term Management Plan (LTMP). The questions below are intended to help paint a rough view of what is currently intended/expected for the general EEP programme characteristics.

- *If there is a recent/active Long-term Management Plan for this species, list the demographic, genetic and other goals determined (if they still apply post RSP workshop).*
- *What is the anticipated duration of the programme?*
- *What is the anticipated likelihood and time scale of the use of the EEP population for restoration in the wild (reintroduction, reinforcement, etc.)?*
- *Are some or all the individuals within this EEP intended to be held in specialist ex situ centres in the species' native range? Specify.*
- *Is it expected to be necessary that the whole population, or a certain proportion thereof, will need to be held off exhibit in order to fulfil the roles of the programme? If yes, please explain. (this question does not refer to the temporary housing of individuals off exhibit for space reasons)*
- *Does a part or the whole of the EEP population need to be held in bio-secure facilities? And/or are there known diseases that have an above average effect on fulfilling the roles of the EEP?*



- *What is the expected estimated number of individuals and institutions required to fulfil the selected roles? (this question will be answered in detail during the LTMP session for the taxon, but if some indication of scale is clear already, this should be stated here)*
- *Is this EEP intended to include rearing of wild eggs/young (i.e. head-starting)?*
- *Is this EEP intended to include ex situ breeding?*
- *Is there likely sufficient expertise for this, or a model, taxon to achieve the roles of the programme and provide conditions for good welfare? Please indicate if Best Practice Guidelines already exist and if yes, include publication date.*
- *Will (non-)breeding and transfer recommendations be issued? If yes, with what frequency? (naturally problems will need to be solved throughout the year, but with what frequency will recommendations be issued for the whole population at once)*
- *Do you anticipate that the EEP population will be (largely) closed or will there be regular planned additions of individuals? In case of the latter, will this be for genetic and/or demographic reasons and what will be the source (other ex situ sources and/or from the wild)?*
- *Do you expect genetic and demographic management in this EEP to be individual and/or group-based?*
- *Do you expect genetic management in this EEP to be based on pedigree analysis, group history analysis, and/or molecular genetics?*
- *Do you anticipate, or proactively plan for, biobanking and/or assisted reproduction to be key components of this programme?*

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- *Do you anticipate certain national or international legislation to form a particular hindrance (more than average) to achieving the roles of your EEP (e.g., CITES, BALAI, governmental ownership, etc.). If so, explain how.*
- *Are there any other issues/plans related to in situ conservation support that you feel should be mentioned and are not evident from the role description of the EEP?*
- *Is there a research component/aspect to the EEP that is expected to have important consequences for the design of the EEP programme (e.g. housing and husbandry of a significant proportion of the population, etc.)? If yes, explain.*
- *Do you anticipate there to be any sizeable political, social, or public conflicts of interest related to the EEP programme and how do you plan to deal with them?*
- *Any important additional programme characteristics that you would like to mention?*

## 6. References (if any)

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## Appendix 4: EAZA Best Practice Guidelines template

### Approval procedure

A TAG (EEP) compiles and endorses EAZA Best Practice Guidelines using this template (for EEPs the respective Species Committee approval needs to be sought). Throughout this process, authors should **strive for documenting true best practice, as opposed to merely commonly practice**, aiming for recommendations that are supported by scientific evidence or established professional consensus wherever possible. Authors are encouraged to seek expert advice from the relevant working groups / Committees in the process of developing BPGs.

TAG approved Best Practice Guidelines must be sent to EAZA Executive Office who will seek EEP Committee approval based on the publication procedure and process. After their approval, the TAG will be informed and the EAZA Best Practice Guidelines will be made publicly available through the EAZA website and receive a DOI. For more information on the rules and status of BPGs please see [section 2.3 EAZA Best Practice Guidelines](#).

### Content

EAZA Best Practice Guidelines should include the following sections and chapters:

#### **Cover / Title page**

The cover and title page should include the following information:

- Name of the TAG
- Applicable taxa or common name and scientific name of the species
- Edition
- Publication date
- Editor(s) and editor logo(s)
- EAZA logo
- EAZA Best Practice Guidelines Disclaimer (example below)
- Citation

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Because the technical information provided in the EAZA Best Practice Guidelines can easily be misread or misinterpreted unless properly analysed, EAZA strongly recommends that users of this information consult with the editors in all matters related to data analysis and interpretation.

## **Preamble**

The following preamble should be added to EAZA Best Practice Guidelines:

Right from the very beginning it has been the concern of EAZA and the EEPs to encourage and promote the highest possible standards for husbandry of zoo and aquarium animals. For this reason, quite early on, EAZA developed the “EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and Aquariums (2024)”. These standards lay down general principles of animal keeping, to which the members of EAZA feel themselves committed. Above and beyond this, some countries have defined regulatory minimum standards for the keeping of individual species regarding the size and furnishings of enclosures etc., which, according to the opinion of the authors, should definitely be fulfilled before allowing such animals to be kept within the area of the jurisdiction of those countries. These minimum standards are intended to determine the borderline of acceptable animal welfare. It is not permitted to fall short of these standards. How difficult it is to determine the standards, however, can be seen in the fact that minimum standards vary from country to country.

Above and beyond this, specialists of the EEPs and TAGs have undertaken the considerable task of laying down guidelines for keeping individual animal species. Whilst some aspects of husbandry reported in the guidelines will define minimum standards, in general, these guidelines are not to be understood as minimum requirements; they represent best practice. As such the EAZA Best Practice Guidelines for keeping animals intend rather to describe the desirable design of enclosures and prerequisites for animal keeping that are, according to the present state of knowledge, considered as being optimal for each species. They intend above all to indicate how enclosures should be designed and what conditions should be fulfilled for the optimal care of individual species.

## **Provide a summary**

**Recommended:** To help and prepare readers, it is recommended to provide a short summary (maximum of 1 page) of the most important husbandry aspects that are described in the Guidelines. For instance, you can highlight aspects that have a larger influence on husbandry than may be expected or sections you want readers to pay extra attention to.

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### Section 1: Biology and field data\*

\* **Not obligatory.** Inclusion of this section is optional; only a brief introductory species profile is required, and references to recommended reading.

*Relevant biology or natural history information should be integrated in the husbandry and management sections as needed to support understanding of care recommendations.*

#### If included, this section may cover:

- Taxonomy
- Morphology
- Physiology and Longevity
- Conservation status / Zoogeography / Ecology
- Diet and feeding behaviour
- Reproduction
- Behaviour

### Section 2: Management in Zoos and Aquariums

Section 2 provides a brief, yet comprehensive, overview of general husbandry practices with particular attention to species specific welfare considerations. It covers all aspects of animal husbandry, though it should be noted that only specific veterinary information, relevant to everyday husbandry, is included. The guidelines are concerned with the practical rather than medical issues of animal management. Thus, whilst details of handling and restraint during a medical procedure may be provided, details of the treatment itself, of drugs used or surgical procedure will not be provided. Typical species specific veterinary complaints should be listed with methods of avoiding/dealing with the complaints explained.

Include here all essential biology and natural history information required to understand or justify specific husbandry and management approaches. Do not duplicate material unnecessarily from Section 1.

Indicate for each recommendation whether it is based on published science, established professional practice, or unvalidated experience. Use references wherever possible.

Include validated welfare tools (e.g., body condition score chart, ethogram, activity budget), as applicable.

For each recommendation, authors should indicate the source or strength of the information by making it clear within the text itself.

This can be achieved by:

- **Using standard in-text citations** for published scientific literature (e.g. “Smith *et al.*, 2019”) (see references at the end of the template)
- **Explicitly stating “established professional practice” or “widely accepted husbandry practice”** for recommendations not supported by direct literature, e.g. “Based on established professional practice in EAZA institutions...”

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- **Marking anecdotal or unvalidated experience clearly**, e.g. “Based on anecdotal reports from keepers at Institution X...” or “Personal observation (A. Author, pers. comm.)”.

The goal is that any reader can easily distinguish whether a recommendation is evidence-based, consensus-based, or anecdotal.

## 2.1 Enclosure

Section 2.1 provides a general guide as to what has been used and found to be appropriate for a particular species without suggesting that these are the only suitable options. Describe the general enclosure set-up and key features supporting animal welfare.

- **Boundaries:**  
Primary barriers, partitions, adjacent enclosure boundaries, holding pens, and public barriers. [If applicable: specify electric barrier standards by taxon.]
- **Substrate:**  
Indoor and outdoor floor materials (e.g. natural vegetation, sand, gravel, concrete, bedding, peat, etc.), and any unsuitable substrates. [If aquatic/vivarium: describe base substrate as relevant.]
- **Furnishings:**  
Major features such as climbing structures, hiding places, shelter, ponds, water/feeding troughs, dens/nests, shade, and enrichment fixtures.
- **Maintenance:**  
Key considerations for cleaning, drainage, service corridors, keeper access, and any furnishings or design features that facilitate maintenance.  
[For aquariums/vivaria: include maintenance of life support systems.]

## 2.2 Environment

Both the indoor and the outdoor environment are considered. Appropriate methods of heating, lighting and ventilation for indoor quarters, and details of optimum temperatures, light intensity and humidity are suggested. Special husbandry considerations during particularly hot or cold weather, heavy rain, ice or snow, are outlined, taking the different climates in the European region into consideration.

For aquatic species, recommended water quality parameters are listed with ranges (e.g. salinity, temperature, pH, nitrate, carbonate hardness). Where appropriate, recommended life support systems are described. Lighting and photoperiod are also described. Any environmental cues and/or seasonal/reproductive changes (e.g. temperature, photoperiod, salinity) are outlined. Any specific maintenance requirements are also described.

Describe required environmental conditions, adapted to the species’ natural history and welfare needs.

- **Climate Control:**  
Temperature, humidity, lighting, ventilation (indoor and outdoor as needed).

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- **Water Quality [If aquatic species]:**  
Parameters such as salinity, pH, temperature range, nitrate/carbonate hardness; reference any necessary life support systems.
- **Seasonal Considerations:**  
Adaptations for seasonal changes, extreme weather, or natural cycles (e.g. photoperiod adjustments for breeding).
- **Dimensions:** optimum conditions and dimensions for that species, to which individual collections can aspire. It may also be helpful to indicate spatial density (No. individuals/m<sup>2</sup>).

### 2.3 Feeding

As well as outlining basic dietary needs, including supplementary vitamin and mineral requirements, this section considers special dietary requirements for young, breeding, pregnant or lactating individuals, for birds, ectotherms, monotremes, etc. during the egg laying season and for species with specific feeding behaviours. In recent years it has become increasingly obvious that not only what is fed, but also how it is fed, is important in terms of animal health and welfare. Special consideration is accordingly given to “non-nutritional” aspects of the diet and to appropriate methods of feeding. Other factors influencing feeding methods, such as hygiene, practicality and social considerations, are also acknowledged.

Veterinarians and/or nutritionists should be consulted where possible to analyse nutritional quality and quantity of food consumed and wasted.

Individual food items and nutritional content should be specified. Quantity and quality fed per individual is outlined. Where appropriate, this section should include information on browse and forage (suitable plant species). It is appropriate here to mention any diets that have caused problems.

Vitamins, minerals and other supplements should be listed with a source provided for each product.

The use of feeding as a form of environmental enrichment, the texture of food for example or its presentation and any other considerations not directly related to nutritional value need to be outlined. Any particular ‘likes’ of that species should be mentioned as these food types are very useful in administering medication.

- **Diet:**  
Core food items, quantity/quality, supplements (vitamins/minerals), and any foods to avoid. [Reference field diet as relevant.]
- **Special Requirements:**  
[If applicable] Dietary needs for young, breeding, pregnant/lactating, or aged/convalescent animals.
- **Feeding Methods:**  
Frequency, presentation (whole, chopped, enrichment device, etc.), feeding locations (indoors/outdoors), and water provision. Non-nutritional aspects of diet (e.g. variety, foraging, food texture) for welfare.
- **Nutrition Analysis [Optional]:**  
Use of tools like Zootrition© for dietary planning.



## 2.4 Social structure

- This section outlines a suitable social structure with details of intra-specific and inter-specific associations. Data from wild populations describing wild structures should be referred to here (section 1.8).
- **Basic Social Structure:**  
Natural social units (e.g. solitary, pairs, groups), age/sex composition, and successful groupings in captivity.
- **Group Changes:**  
Methods and considerations for introducing/re-introducing animals, managing removals, and single-sex or mixed-species groups.
- **Mixed Species Enclosures [Optional]:**  
Suitable cohabitant species, with advantages/disadvantages and special requirements.

## 2.5 Breeding

Outlines appropriate breeding techniques such as adding new birds to a flock to stimulate breeding displays, removing males from primate groups or changing temperature/photoperiod in aquariums. Where appropriate, artificial breeding techniques (e.g. AI, implants, hormonal stimuli, double clutching) are described.

- **Breeding Strategy:**  
Natural and recommended breeding strategies, including evidence-based interventions.
- **Mating:**  
Introduction and segregation of breeding individuals, sex ratios, courtship behaviours, and modifications to enclosures for breeding.
- **Pregnancy/Egg Laying and Incubation:**  
Physical/behavioural signs, gestation/incubation parameters, nest building, clutch size, artificial techniques (if any).
- **Birth/Hatching:**  
Process, indicators, and management of common complications.
- **Development and Care of Young:**  
Parental care, weaning/fledging, and introduction to conspecifics.
- **Hand-rearing [If applicable]:**  
Guidelines and risks (e.g. imprinting), recommended only when necessary.

## 2.6 Population management

Highlights the **breeding strategy** of the species from a population management point of view (e.g. what is the RSP status and target population, etc.).

## 2.7 Behavioural enrichment

All forms/templates are available to download on the EAZA Member Area.



Lists the variety of means for behavioural enrichment by species specific needs and the physical build of the animals

- **Behavioural Needs:**  
Key species-specific behaviours to encourage/enable, with focus on welfare.
- **Enrichment:**  
Physical, social, sensory, cognitive enrichment appropriate for the species.

### 2.8 Handling

The difficulties associated with identification, sexing, handling, capture, restraint and transportation are examined and ways to facilitate these procedures suggested.

- **Identification and Sexing:**  
Techniques (visual, physical, implant, banding, etc.), age and standardization by taxon.
- **Daily Handling:**  
Routine procedures and necessary precautions.
- **Capture and Restraint:**  
Methods minimizing stress/risk; both physical and chemical, if used.
- **Transport:**  
Suitable transport methods (crates, bags, tanks, etc.), referencing IATA guidelines where appropriate.
- **Safety:**  
Keeper/public safety considerations, escape procedures, and, for venomous/dangerous species, emergency protocols.

### 2.9 Animal Training [If applicable]

This section describes and recommends behaviours to train for the species. This includes behaviours useful for management, day-to-day care, and behaviours useful for cooperation in medical care. Also included in this section are undesired behaviours emitted by the species that have been frequently observed. Specific tools, props, and apparatuses that facilitate training can be described, if applicable. There may also be specific safety considerations, as it pertains to training required for the species. Ethologic/phylogenetic considerations that impact training and behaviour should also be described here.

(See the [Animal Training Working Group Best Practices Guidelines](#) for a more detailed background information)

### 2.10 Veterinary: Considerations for health and welfare

This section briefly outlines any physical conditions or complaints commonly associated with the species. Requirements for behavioural as well as physical wellbeing are considered.

Symptoms, treatment and prevention of common diseases/conditions are outlined. Required vaccines may be specified, though the appropriate inoculation schedule should be left to the discretion of each collection's veterinary surgeon and not specified here. Common parasites, screening and treatments are outlined (again detailed

All forms/templates are available to download on the EAZA Member Area.



information on medical procedures not included). Information on causes of adult mortality is also included.

#### 2.11 Specific problems [If applicable]

Problems that are typical for the species, and not already part of previous paragraphs can be discussed here.

#### 2.12 Recommended research [If applicable]

The aim of collating information into the Guidelines format is as much to highlight what information is not available as to present that which is. Additional information is required in a number of areas to fill in obvious gaps or validate existing data, particularly where there are contradictory viewpoints. Section 2.10 highlights this, indicating appropriate areas for further research. Some of the questions raised may be addressed through the use of husbandry questionnaires, with a more in depth assessment of specific aspects carried out through research programmes.

### **Section 3**

#### References

Each of the EAZA Best Practice Guidelines must be referenced throughout and accompanied by a complete reference list together with suggested readings, highlighting works of particular use or interest. All information in the text should be referenced to one of the works included in this list or referenced as pers. comm. and attributed to a specified individual. This will ensure that, should questions arise, all data can be checked and validated. It also enables the interested reader to investigate specific aspects in more detail.

Include a complete reference list at the end, ensuring every in-text citation is matched in the list, and highlight any important additional suggested readings.

Authors should indicate the strength/source of each management recommendation (e.g. peer-reviewed evidence, professional consensus, or anecdotal).

References (following JAZR author Guidelines)

Accuracy and format of references is the responsibility of the author(s). References must be checked against the text to ensure (a) that the spelling of authors' names and the dates given are consistent and (b) that all authors quoted in the text (in date order if more than one) are given in the reference list and vice versa.

In the text, references must be arranged chronologically with the surname(s) of the author(s) followed by the date, with multiple references separated by semicolons (e.g. Pullen 2004; O'Malley 2025). For more than two authors, give the name of the first author followed by *et al.* and the date (e.g. Meireles *et al.*, 2025).

Use a, b, etc. after the year to distinguish papers published by the same author(s) in the same year (e.g. Meireles *et al.*, 2025a and Meireles *et al.*, 2025b). For two authors, use

All forms/templates are available to download on the EAZA Member Area.



both names and the year, use 'and' rather than '&' (e.g. Steinmetz and Zimmermann, 2011).

In the reference list, citations must be arranged first alphabetically under author(s) name(s) and then in chronological order if several papers by the same author(s) are cited, and all authors names should be included. Journal titles should be in full, not abbreviated, and italicised. Use En Dash, not hyphen, to separate page numbers.

Please see examples below.

#### Scientific Articles

- Meireles J.P., Scherer L., Lackey L.B., Steck B., Pluháček J., Roller M., Müller D., Bertelsen M., Clauss M. (2025a) Historical survivorship and demographic structure of zoo-housed hippopotamuses Hippopotamidae. *Journal of Zoo and Aquarium Research* 13(2): 65–80.
- Meireles J.P., Hahn-Klimroth M., Müller D., Dierkes P., Clauss M. (2025b) Body mass of adult zoo hippos Hippopotamidae and how they compare to data from populations in the wild. *Journal of Zoo and Aquarium Research* 13(2): 108–116.

#### Chapters in Books

- Steinmetz H.W., Zimmermann N. (2011) Computed Tomography for the diagnosis of sinusitis and air sacculitis in orangutans. In: Fowler, M.E. and Miller, E. (eds.). *Zoo and Wild Animal Medicine: Current Therapy Vol. VII*. St. Louis, Missouri: Elsevier Saunders, 422–430.

#### Books

- Zimmermann A., Hatchwell M., Dickie L., West C.D. (eds.) (2007) *Zoos in the 21st Century: Catalysts for Conservation?* Cambridge, UK: Cambridge University Press.

#### Online Resources

- Humle T., Maisels F., Oates J.F., Plumtre A. Williamson E.A. (2016) *Pan troglodytes* (errata version published in 2018). The IUCN Red List of Threatened Species 2016: e.T15933A129038584. <https://dx.doi.org/10.2305/IUCN.UK.2016-2.RLTS.T15933A17964454.en>. Accessed on 01 July 2025



## Appendix 5 a: TAG Evaluation - TAG Chair Questionnaire

2nd round of TAG evaluations as approved by the EEP Committee (September 2020)

Estimated time to complete: 15 -30 minutes.

Please be sure to complete this questionnaire within a single session as you will not be able to return to it later or edit your answers after you closed your browser. Within your session, you can go back and forwards and adapt your answers if needed before submitting your final input.

If you have any questions or run into any issues while providing your input, please feel free to contact your TAGs liaison.

### General TAG information

[Completed by EEO]

Name TAG Chair:

Date into position:

Current term ends in:

Name TAG Vice chair:

Date into position:

Current term ends in:

Name TAG Vice chair:

Date into position:

Current term ends in:

- 1. Please add any comments, corrections, or questions you may have regarding the information presented above**

### TAG Meetings

- 2. Please identify during which years TAG Midyear meetings were held (online or face-to-face)**

[Check box for last five years]

- 3. Please add any comments or questions you may have regarding the TAG (midyear) meetings held**

### Published Regional Species Plans

[Completed by EEO]

Currently published:

Scope (species) / Year

All forms/templates are available to download on the EAZA Member Area.



4. **Please describe any problems or difficulties you think exist in relation to the TAG's published RSP(s), if any**
5. **Please add any ideas or suggestions for improving your TAG's currently published RSP(s)**
6. **Please add any ideas or suggestions for the development of future RSP(s) of your TAG**

## **Population Management Programmes**

[Completed by EEO]

Status:

EAZA Ex situ Programmes proposed in the RSP [Name/Publication]: x  
EAZA Ex Situ Programmes established: Please update/complete the System for EEP Monitoring and submit it to your TAG liaison at the EEO)

### **7. Are there any specific challenges to get remaining EEPs established?**

*Refers to EEPs identified in your TAGs RSP(s) that have not been yet established at the time of this evaluation*

### **8. Reflecting on the data in the System for EEP Monitoring (SEM), can you give a general indication of how well the population management programmes within your TAG can function with the currently available tools and procedures?**

*As described in the Population Management Manual*

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

### **9. Reflecting on the data in the System for EEP Monitoring (SEM), provide additional comments, suggestions, or requests for support with regards to the functioning of the EEPs under your TAG's umbrella.**

### **10. Which EEPs under your TAG's remit would potentially require immediate follow action by the TAG (or EEP Committee) to improve their functionality. If any, please specify**

## **Long-Term Management Plans (LTMPs)**

[Completed by the EEO]

Currently published on the EAZA Member Area:

Title/ year of publication



.....

*In press [in case possible to find out]*

**11. What percentage (approximately) of programme species under your TAG's remit have a Long-Term Management Plan available?**

**12. Please describe any challenges or benefits you feel are worth mentioning in relation to LTMP(s) for your TAG**

### **Published EAZA Best Practice Guidelines**

[Completed by the EEO]

Currently published on [www.eaza.net](http://www.eaza.net):

Title / year of publication

.....

**13. What percentage of programme species under your TAG's remit are (approximately) covered by published EAZA Best Practice Guidelines?**

**14. Please list the Best Practice Guidelines that are currently under development**

**15. Please describe any problems or difficulties you think exist in relation to the production of your TAG's EAZA Best Practice Guidelines**

### **Other TAG activities**

**16. How would you rate the TAG's involvement/progress with research activities?**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**17. How would you rate the TAG's involvement/progress with conservation activities?**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**18. Feel free to report on progress or challenges you experience concerning research or conservation activities or any of the other TAG goals or activities**

*For instance, overarching goals or activities described in your RSP(s). If there is specific support from EAZA structures you need to overcome challenges described, please specify*

All forms/templates are available to download on the EAZA Member Area.



**19. Is your TAG represented or connected to what you consider the relevant IUCN SSC Specialist Group(s)?**

*e.g. being a member (reciprocal or not), (co)chair, in regular contact, etc.*

*Yes/No*

**20. Is the TAG represented or connected to (an)other, similar group(s) with a certain conservation mandate (e.g. BirdLife)?**

*e.g. being a member (reciprocal or not), (co)chair, in regular contact, etc.*

*Yes/No*

**21. Would you like support from the EEO or EEP Committee in (further) developing the relation with IUCN SSC Specialist Groups or one or more of these conservation groups? If so, please specify**

*Which groups, why and/or what type of support?*

## **Communication**

**22. How would you rate the overall activity and communication level of the TAG members?**

*Including internal (EAZA Member-based) advisors and vice-chair(s)*

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**23. Please add any additional comments or questions you may have regarding the activity and communication levels of TAG members**

*Including internal (EAZA Member-based) advisors and vice-chair(s)*

**24. How would you rate the involvement of EAZA Members in TAG activities?**

*Following recommendation, meeting attendance, general interest and commitment*

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**25. Please add any additional comments or questions you may have regarding the involvement of EAZA Members**

**26. Are there any communication channels/methods you use to promote your TAG and its activities - next to the EAZA Member Area - that the**

All forms/templates are available to download on the EAZA Member Area.



**EAZA Executive Office can potentially help promote through EAZA channels? Please specify**

*Social media pages, external websites, newsletter, etc.*

**Suggestions and Conclusion**

**27. Do you feel you have sufficient, time, resources and skills to perform the tasks of a TAG Chair?**

*Yes/No*

**28. Feel free to provide any additional comments, questions or suggestions you have regarding fulfilling your tasks as TAG Chair**

**29. Please provide any comments/suggestions you may have for improving the TAG Working Procedures as included in the Population Management Manual (Chapter 2.1)**

**30. Please provide any suggestions on how the participants, the TAG Chair, the TAG members, EAZA Members, the EEP committee and/or the EAZA Executive office can support in improving the functioning of the TAG**

*Please be specific*

**31. Conclusion of the TAG Chair: The functioning of the TAG is rated as**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**32. Name respondent**

**33. Institution**



## Appendix 5 b: TAG evaluation - TAG member questionnaire

2nd round of TAG evaluations as approved by the EEP Committee (September 2020)

Estimated time to complete: 10 -15 minutes.

Please be sure to complete this questionnaire within a single session as you will not be able to return to it later or edit your answers after you closed your browser. Within your session, you can navigate between questions and adapt your answers if needed before submitting your final input.

If you have any questions or run into any issues while providing your input, please feel free to contact your TAGs liaison

### Communication and activity

#### 1. How would you rate the activity and communication levels of the different parties below?

TAG Chair	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>
TAG members	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>
<i>Incl. internal (EAZA Member based) advisors and vice chair(s)</i>	
EAZA Executive Office	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>

#### 2. Please provide your comments or suggestions for improving activity and/or communication

*Please specify which party you are referring to*

#### 3. How would you rate the quality of your TAG meetings?

Chairing	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>
Content	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>
Preparation	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>
Minutes	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>
Follow up	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>
Frequency	<i>Excellent/Good/Sufficient/Insufficient/Unacceptable</i>

#### 4. Please provide your comments or suggestions for improving the TAG meetings

### Regional Species Plans (RSPs)

[Completed by EEO]

Currently published:

Scope (species) / Year

.....

All forms/templates are available to download on the EAZA Member Area.



**5. How would you rate the quality of RSP A?**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**6. Please describe any problems or difficulties you think exist in relation to the currently published RSP(s), if any**

*Please specify if it concerns all RSPs or specific RSPs*

**Best Practice Guidelines**

[Completed by the EEO]  
Currently published on [www.eaza.net](http://www.eaza.net)  
Title / year of publication  
.....

**7. How do you rate the availability of the TAG's currently published EAZA Best Practice Guidelines?**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**8. Please provide your comments or suggestions for improving the availability of the TAG's EAZA Best Practice Guidelines**

**Conservation and Research**

**9. How would you rate the TAG's involvement/progress with the following activities?**

*Described in the Regional Species Plan for instance*

Research *Excellent/Good/Sufficient/Insufficient/Unacceptable*

Conservation *Excellent/Good/Sufficient/Insufficient/Unacceptable*

**10. Please provide your comments or suggestions for improving the TAG's involvement/progress in research and conservation**

**Conclusion and General information**

**11. Please provide any additional comments or suggestions on how participants, TAG Chair, TAG members, EAZA members, EEP committee and/or the EAZA Executive office can support in improving the functioning of the TAG**

**12. Conclusion of TAG member**

**The functioning of the TAG is rated as**

All forms/templates are available to download on the EAZA Member Area.



*Excellent/Good/Sufficient/Insufficient/Unacceptable*

Please note - your answers and input will be anonymized for the overall Evaluation Summary Report

**13. Name**

**14. Institution**

**15. What is/are your role(s) as TAG member?**

*Vice chair/Programme coordinator/advisor/Other....*

**16. Since (approximately) when are you active as TAG member?**

*e.g. when you took your first role within the TAG*



## Appendix 5 c: TAG Evaluation - EEO Questionnaire

2nd round of TAG evaluations as approved by the EEP Committee (September 2020)

### General information

#### 1. Name TAG Liaison

### TAG Meetings

#### 2. How do you rate the activity and communication of the TAG chair?

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

#### 3. Are online or face-to-face TAG meetings held frequently (at least once or twice a year)?

*Yes/No*

#### 4. How do you rate the quality of the TAG meetings?

Chairing *Excellent/Good/Sufficient/Insufficient/Unacceptable*

Content *Excellent/Good/Sufficient/Insufficient/Unacceptable*

Preparation *Excellent/Good/Sufficient/Insufficient/Unacceptable*

Minutes *Excellent/Good/Sufficient/Insufficient/Unacceptable*

Follow up *Excellent/Good/Sufficient/Insufficient/Unacceptable*

#### 5. Please add any suggestions for improving the quality of the TAG meetings and/or activity TAG chair

### EAZA Member Area

#### 6. Is the TAG Annual Report published annually?

*Yes/No*

#### 7. How do you rate the overall quality of the TAG Annual Reports produced?

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

#### 8. Is the TAG proactively managing the TAG Workspace on the EAZA Member Area?

*Yes/No*

#### 9. Is the basic information on the TAG Workspace available and up to date? (studbooks, meeting minutes, programme annual reports)

*Yes/No*



**10. Please provide any additional comments when relevant**

**Regional Species Plans**

**11. How do you rate the involvement and input provided by the TAG during the preparation, developing and finalising the RSP(s)?**

Preparation process workshop *Excellent/Good/Sufficient/Insufficient/Unacceptable*  
Feedback/review process *Excellent/Good/Sufficient/Insufficient/Unacceptable*

**12. Please add any additional comments regarding your rating on the TAGs involvement and input during preparations, developing and finalising RSPs**

**13. How do you rate the involvement and input provided by the TAG during the preparation, developing and finalising EEP Applications?**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**14. Please add any additional comments regarding your rating on the TAGs involvement and input during preparations, developing and finalising EEP Applications**

**Programme Management**

**15. Give a general indication of how well the population management programmes under the remit of the TAG are functioning. (Please refer to the System for EEP Monitoring input received from the TAG, and keep the outcomes of the previous round of Evaluations in mind)**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**16. Please add any additional comments regarding your rating of the general functioning of the programmes (Please refer to the System for EEP Monitoring input received from the TAG)**

**17. Which EEPs under the TAGs remit would potentially require immediate follow up action by the TAG (or EEP Committee) to improve their functioning, and why?**

**18. Please describe any problems or difficulties you think exist in relation to the production of the TAGs EAZA Best Practice Guidelines, if any**

All forms/templates are available to download on the EAZA Member Area.



**19. How would you rate the TAGs involvement/progress in the following activities?**

Research      *Excellent/Good/Sufficient/Insufficient/Unacceptable*  
Conservation   *Excellent/Good/Sufficient/Insufficient/Unacceptable*

**Conclusion and suggestions for improvement**

**20. Conclusion of the EAZA Executive Office**

*Excellent/Good/Sufficient/Insufficient/Unacceptable*

**21. Please provide an overview of special achievements of this TAG (not mentioned already by the TAG chair or TAG members)**

**22. Please provide general suggestions or remarks for improvement of the functioning of the TAG**

**23. Where relevant, how can participants, TAG Chair, TAG members, EAZA Members, EEP committee and/or the EAZA Executive office support in making those improvements? (please be specific about which suggestions relates to which group of people)**



## Appendix 5 d: TAG Evaluation: Standard Summary Report

### General information – [NAME TAG]

TAG evaluation launched:                      Date  
TAG evaluation closed:                      Date  
Response rate TAG members:              x %

Name TAG Chair:  
Date into position:  
Current term ends in:

Name TAG Vice chair:  
Date into position:  
Current term ends in:

Name TAG Vice chair:  
Date into position:  
Current term ends in:

RSPs published / scheduled

- Scope (species) / Year
- ....

EAZA Best Practice Guidelines published

- Title / year of publication
- .....

Midyear meetings last five years:

- Month/Year
- Month/Year
- Month/Year
- Month/Year
- Month/Year

All forms/templates are available to download on the EAZA Member Area.



Activity of programmes [copy table of decisions from RSP + additional columns, AND include (a link to) the SEM spreadsheet submitted by the TAG, and the summary of the responses received from the holders]  
 (example below, summary tables may differ slightly in format)

Common name species ( <i>Scientific name</i> )	Direct Conservation role(s)	Indirect Conservation role(s)	Non-conservation role(s)	RSP category	EEP Cie approval	LMTP / Check-In	BPGs available	EEP Pages [since 2021]	ZIMS for Studbooks dataset (last edited vs currentness)
Banteng	<u>Insurance, Conservation education</u>	<u>Conservation education, Fundraising, Expertise</u>	N/A	EEP	Approved	GSMP			Nov2021 / March2021
<b>Total</b>				<b>x EEPs</b>	<b>x Approved</b>	<b>x LTMPs (incl. x GSMPs)</b>	<b>x BPGs</b>	<b>x EEP page</b>	

All forms/templates are available to download on the EAZA Member Area.



## Functioning of the TAG



4.00 Average Rating

### Midyear Meetings

*Text box for comments on meetings held*

### Population Management

#### Regional Species Plans

*Text box for summary and suggestions given to improve current and/or future RSPs*

#### Functioning of Population Management Programmes, based on the System of EEP Monitoring (SEM), is rated as:

Excellent/good/sufficient/insufficient/unacceptable

*Textbox for additional comments*

**Challenges identified in the functioning or establishing of programmes** *Text box for key challenges identified in the functioning or establishing of programmes, based on the System for EEP Monitoring (SEM)*

#### Programmes identified for immediate follow up by TAG (or EEP Committee)

*Text box for suggestions and argumentation*

#### EAZA Best Practice Guidelines

*Text box for comments and challenges identified with the production of BPGs*

#### Other TAG activities

*Text box for progress or challenges with conservation, research or other TAG activities*

#### Connections with external conservation groups

*Text box for suggestions or requests for improving or establishing connections*

#### Communication and activity

**TAG Members**

Excellent/good/sufficient/insufficient/unacceptable

**EAZA Members**

Excellent/good/sufficient/insufficient/unacceptable

*Text box for suggestions and comments*

#### Communication/promotion channels used by the TAG

(excl. EAZA Member Area, eNews or ZooQuaria and EAZA Social Media)

All forms/templates are available to download on the EAZA Member Area.



*Text box for listing and potential requests for support*

### **Fulfilling the TAG Chair position**

*Textbox for suggestions, comments and remarks regarding the tasks of TAG Chair, TAG Working Procedures or requests for support*

### **General conclusions and suggestions from the TAG Chair**

*Textbox for summary of suggestions for improving the functioning of the TAG and other remarks*

All forms/templates are available to download on the EAZA Member Area.



## EXAMPLE TAG SUMMARY REPORT

### Functioning of the TAG

Number of TAG members: 5  
Response rate: 4/5 (80 %)

★★★★☆  
3.25 Average Rating

### Profile of respondents (multiple answers possible):

● Vice chair	1
● Programme coordinator (EEP/...	2
● Internal (EAZA-Member based...	1
● Other	0



## Population Management

### Regional Collection Plans

*Text box for summary and suggestions given to improve current and future RCPs*

## Communication

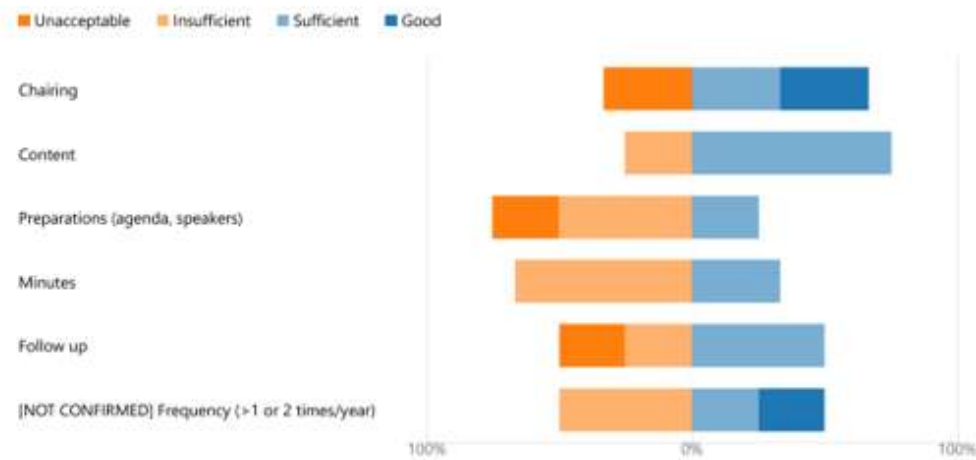
■ Unacceptable ■ Insufficient ■ Sufficient ■ Good



*Text box for summary and suggestions given to improve the TAG meetings*



### Frequency and quality TAG meetings



*Text box for summary and suggestions given to improve TAG meetings*

### EAZA Best Practice Guidelines

*Text box for summary and suggestions given to improve production of EAZA Best Practice Guidelines*

### Activity and progress on research and conservation



*Text box for summary and suggestions given on activity and progress research and conservation*

### General conclusions and suggestions from the TAG members

*Textbox for summary of suggestions for improving the functioning of the TAG and other remark*

All forms/templates are available to download on the EAZA Member Area.



## Functioning of the TAG

★★★★  
3.50 Average Rating

### Population Management

#### Involvement in developing Regional Species Plans

Preparation	Excellent/good/sufficient/insufficient/unacceptable
Review process	Excellent/good/sufficient/insufficient/unacceptable
Establishing EEP	Excellent/good/sufficient/insufficient/unacceptable

*Text box for comments and challenges identified*

### Functioning of Population Management Programmes

*Text box for comments and suggestions for intermediate EEP evaluations*

### Communication

#### Activity and communication TAG Chair

*Text box for comments and challenges identified*

#### Quality TAG meetings

*Text box for comments and challenges identified*

#### Use of and quality of material on EAZA Member Area

*Text box for comments and challenges identified*

### EAZA Best Practice Guidelines

*Text box for comments and challenges identified*

### Other TAG activities

#### Involvement/progress in conservation and research activities

*Text box for comments and challenges identified*

### Reflection on results first round TAG Evaluation [YEAR]

*Text box to highlight any priorities from last rounds evaluation*

All forms/templates are available to download on the EAZA Member Area.



## **Special achievements**

*Text box to highlight any special achievements not highlighted by Chair or TAG members*

## **General conclusions and suggestions from the EEO**

*Textbox for summary of suggestions for improving the functioning of the TAG and other remarks*



## Appendix 6: Proposal for new TAG

*Standard format for a proposal for a new TAG*

---

Proposal to establish an  
EAZA [TAXONOMIC GROUP] TAG

Prepared by

[NAME]  
[POSITION]  
[INSTITUTION]

### **STRUCTURE OF THE TAG**

*Contact details of the proposed TAG Chair (and when applicable also Vice chair(s)):*

[NAME]  
[POSITION]  
[INSTITUTION]  
[ADDRESS]  
[PHONE]  
[EMAIL]

Suggested TAG name:

.....

Proposed TAG members:

[NAMES & INSTITUTION]

Proposed TAG advisors:

[NAMES & INSTITUTION]

Current EEPs:

.....

TAG Chairs in other regions:

.....

All forms/templates are available to download on the EAZA Member Area.



Taxonomic group that will fall under the umbrella of the TAG:

.....

.....

.....

**RATIONALE FOR THE ESTABLISHMENT OF THIS TAG**

.....

.....

.....

**GOALS OF THE TAG**

.....

.....

.....

**REFERENCES**

.....

.....

.....

All forms/templates are available to download on the EAZA Member Area.



## Appendix 7a: Example letter of confirming support to a TAG (Vice) Chair

*This example letter of support includes all the necessary details and can be used to declare support for TAG (Vice-) Chairs, as a means to confirm that they will be provided with the required resources to perform their duties. The letter must be printed on the letter head of the institution and must be signed by the (zoological) director or CEO.*

### EAZA Executive Office

Chair EAZA EEP Committee  
C/o Amsterdam Zoo  
PO Box 20164  
1000 HD Amsterdam  
The Netherlands

[DATE], [PLACE]

Dear colleagues,

With this letter I would like to confirm that [INSTITUTION] will support [COLLEAGUE'S NAME] with the required resources for carrying out the tasks as [POSITION] for the [NAME OF TAG] as laid down in the EAZA Population Management Manual. This will include:

1. Enabling the TAG (Vice) Chair to carry out the required work (e.g. for the production of Best Practice Guidelines and Regional Species Plans).
2. Funding to attend the relevant meetings, at least once a year.
3. Funding for attending the **mandatory TAG Chairs course**.
4. Taking responsibility for the access to and use of community-restricted information as for example included on the EAZA website Member Area and data collected as part of this role.
5. Access to Species360 software and data by our institution's Species360 membership.

Yours sincerely,

[SIGNATURE]

[NAME DIRECTOR OR CEO] [POSITION]

All forms/templates are available to download on the EAZA Member Area.



## Appendix 7b: Example letter of providing institutional support to an EEP (Vice) Coordinator

*This example letter of institutional support includes all the necessary details and can be used to declare support for EEP (Vice) Coordinators. The letter must be printed on the letter head of the institution and must be signed by the (zoological) director or CEO.*

**EAZA Executive Office**  
Chair EAZA EEP Committee  
C/o Amsterdam Zoo  
PO Box 20164  
1000 HD Amsterdam  
The Netherlands

[DATE], [PLACE]

Dear colleagues,

With this letter I would like to confirm that [INSTITUTION] will (continue) to host the [NAME OF EEP] *this is not applicable to EEP Vice coordinators*

[INSTITUTION] confirms that it will support [COLLEAGUE'S NAME] for carrying out the tasks as [POSITION] for the [NAME OF EEP] as laid down in the EAZA Population Management Manual. This will include:

1. Sufficient allocation of time to carry out the required work (e.g. day to day running of a programme).
2. Funding to attend the relevant meetings, at least once a year.
3. Funding for attending the **mandatory Introduction to EAZA Ex situ Programme Management Course (EEP Coordinators)**.
4. Access to e-mail communication.
5. Taking responsibility for the access to and use of community-restricted information as for example included on the EAZA website Member Area and data collected as part of this role.
6. Access to Species360 software and data by our institution's Species360 membership.

Yours sincerely,

[SIGNATURE]  
[NAME DIRECTOR OR CEO] [POSITION]

All forms/templates are available to download on the EAZA Member Area.



## Appendix 7c: Example letter of withdrawing institutional support

*This example letter for the withdrawal of institutional support includes all the necessary details and can be used to withdraw institutional support to an EEP hosted by the institution. The letter should be printed on the letter head of the institution and must be signed by the (zoological) director or CEO.*

### **EAZA Executive Office**

Chair EAZA EEP Committee  
C/o Amsterdam Zoo  
PO Box 20164  
1000 HD Amsterdam  
The Netherlands

[DATE], [PLACE]

Dear colleagues,

With this letter I would like to confirm that [INSTITUTION] is willing to withdraw its institutional support for hosting the following EAZA Ex situ Programme:

- [NAME OF PROGRAMME]

We will make sure that all (studbook) data will be made available to the new EEP Coordinator, or in case the position will not be taken over directly, to the relevant TAG as well as the EAZA Executive Office.

Yours sincerely,

[SIGNATURE]

[NAME DIRECTOR OR CEO]  
[POSITION]



## Appendix 7d: Example letter for providing TAG support for EEP Coordinators

*This example letter of TAG support can be used as a basis to declare support for new EEP Coordinators. The text can be sent to the EAZA Executive Office by email with TAG Vice chair(s) and the person it is concerning copied in.*

Dear colleagues,

With this letter I would like to confirm that the [TAG name] TAG supports [COLLEAGUE'S NAME] nomination for [POSITION] for the [NAME OF EEP].

- *Please briefly describe the history leading to the nomination of a new Coordinator or keeper: reason(s) for need of new Coordinator or keeper, steps the TAG has taken to find the person, if someone volunteered or was chosen from a number of other potential candidates.*
- *If relevant, please briefly describe any other aspects you find important to mention to the EEP committee members on why this person is nominated (e.g. skills, experience).*
- *Please briefly describe the intended steps for a successful handover or start-up of the programme/studbook (e.g. period, manner, lending of support).*

Yours sincerely,

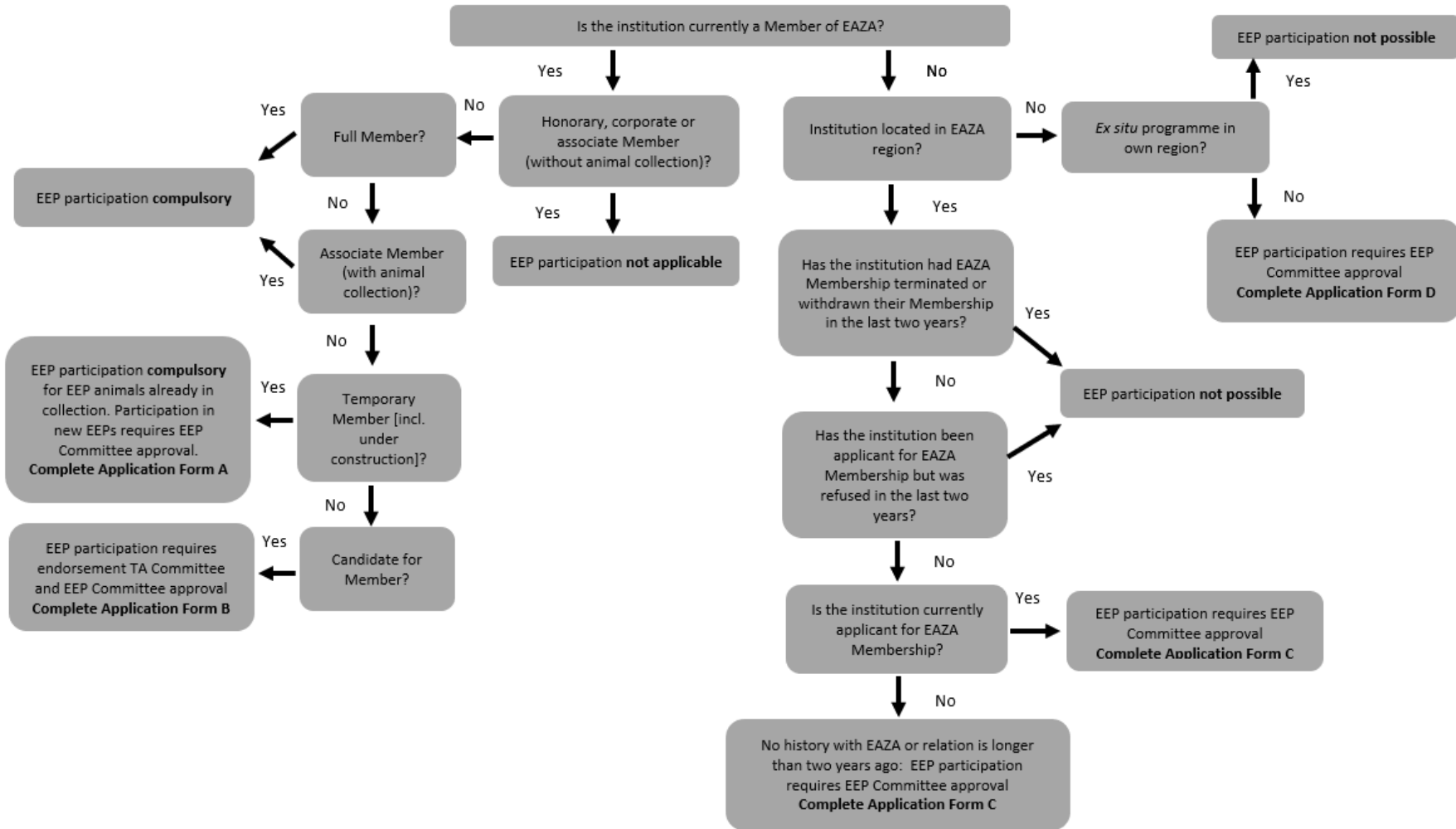
[NAME TAG Chair] [TAG name]

cc. [NAME TAG Vice chair (s)], [COLLEAGUE'S NAME]

All forms/templates are available to download on the EAZA Member Area.



## Appendix 8: Decision tree EAZA EEP participation procedure





## Appendix 9: Temporary Member participation in an EEP - standard format for requesting approval from the EEP Committee - Application form A –Temporary Membership [including Temporary Membership under construction]

### 1. Contact details

<p><b>Name of the EEP</b> <b>EEP Coordinator</b></p> <p><b>Requested EEP Participant:</b> <b>Institution name</b> <b>Street + number</b> <b>Zip code</b> <b>City</b> <b>Country</b> <b>Phone number</b> <b>Name Contact Person</b> <b>Email</b></p>
---

### 2. Motivation

**Describe why** the participation of above mentioned institution/person would be important/ for the long-term management/ benefit of the EEP.

Please provide information on:

- **Holding space**  (e.g. Would the proposed participant make holding or breeding space available that is essential to the EEP?)
- **Genetics**  (e.g. Does the proposed participant hold animals that would make a valuable genetic contribution to the EEP?)
- **Other** , (e.g. linked to programme characteristics as mentioned in EEP Application such as research)

**Please describe:**

All forms/templates are available to download on the EAZA Member Area.



**Please add** the relevant part of the RSP (e.g. relevant programme role(s)) and/or LTMP (if existing; programme goals) [<https://members.eaza.net/LTMP-RSP>]:

In case of a shortage of holding space, was the species, or were these individuals, advertised among the full EAZA membership by:

- ZIMS Available and Wanted list
- EAZA News (eNews, Zooquaria)
- Shortness of holding space is not the constraint
- Other:

**3. Did you receive information about the (to be constructed) housing and husbandry conditions for the EEP animals, and are you satisfied with the quality of these? Please elaborate on these answers below the tick boxes**

- Yes  No

If yes please elaborate

**4. Has the Species Committee approved the proposed participant?**

- Yes- done  
 No – no Species Committee in place

No – because

**5. In case of transfers, will animals be sent on loan basis?**

- Yes  No

*It is strongly suggested to send EEP animals to approved non-EAZA EEP institutions on a loan basis, to be able to later retrieve animals if necessary and/or when relevant.*

The EEP fee is part of the Temporary Membership fee and hence does not apply to Temporary Members.

Date:

Place:

**Please submit your request to the EEP Committee via your TAG liaison at the EAZA Executive Office.**



## Appendix 10: Candidate for Membership participation in an EEP - standard format for requesting approval from the EEP Committee Application form B – Candidate for Membership

### 1. Contact details

**Name of the EEP**  
**EEP Coordinator**

**Requested CfM EEP**  
**Participant:**  
**Institution name**  
**Street + number**  
**Zip code**  
**City**  
**Country**  
**Phone number**  
**Name Contact Person**  
**Email**

### 2. Motivation

**Describe why** the participation of above mentioned institution/person would be important for the long-term management of the EEP and/or the CfM process of the institution.

Please provide information on:

- **Holding space** (e.g. Would the proposed participant make holding or breeding space available that is essential to the EEP?)
- **Genetics** (e.g. Does the proposed participant hold animals that would make a valuable genetic contribution to the EEP?)
- **Other**, (e.g. linked to programme characteristics as mentioned in EEP Application such as research)

**Please describe:**

**Please add** the relevant part of the RSP (e.g. relevant programme role(s)) and/or LTMP (if existing; programme goals) [<https://members.eaza.net/LTMP-RSP>]:



In case of a shortage of holding space was the species, or were these individuals, advertised within the full EAZA membership by:

- ZIMS Available and Wanted list
- EAZA News (eNews, Zooquaria...)
- Shortness of holding space is not the constraint
- Involvement non-EAZA facilities is part of the programme characteristics of this EEP
  
- Other:

**3. Did you send the proposed participant the EAZA Population Management Manual, and particular [chapter 3 Working procedures for EEPs](#), or did you otherwise explain the functioning of EEPs and the requirements of the participant?**

- Yes     No

*If no, please do so, this is a requirement of non-EAZA EEP participation.*

**4. Are you confident that the proposed participant will adhere to the requirements of EEP participation?**

- Yes     No

**5. Did you receive a letter in support of EEP participation from the Technical Assistance Committee mentor?**

- Yes     No > *arrange the support letter from the Technical Assistance Committee mentor before handing in your application.*

**If yes**, please attach the support letter to this form.

**6. Has the Species Committee approved the proposed participant?**

- Yes - done  
 No - no Species Committee in place

All forms/templates are available to download on the EAZA Member Area.



No – because

**7. Did you receive information about the housing and husbandry conditions for the EEP animals, and are you satisfied with the quality of these?**

Yes  No

If yes, please elaborate

**8. Does the proposed participant currently hold animals of the EEP species in question?**

Yes

Number of EEP animals currently held:

Male

Female

No Unknown

**9. Does the institution to your knowledge participate in other EEPs?**

Yes  No

If **yes**, participation in the following EEPs [<https://members.eaza.net/tags>]:

**10. In case of transfers, will animals be sent on loan basis?**

Yes  No

*It is strongly suggested to send EEP animals to approved non-EAZA EEP institutions on a loan basis, to be able to later retrieve animals if necessary and/or when relevant.*

The EEP fee is part of the Candidate for Membership fee (max 5 EEPs) and hence not applicable.

**Date:**

**Place:**

**Please submit your request to the EEP Committee via your TAG liaison at the EAZA Executive Office.**



## Appendix 11: Non-EAZA institution participation in an EEP – standard format for requesting approval from the EEP Committee - Application form C –Non-Member of EAZA, in EAZA region

### 1. Contact details

<p><b>Name of the EEP</b> <b>EEP Coordinator</b></p> <p><b>Requested non-EAZA Participant:</b></p> <p><b>Institution name</b> <b>Street + number</b> <b>Zip code</b> <b>City</b> <b>Country</b> <b>Phone number</b> <b>Name Contact Person</b> <b>Email</b></p>
<p><b>Does this institution have a (recent) history with EAZA Membership?</b></p> <p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p> <p><b>If yes:</b></p> <p><input type="checkbox"/> The zoo is somewhere in the accreditation procedure. <input type="checkbox"/> The zoo has been screened more than two years ago, and Membership was refused. <input type="checkbox"/> The zoo voluntarily left the EAZA Membership more than two years ago. <input type="checkbox"/> The zoo has been a Member of EAZA and Membership has been terminated more than two years ago.</p> <p><b>If no:</b> Why is this non-EAZA institution not a Member of EAZA?</p>

### 2. Motivation



**Describe why** the participation of above mentioned institution/person would be important for the long-term management and/or selected roles of the EEP. Please provide information on the needs of the programme e.g.:

- **Holding space** (e.g. Would the proposed participant make holding or breeding space available that is essential to the EEP?)
- **Genetics** (e.g. Does the proposed participant hold animals that would make a valuable genetic contribution to the EEP?)
- Other, (e.g. linked to programme characteristics as mentioned in EEP Application such as research)

**Please describe: .....**

**Please add** the relevant part of the RSP (e.g. relevant programme role(s) and/or LTMP (if existing; programme goals) [<https://members.eaza.net/LTMP-RSP>]:

.....

**In case of a shortage of holding space, was the species, or were these individuals, advertised within the EAZA Membership by:**

- ZIMS Available and Wanted list
- EAZA News (eNews, Zooquaria...)
- Shortness of holding space is not the constraint
- Involvement non-EAZA facilities is part of the programme characteristics of this EEP
- Other: .....

**2. Did you send the proposed participant the EAZA Population Management Manual, in particular [chapter 3 Working procedures for EEPs](#), or did you otherwise explain the functioning of EEPs and the requirements of the participant?**

- Yes       No

*If no, please do so, this is a requirement of non-EAZA EEP participation.*



**3. Are you confident that the proposed participant will adhere to the requirements of EEP participation** and demonstrate an appropriate level of commitment to the goals of the programme similar to what is expected from EAZA Members participating in the EEP?

- Yes       No

**4. Is there a potential reputational risk for EAZA to have this facility officially approved for their participation in this EEP?**

- Yes       No

Please explain why you believe or do not believe there to be any reputation risk: .....

**5. Has the Species Committee approved the proposed participant?**

- Yes - done  
 No - no Species Committee in place  
 No – because

**6. Have you received information about the housing and husbandry conditions for the EEP animals, and are you satisfied with the quality of these?**

- Yes       No

Please describe: .....

**7. Does the proposed participant currently hold animals of the EEP species in question?**

- Yes

Number of EEP animals currently held:

Male

Female

- Unknown  
 No

**8. Does the institution, to your knowledge, participate in other EEPs?**

All forms/templates are available to download on the EAZA Member Area.



Yes       No

**If yes**, participation in the following EEPs [<https://members.eaza.net/tags>]:

.....

**9. In case of transfers, will animals be sent on loan basis?**

Yes       No

*It is strongly suggested to send EEP animals to approved non-EAZA EEP institutions on a loan basis, to be able to later retrieve animals if necessary and/or when relevant.*

**10. Do you wish to request an exemption for paying the required non-EAZA EEP participation fee (not applicable to a licensed zoo or aquarium in the EAZA region)?**

Exemption participation fee requested:

Yes       No

**11. If yes to question 11, please explain why this proposed participant should be granted exemption.**

*Be reminded that the facility is required to sign the 'Agreement of participation in the EEP' (see Appendix 13 EAZA Template contract for non-EAZA EEP participants) if approved. The EEP Coordinator is responsible for arranging this and getting the contract signed.*

**Date:**

**Place:**

**Please submit your request to the EEP Committee via your TAG liaison at the EAZA Executive Office.**



## Appendix 12a: Non-EAZA institution participation in an EEP- standard format for requesting approval from the EEP Committee - Application form D – Non-Member of EAZA, the proposed EEP participant is located out of the EAZA region.

### 1. Contact details

<p><b>Name of the EEP</b> <b>EEP Coordinator</b></p> <p><b>Requested non-EAZA Participant:</b> <b>Institution name</b> <b>Street + number</b> <b>Zip code</b> <b>City</b> <b>Country</b> <b>Phone number</b> <b>Name Contact Person</b> <b>Email</b></p>
<p><b>Is the institution a member of a regional or national association in their region or country that is an Association Member of WAZA (for example AZA, ALPZA, PAAZA, etc)?</b></p> <p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p> <p><b>If yes, which regional or national association(s):</b></p> <p><input type="checkbox"/> Please specify: .....</p> <p><b>Does this region have a population management programme for the above mentioned species?</b></p> <p><input type="checkbox"/> Yes &gt; <i>it is not possible for the above mentioned institution to participate in this EEP, unless agreements are in place between EAZA and that regional association.</i></p> <p><input type="checkbox"/> No</p> <p><b>Does participation of the institution oppose any species plans of the Regional or National Zoo Association, being a member of WAZA, in the</b></p>



respective region?'

Yes

No

## 2. Motivation

**Describe why** the participation of above mentioned institution/person would be important for the long-term management and/or selected roles of the EEP. Please provide information on:

- **Holding space** (e.g. Would the proposed participant make holding or breeding space available that is essential to the EEP?)
- **Genetics** (e.g. Does the proposed participant hold animals that would make a valuable genetic contribution to the EEP?)
- **Other** (e.g. Linked to other programme characteristics as mentioned in EEP Application such as research)

**Please describe:**

.....

**Please add** the relevant part of the RSP (e.g. relevant programme role(s)) and/or LTMP (if existing; programme goals) [<https://members.eaza.net/LTMP-RSP>]:

**In case of a shortage of holding space was the species, or were these individuals, advertised within EAZA Membership by:**

- ZIMS Available and Wanted list
- EAZA News (eNews, Zooquaria...)
- Shortness of holding space is not the constraint
- Involvement non-EAZA facilities is part of the programme characteristics of this EEP
- Other:

## 3. Did you send the proposed participant the EAZA Population Management Manual, in particular [chapter 3 Working procedures for](#)



**EEPs, or did you otherwise explain the functioning of EEPs and the requirements of the participant?**

- Yes       No

*If no, please do so, this is a requirement of non-EAZA EEP participation.*

**4. Are you confident that the proposed participant will adhere to the requirements of EEP participation?**

- Yes       No

**5. Is there a potential reputational risk for EAZA to have this facility officially approved for their participation in this EEP?**

- Yes       No

Please explain why you believe or do not believe there to be any reputation risk: .....

**6. Has the Species Committee approved the proposed participant?**

- Yes - done  
 No - no Species Committee in place  
 No – because

**7. Did you receive information about the housing and husbandry conditions for the EEP animals, and are you satisfied with the quality of these?**

- Yes       No

Please describe: .....

**8. Does the proposed participant currently hold animals of the EEP species in question?**

- Yes

Number of EEP animals currently held:  
Male  
Female

All forms/templates are available to download on the EAZA Member Area.



Unknown

No

**9. Does the institution to your knowledge participate in other EEPs?**

Yes

No

**If yes,** participation in the following EEPs [<https://members.eaza.net/tags>]:

.....

**10. In case of transfers, will animals be sent on loan basis?**

Yes

No

*It is strongly suggested to send EEP animals to approved non-EAZA EEP institutions on a loan basis, to be able to later retrieve animals if necessary. When relevant.*

**11. Do you wish to request an exemption for paying the required non-EAZA EEP participation fee?** - Members of a regional or national association in their region or country that is an Association Member of WAZA (for example AZA, ALPZA, PAAZA, etc are automatically exempted

Exemption participation fee requested:

Yes

No

**12. If yes to question 11, please explain why this proposed participant should be granted exemption.**

*Be reminded that the facility is required to sign the 'Agreement of participation in the EEP' (see Annex XX EAZA Template contract for non-EAZA EEP participants) if approved. The EEP Coordinator is responsible for arranging this and getting the contract signed.*

**Date:**

**Place:**

**Please submit your request to the EEP Committee via your TAG liaison at the EAZA Executive Office.**



**Appendix 12b: Non-EAZA institution, outside the EAZA region - standard format for requesting outplacement approval from the EEP Committee - Application form E – Non-Member of EAZA, the proposed facility is located outside the EAZA region.**

**1. Contact details**

<p><b>Name of the EEP</b> <b>EEP Coordinator</b></p> <p><b>Requested non-EAZA Participant:</b> <b>Institution name</b> <b>Street + number</b> <b>Zip code</b> <b>City</b> <b>Country</b> <b>Phone number</b> <b>Name Contact Person</b> <b>Email</b></p>
<p><b>Is the institution a member of a regional or national association in their region or country that is an Association Member of WAZA (for example AZA, ALPZA, PAAZA, etc)?</b></p> <p><input type="checkbox"/> Yes    <input type="checkbox"/> No</p> <p><b>If yes</b>, which regional or national association(s):</p> <p><input type="checkbox"/> Please specify: .....</p> <p><b>Does this region have a population management programme for the above mentioned species?</b></p> <p><input type="checkbox"/> Yes &gt; <i>it is not possible for the above mentioned institution to participate in this EEP, unless agreements are in place between the EEP and that regional association.</i></p> <p><input type="checkbox"/> No</p> <p><b>Does participation of the institution oppose any species plans of the</b></p>



**Regional Zoo Association in the respective region?'**

Yes

No

**2. Motivation**

**Describe why** the resp. individuals are no longer relevant for the EEP population and/or the roles selected. Please provide information on:

- **Holding space**  (e.g. Would the proposed participant make holding or breeding space available that is essential to the EEP?)
- **Genetics**  (e.g. Does the proposed participant hold animals that would make a valuable genetic contribution to the EEP?)
- **Other**  (e.g. Linked to other programme characteristics as mentioned in EEP Application such as research)

**Please describe:**

.....

**When relevant Please add** the relevant part of the RSP (e.g. relevant programme role(s)) and/or LTMP (if existing; programme goals) [source <https://members.eaza.net/LTMP-RSP>]:

**In case of a shortage of holding space was the species, or were these individuals, advertised within EAZA Membership by:**

- ZIMS Available and Wanted list
- EAZA News (eNews, Zooquaria...)
- Shortness of holding space is not the constraint
- Other:

**3. Is there a potential reputational risk for EAZA to have this facility officially approved for their participation in this EEP?**

Yes       No

Please explain why you believe or not believe there to be any reputation risk: ....

All forms/templates are available to download on the EAZA Member Area.



5. **Has the Species Committee approved the proposed facility?**

- Yes - done
- No - no Species Committee in place
- No - because

6. **Did you receive information about the housing and husbandry conditions for the EEP animals, and are you satisfied with the quality of these?**

- Yes
- No

Please describe: .....

7. **Participation is not proposed, this is an exceptional case, having a transfer outside of the EAZA region confirmed/agreed upon by the EEP Committee, without the intention of having the facility formalised as an official non-EAZA EEP participant.**

Please explain why: ...

8. **In case of transfers, will animals be sent on loan basis?**

- Yes
- No

**Date:**

**Place:**

**Please submit your request to the EEP Committee via your TAG liaison at the EAZA Executive Office.**



## Appendix 13: EAZA Template contract for non-EAZA EEP participants

Agreement of participation in the EEP of the

---

*(species; English plus scientific name)*

The Undersigned,

---

*(name of institution or private person),*

declares their willingness to participate in the EAZA Ex situ Programme (EEP) of the above mentioned species, contribute to the roles selected, and confirm the receipt of the Population Management Manual (PMM) and understanding of the rights and obligations that come with being an EEP participant.

As non-EAZA EEP participant, we agree to follow the rules and procedures as described in the PPM. This includes, but is not limited to, the following points from chapter 3.7;

- As per the date of your approval as non-EAZA EEP participant, all **[SPECIES]** held at **[NAME FACILITY]** become part of the EEP without exception.
- Transfer recommendations in and out of your facility and (non) breeding recommendations are subject to approval by the EEP (this is a mandatory aspect of EEP participation). The EEP will obviously follow a democratic process to develop these recommendations that the EEP participant is fully part of.
- The EEP is non-commercial, and this means that animals participating in the EEP cannot be sold or leased.
- The participant - although being the rightful owner of particular individuals of the EEP population - will cooperate in the species' management as if its population were common property of the entire group of participants.
- Non-EAZA EEP participants pay an annual fee per programme.

Sufficient notice must be given when this commitment is ended. The resp. EEP animals will be retrieved by the programme.

The participant designates

---

All forms/templates are available to download on the EAZA Member Area.



*(name and position of staff member of the institution, or in case of private participant, the participant him/herself)*

as its representative for the species. The EEP Coordinator will be duly informed of a possible future change of the species' representative.

Signature plus date *(name institution and/or person in charge)*  
*(full address plus phone number, and e-mail address)*



## Appendix 14: EAZA studbook template

The template below can be used as guidance for making an EEP studbook. The template gives an overview of all the topics that should be covered every three years. In between an update of the most relevant information will be sufficient.

- Cover
  - Common name and scientific name
  - Edition
  - Publication date
  - Currentness date of data
  - Studbook Keeper details (name, institution, address, email)
  - EEP logo
  - EAZA logo
  - Institution logo
  - Picture
  - Scope of studbook (International or EEP)
- Table of contents
- Introduction
- Studbook disclaimer (see draft example below)
- Acknowledgements
- Summary
- Contents:

### ***Geographic scope of regional studbook***

- Which countries, institutions are included?
- What (sub)species have been included?
- Data current through (date)?

### ***General information on the species from the wild (first report only; or relevant updates since first report)***

- Taxonomy
- Distribution and habitat
- Social system/ mating system and behavioural peculiarities
- Reproductive and life cycle characteristics (e.g. sexual/asexual reproduction; sequence and duration of life stages; age of first reproduction, litter/clutch size, number of progeny per year, seasonality, oestrus cycle/fertile period, incubation/gestation length, sex ratio at birth, etc.)
- Longevity
- Diet

All forms/templates are available to download on the EAZA Member Area.



- Conservation status (IUCN Red Listing (if any), remaining populations, population, main threats and others)
- Bibliography (literature sources consulted)

***Publications of interest (references and EAZA Best Practice Guidelines)  
Studbook data analysis reports (including explanatory paragraphs)***

Data permitting, the following should be included at the minimum:

- Roles of the EEP (as stated in the RSP/EEP application form)
- Genetic and demographic goals for the population
- Important outstanding data validation issues (where relevant)
- Details of any demographic or genetic assumptions made in an analytical overlay
- Genetic analysis
  - % of pedigree known (this should be **at least about 85%** in order for the genetic summary statistics to be reliable; if it is less, EEP coordinators can contact the EEO PMC to discuss how best to proceed)
  - current and potential
    - #founders, gene diversity retained, founder genome equivalents, population mean kinship, mean inbreeding coefficient
- Current population size and census graph (by sex and by birth type)
- Age/life stage pyramid
- Number of captive births per year over last five years  
Number of captive deaths per year over last five years  
Age Specific Fecundity (Mx) (table and graph) (stipulate which filter settings were used in SPARKS; whether or not the data were smoothed; whether or not the data were adjusted for sample size effects)  
Age Specific Mortality (Qx) table and graph) (stipulate which filter settings were used in SPARKS; whether or not the data were smoothed; whether or not the data were adjusted for sample size effects)
- Summary of changes in population status since last studbook
- Special issues/problems

***Studbook data***

- Data field descriptions (explanation of column headings, where relevant, especially when using User Defined Fields)
- Definitions of abbreviations used (where relevant)
- Conventions and assumptions, for example
  - What does hatch date represent?
  - How did you enter data for wild caught animals with unknown birth and capture date?

All forms/templates are available to download on the EAZA Member Area.



- Parental assumptions, etc.
- Living population listing (by institution)
  - Births since last studbook (by birth date)
  - Deaths since last studbook (by death date)
  - Transfers since last studbook (by transfer date)
  - Historical population listing (by studbook number, once every 3 yrs.)

***Location glossary (EAZA short name for institution, full name of institution, institutional contact person, address, telephone, email)***

***Studbooks in other regions (institution name, Studbook Keeper name, address, email)***

Note: For fish, amphibians and invertebrates, present what you can and where possible provide suitable/relevant alternatives

Example studbook disclaimer

Copyright (publication date) by EAZA and (Studbook Keeper's institution name). All rights reserved. No part of this publication may be reproduced in hard copy, machine-readable or other forms without advance written permission from EAZA. Members of the European Association of Zoos and Aquaria (EAZA) may copy this information for their own use as needed. The information contained in this studbook has been obtained from numerous sources believed to be reliable. EAZA and the (Studbook Keeper's institution name) make a diligent effort to provide a complete and accurate representation of the data in its reports, publications, and services. However, EAZA and the (Studbook Keeper's institution name) do not guarantee the accuracy, adequacy, or completeness of any information. Correctness of the data depends on the quality of data submitted by the holders to a high degree. EAZA and the (Studbook Keeper's institution name) disclaim all liability for errors or omissions that may exist and shall not be liable for any incidental, consequential, or other damages (whether resulting from negligence or otherwise) including, without limitation, exemplary damages or lost profits arising out of or in connection with the use of this publication. Because the technical information provided in the studbook can easily be misread or misinterpreted unless properly analysed, EAZA and (Studbook Keeper's institution name) strongly recommend that users of this information consult with the Studbook Keeper in all matters related to data analysis and interpretation.

All forms/templates are available to download on the EAZA Member Area.



## Appendix 15: Guidelines for Veterinary Advisors appointed to EAZA TAGs and EEPs

(Revised version November 2025)

EAZA leads in animal management and care across Member zoos and aquariums by maintaining healthy populations and individuals with positive animal welfare.

EAZA approved Veterinary Advisors (VAs) to EAZA Taxon Advisory Groups (TAGs) and EAZA Ex situ Programmes (EEPs) have a significant role to play in this. They serve as part of the TAGs and EEP Species Committees by advising on issues concerning individual and population health, contributing to best practice guidelines and providing information and clinical advice to collections, and their veterinarians as required.

All EAZA TAGs and EEPs should appoint at least one (or more) Veterinary Advisor(s). The TAG Chair or the EEP Coordinator has a responsibility to ensure that the VA has access to all the relevant information. All EAZA approved VAs will be allowed access to the EAZA Member Area either directly via their EAZA Member employer, or indirectly by way of their EAZWV membership and their supporting EAZA institution.

More information on the VA role, how VAs get appointed, what tools are available to VAs, and how the EAZA Veterinary Committee and joint EAZA/EAZWV subgroups support this can be found below and (in more detail) in the EAZA Vet Advisor Resource Manual which is available on the EAZA Member Area.

### **Different types of Veterinary Advisors**

Veterinary Advisors can be appointed at EEP-level (i.e. advising on or more individual species) and at TAG-level (i.e. advising on the respective taxonomic group as a whole and not advising on individual species). All VAs working on species belonging to a particular TAG form part of the TAG Vet Advisor team. The TAG VA team works together to find consistent approaches to managing issues that may be relevant to a number of different species within the TAG. The TAG VA team appoints one spokesperson (the TAG VA Representative or Rep.) for communication and coordination with the TAG chair. TAG and EEP VAs have slightly different duties and responsibilities.

### **The role and duties of a Taxonomic Advisory Group (TAG) Veterinary Advisor**

All forms/templates are available to download on the EAZA Member Area.



Roles and duties of the TAG VA team:

- TAG VA team members are required to liaise with each other and achieve consensus on how to manage health issues that impact multiple species within the TAG.
- TAG VA team members will be involved in producing TAG level veterinary guidelines and protocols and ensuring that these are disseminated to veterinarians working with these species. Approval processes for EAZA veterinary guidelines and documents are outlined in the EAZA Vet Advisor Resource Manual which is available on the EAZA Member Area.

Roles and duties of the TAG VA Rep.:

- The TAG VA Reps are strongly encouraged to join the TAG mid-year meetings (or appoint a deputy from the relevant TAG VA team if they cannot attend).

Roles and duties of a TAG VA:

- Act as a link between the TAG and the TAG VA team to ensure effective communication.
- Coordinate the production of TAG level veterinary guidelines and protocols and their dissemination to practitioners working with these species (via EAZA and EAZWV).
- Coordinate the general activities of the Veterinary Advisor team.

### **The role and duties of an EEP Veterinary Advisor**

The appointed EEP Veterinary Advisor(s) is by default a non-voting member of the EEP Species Committee (when in place). Please note that as part of the Species Committee, the VA recommendations should take account of collective species management priorities that are linked to the roles and goals that are set for each EEP. The duties of an EEP VA include (but are not limited to):

1. Producing the veterinary section in the EAZA Best Practice Guidelines and keep it updated.
2. Identifying and regularly reviewing the major health issues impacting the EEP they advise (via review of Post-mortem reports and other medical records).
3. Providing recommendations as to how best monitor and manage health issues identified as priorities in the species (these may include diagnostic protocols, therapeutic protocols, and preventative measures such as

All forms/templates are available to download on the EAZA Member Area.



quarantine, nutrition, vaccination etc.) and assisting with dissemination of these recommendations to veterinarians working with the species.

4. Producing a brief Annual Veterinary report on issues pertaining to the species
5. Providing advice to veterinarians working with the species as required.
6. Liaising with other TAG VA team members and achieving consensus on how to manage health issues that impact multiple species within the TAG.
7. Contributing to producing TAG level veterinary guidelines and protocols and ensuring that they are disseminated to veterinarians working with these species.
8. Proactively encouraging peers at EAZA Member facilities to sample blood, tissue and/or serum from all EEP individuals for storage in the EAZA Biobank.
9. Disseminating information and recommendations pertaining to the health of the species via conferences and publications (e.g. EAZA and EAZWV conferences, publications: JZAR and JZWM, Zooquaria, EAZWV and EAZA newsletters and the websites of both EAZA and EAZWV).
10. Liaising with Veterinary Advisors in other regions (e.g. American Zoo Association, Zoo Association of Australasia etc.) especially where populations are managed across regions.

### **Approval procedure of Veterinary Advisors**

The VA position is based on personal and professional expertise and does need institutional support from an EAZA Member. EEP Veterinary Advisors are nominated by the EEP Coordinator and approved by the EEP Species Committee (when in place). Veterinary Advisors working only at TAG level are appointed by the TAG Chair with approval by the TAG members.

A VA application (i.e. 'expression of interest') form, as well as more details on the application procedure, can be found in the EAZA Vet Advisor Resource Manual which is available on the EAZA Member Area.

Upon appointment, all Veterinary Advisors must confirm to the relevant EEP Coordinator and/or TAG Chair that they understand the commitment and duties required by them. They should confirm institutional support from a Full, Temporary or Associate EAZA Member (also if not working for an EAZA Member

All forms/templates are available to download on the EAZA Member Area.



institution) to ensure that they have access to ZIMS and other data and documentation for the relevant species. A template letter for providing institutional support to a VA is provided in the EAZA Vet Advisor Resource Manual which is available on the EAZA Member Area. GDPR consent to EAZA and EAZWV for storing contact details and agreement to abide by the data confidentiality and ownership clauses (see below) is also needed. Once an EEP Veterinary Advisor or TAG Vet Advisor's appointment is confirmed, the EEP Coordinator or TAG Chair informs the EAZA Executive Office (EEO) TAG liaison.

The EAZA Executive Office (EEO) will add the contact details of the Veterinary Advisor to the Veterinary Advisor directory and EAZA Vet Advisor emailing list. The Veterinary Advisor directory can be accessed via the EAZA Veterinary Committee workspace and via the EAZWV website. The EAZA Executive Office can assist with providing access to the Veterinary Committee Member Area pages of the EAZA website. The full procedure of VA appointment is displayed in Figure 2 below.

The EAZA Veterinary Committee will assist in matching suitable candidates with vacant VA positions. The EAZA Veterinary Committee also provides general oversight of the Veterinary Advisors, regularly reviews and updates the-VA role description and guidelines, and provides advice on cross taxonomic issues.

All forms/templates are available to download on the EAZA Member Area.



### Procedure for appointing EEP and TAG Vet Advisor

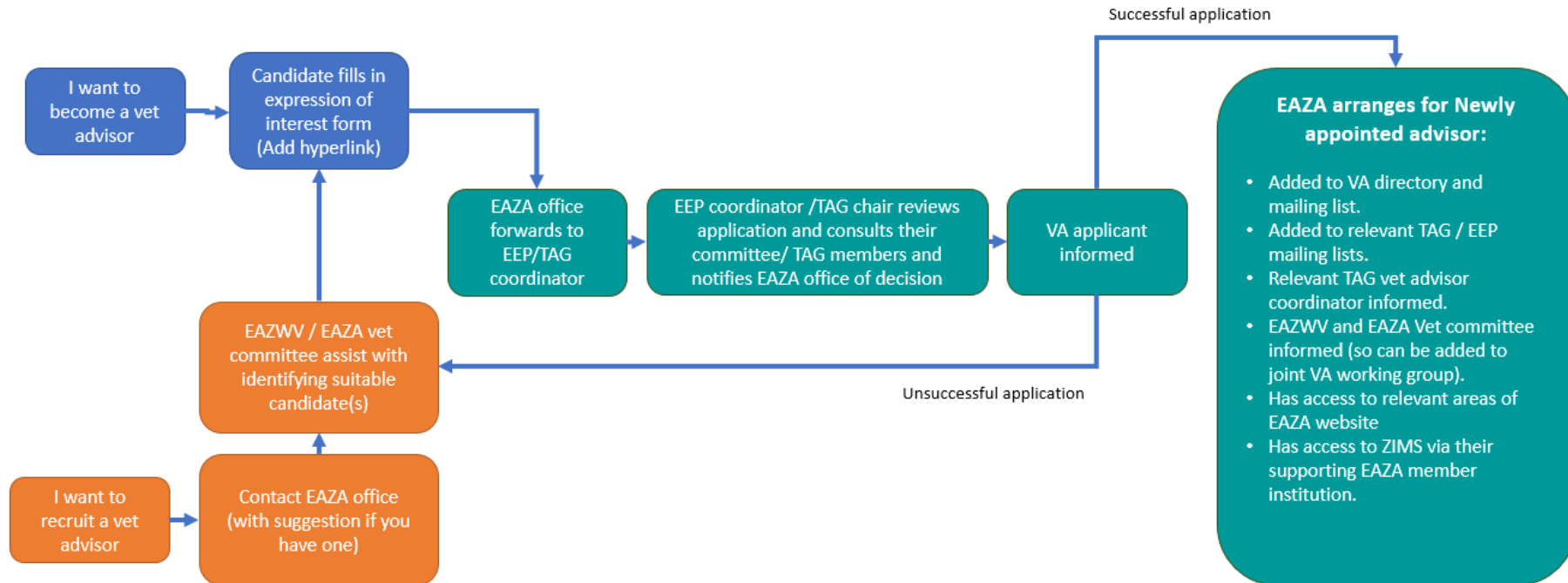


Figure 2 Procedure for appointing EEP and TAG Veterinary Advisors

All forms/templates are available to download on the EAZA Member Area.



### **The TAG/ EEP Veterinary Advisor and medical information**

In order to successfully perform their duties, EEP and TAG VAs must have access to relevant medical information pertaining to the animals that are managed under the umbrella of the TAG or EEP. Without access to such data, Veterinary Advisors cannot contribute to the overall aim of healthy population of individuals with positive animal welfare within the EAZA community. EAZA has set out rules and procedures about the ownership, confidentiality and use of data obtained by TAG and EEP Veterinary Advisors. These rules are outlined in [3.8.5 Veterinary Advisors](#)

### **Vet Guidelines Directory**

A directory of veterinary guidelines and documents has been set up to increase the dissemination of guidelines and documents among veterinarians on the ground. The Vet Guidelines Directory can be accessed [here](#).

### **More information on EAZA Veterinary Advisors**

More information on the VA role, how VAs get appointed, what tools are available to VAs, and how the EAZA Veterinary Committee and joint EAZA/ EAZWV subgroups support this can be found in more detail in the EAZA Vet Advisor Resource Manual which is available on the EAZA Member Area.

## Appendix 16: What is a Long-term Management Planning Meeting?

One of the major tasks of the EEP Coordinator and EEP Species Committee is to consider the roles and goals for the population as set into RSP process and to ensure that the EEP is on track to reaching these. This means that the status and trends of the EEP population need to be monitored at regular intervals as a basis for the formulation of management measures. For more information about this, see also [section 3.9 Long-Term Management Plan \(LTMP\)](#) in the EAZA Population Management Manual.

Population biologists from the Population Management Centre (PMC) team at the EAZA Executive Office are available (schedule allowing) to assist EEP coordinators with producing a Long-Term Management Plan by facilitating a meeting for your EEP. We recommend meeting with the EEP Coordinator, EEP Species Committee, TAG Chair, EEO TAG Liaison, and any other EEP advisors, *in situ* representatives or institutional representatives that may be relevant. Size and format of the meeting will depend on the roles and goals of the EEP and the needs of the population, EEP participants and relevant other stakeholders when applicable.

### Default meeting agenda (to be adjusted as required):

1. Presentation introducing the LTMP process
2. Presentation(s) on the *in situ* status of, and threats to, the species
3. Presentation(s) on the *ex situ* status of the species
  - a. The history of the EEP (by the EEP Coordinator)
  - b. Overview of species holdings in different zoo regions (where relevant)
  - c. Defining the EEP population
  - d. Clean up and data quality issues for the EEP population/pedigree assumptions/last minute updates
  - e. Taxonomic issues (in and/or *ex situ*)
  - f. Demographic status of EEP population
  - g. Genetic status of EEP population
4. Determine, or confirm from RSP, the role of *ex situ* management for the EEP
5. Determine the genetic and demographic goals for the EEP
6. Strategies and actions for the EEP to reach its genetic and demographic goals
  - a. Reproductive planning



- b. Overcoming current challenges: husbandry, veterinary, socio-behavioural, veterinary, research and data collection etc.
7. Strategies and actions to fulfil other roles of the EEP (education, training, fundraising, other *in situ* support, etc).
8. Working relationships among partner organisations within the EEP (where relevant, in case of non-EAZA partner organisations)
9. (Non-)Breeding and Transfer recommendations for individuals/individual groups (where relevant)
10. Post-workshop follow up

#### Post-meeting process:

1. The PMC team at the EEO will write draft and send to EEP Coordinator for review within one month after the LTMP meeting.
2. Draft will be reviewed by the EEP Coordinator and Species Committee and any other meeting attendees if relevant, to be completed within one month after receiving the draft LTMP. The PMC team at the EEO and EEP coordinator will work on the comments received during the draft comment period to create a final version of the LTMP.
3. Following from the review process, the approved version will be shared with all programme participants and placed on the TAG section of the EAZA member website.

#### **Preparing for a Long-term Population Management Planning Meeting**

1. Contact the EAZA Population Management Centre (PMC) Manager to request a meeting.
2. EAZA PMC contacts you if a LTMP can be scheduled for your programme in the following year.
3. Send in your studbook, or agree to PMC accessing your ZIMS studbook, for help with data validation and plan a date for a first call with the PMC
4. First call with the PMC to determine LTMP process, aims and scope of the meeting, attendees, etc.
5. Review your data validation packet received, containing a list of data issues that may need to be addressed. If your population has a partially unknown pedigree, investigate the list of individuals with unknown pedigree included in your validation packet.
  - a. For all individuals with UNK parents – consider whether any of these unknown parents may have been wild caught or potentially related to any other animals in the population.
  - b. With the help of the PMC, create a list of pedigree assumptions to be made and create a ZIMS analytical overlay or, in case of a SPARKS studbook, an analytical sparks dataset.



6. Where relevant, collect wants and needs from every EAZA institution (and non-EAZA EEP participants) holding your species and share these two weeks before the meeting with the PMC.
  - a. Ask each institution what they want or need in the coming years, as far as breeding, holding, transferring out, or receiving animals (the PMC can provide a template survey form).
  - b. Create a list of all animals that are unable to breed (e.g., due to old age, sterilization, health issues, etc.).
  - c. Gather information about the exhibits, social groups, or other species-specific information that may be helpful to you.
7. One month before the meeting:
  - a. Have your studbook database updated (based on the validation packet) for a preliminary analysis.
  - b. Provide PMC with
    - i. A list of all institutional wants and needs.
    - ii. A list of all animals to be excluded from the genetic analysis because they are unable to breed (again) (e.g., due to old age, sterilization, health issues, etc.). Include the studbook number, current institutional mnemonic, and reason for exclusion.
    - iii. A list of all EEP participants, including their name, mnemonic, institutional name, and email address. This will be included in the plan as a contact list.
    - iv. A list of the expected meeting attendees.
8. At meeting, bring along with you any last-minute updates for the studbook database.



## Appendix 17: System of EEP Monitoring

This appendix provides an example of the so called System of EEP Monitoring (SEM) for the purpose of understanding the main set up of the spreadsheet.

**Please note that TAG (Vice) Chair(s) can request a template of the spreadsheet in MS Excel from the EAZA Executive Office.**

SEM is a spreadsheet developed for TAG (Vice) Chair(s) to support routine monitoring of the functioning of the EEPs under the umbrella of the respective TAG. In addition, SEM must be completed by the TAG and submitted to the EEP Committee every five years in conjunction with the TAG Evaluation (see section 3.15). Input of information into SEM should come from both EEP Coordinators and the TAG (Vice) Chair(s).

<b>System of EEP Monitoring (SEM) - Example</b>			
<b>Information type</b>	<b>EEP I</b>	<b>EEP II</b>	<b>EEP III (etc.)</b>
EEP - common name			
EEP - <i>scientific name</i>			
Year EEP established			
Coordinator (name)			
Coordinator since			
EEP Hosting Institution			
Year completion Introduction to EAZA Ex Situ Management Course	If not, why not?	If not, why not?	If not, why not?
Vice Coordinator (name)			
Vice Coordinator since			
Vice coordinator (Institution)			
Year completion Introduction to EAZA Ex Situ Management Course	If not, why not?	If not, why not?	If not, why not?
Date of last studbook edit in ZIMS			
Is an EEP page available			
Role(s) as of last RSP			
Last LTMP check-in with EEO			
LTMP completed? N / Date	N/Y+date	N/Y+date	N/Y+date
Progress of PM role(s) / targets set	On track y/n	On track y/n	On track y/n
Progress of remaining role(s) / targets set (e.g. funding raised, research, education results)	On track y/n	On track y/n	On track y/n
Date most recent (non) breeding and/or transfer recommendation issued to a <u>single holder</u>			
Date most recent (non) breeding and/or transfer recommendation issued to <u>all holders</u>			



Date most recent other communication to a <u>single holder</u>			
Date most recent other communication to <u>all holders</u>			
Are there any non-EAZA facilities part of your EEP that have not been formalised as part of the official procedure? (if yes, which ones)			
Species Committee in place since	if no SC, why not?	if no SC, why not?	if no SC, why not?
Current number of SC members			
Date most recent communication SC; sufficient feedback? Y/N			
Last SC meeting held (date, place)			
Date publication Best Practice Guidelines	if not available, why not?	if not available, why not?	if not available, why not?
Concern(s) expressed about holder(s) (name, subject and date)			
Concern(s) expressed about Coordinator (name, subject and date)			
Is there an EEP endorsed conservation project? (Y/N)			
If yes, add project name/country			
Last participation of EEP Coordinator at (Mid-Year) Meeting			
<b>Conclusion EEP Coordinator</b>	Good/sufficient / insufficient /unacceptable	Good/sufficient / insufficient /unacceptable	Good/sufficient/ insufficient /unacceptable
<b>Overall Comments EEP Coordinator</b>			
<b>Key points of feedback from holders as part of formal EEP evaluation process</b>			
<b>Conclusion TAG Chairs</b>	Good/sufficient / insufficient /unacceptable	Good/sufficient / insufficient /unacceptable	Good/sufficient/ insufficient /unacceptable
<b>Overall Comment TAG Chairs</b>			
<b>TAG Recommendations and follow up actions</b>			



## Appendix 18: EAZA Guidelines for Animal Transfers between Regions

The guidelines in this appendix are based on agreements made by the WAZA Committee for Population Management (at that time called CIRCC). Whilst the guidance is meanwhile somewhat dated, these still provide good general principles to consider when transferring animals between different regions. More intensively managed species across two or more regions and the one plan approach were not considered yet when these guidelines were developed. The rules and procedures for EAZA Coordinators, EEP Species Committees and EEP participants on the importation and exportation of EEP animals into/out of the programme are laid down in [chapter 3.14.4 Placement of animals out of the EEP](#) or for EAZA Members in case of non-EEP species in [chapter 4 Institutional population management](#) of the Population Management Manual.

Prior to the transfer of an animal from one region\* to another:

Both sending and receiving institutions are responsible for ensuring:

- That the transfer is endorsed by the Coordinator of the relevant species management programme\*\* operating in their own region, where such a programme exists
- That the proposed transaction is not counter to recommendations made by the relevant Advisory body\*\*\* in their own region (for example, a Taxon Advisory Group)
- That the counterpart institution has confirmed the same for its own region.

Prior to endorsing the transfer of an animal out of or into a species management programme, the Coordinator of the species management program is responsible for determining:

- That the transfer of the animal is not detrimental to the species management program.
- That the transfer of the animal is endorsed by the Coordinator of the relevant species management program in the other region, where such a program exists.

\* A 'region' is a geographic area represented by a WAZA-recognised regional (or national) zoo and aquarium association.

\*\* A species management programme is a programme for the coordinated management of the taxon across the relevant region, endorsed by the relevant regional association.

\*\*\* An Advisory body is one run under the auspices of, or endorsed by, the relevant regional association.



## **Practical implications of the Inter-Regional Acquisition & Disposition Policy Institution in Region A – sender Institution in Region B – receiver**

### Scenario 1: No programme / Programme

#### Sending institution:

- checks with relevant TAG, RSP, Association that the move is not contrary to regionally agreed strategy.
- seeks assurance from receiving institution that the transfer is endorsed by program in receiving region.

#### Receiving institution:

- seeks endorsement from programme Coordinator in receiving region.

### Scenario 2: Programme / Programme

#### Sending institution:

- seeks endorsement from programme in sending region.
- seeks assurance that receiving institution has done same.

#### Programme Coordinator in sending region:

- informs both sending institution and programme Coordinator in receiving region of endorsement of the transfer.

#### Receiving institution:

- seeks endorsement from programme Coordinator in receiving region
- seeks assurance that sending institution has done same.

#### Programme Coordinator in receiving region:

- informs both receiving institution and programme Coordinator in sending region of endorsement of the transfer.

### Scenario 3 Programme / No Programme

#### Sending institution:

- seeks endorsement from program Coordinator in sending region.

#### Receiving institution:

- checks with relevant TAG, RSP, Association that the transfer is not contrary to regionally agreed strategy
- seeks assurance from sending institution that the transfer is endorsed by program in sending region.

All forms/templates are available to download on the EAZA Member Area



#### Scenario 4 No Programme / No Programme

Sending institution:

- checks with relevant TAG, RSP, Association that the move is not contrary to regionally agreed strategy
- seeks assurance that receiving institution has done same.

Receiving institution:

- checks with relevant TAG, RSP, Association that the transfer is not contrary to regionally agreed strategy seeks assurance that sending institution has done same.

All forms/templates are available to download on the EAZA Member Area



## **Appendix 19: EAZA Guidelines for decision making and due diligence, including when importing EEP animals from the wild**

*This is a place holder for guidelines that are under development by the EAZA Wildlife Trade Task Force.*



## Appendix 20: EAZA Template Programme Annual Report

[Common Name (*Scientific name*)]

**Programme annual report** YYYY

**Programme Coordinator:** (name and institution of Coordinator.)

**Date of last species committee election:** (YYYY-MM-DD)

**Species committee members:** (list of names and institutions of committee members)

**Programme advisors:** (list names and institutions of appointed programme advisors e.g. Veterinary Advisor, conservation advisor etc.)

**Meetings during the year:** (YYYY-MM-DD and location)

**Latest Long-term management plan published:** (YYYY)

**Latest studbook version published:** (YYYY)

**EAZA Best Practice Guidelines:** (last name, first name initials of author (YYYY): title. *journal*. volume. pages.)

**Publications:** (last name, first name initials of author (YYYY): title. *journal*. volume. pages.)

**Programme (EEP) evaluation:** (please indicate when the last evaluation of your EEP took place.)

**Veterinary activities:** (to be filled in together with the Veterinary Advisor; information on relevant activities, outcome of undertaken studies, current diseases and medical issues of attention.)

**Conservation activities:** (information on recent activities, collaboration with conservation organisations and useful links.)

**Research activities:** (information on recent activities, collaboration with research bodies and useful links.)

All forms/templates are available to download on the EAZA Member Area



**Status and developments in the programme population in YYYY:**

(Excel version available on EAZA Member Area includes formulas for cross check. Availability for direct download from ZIMS for Studbooks is expected for 2019)

Institution	Status (YYYY-MM-DD)			Births			Did Not Survive (DNS)			Transfer EAZA in			Transfer EAZA out			Transfer Non-EAZA in			Transfer Non-EAZA out			Deaths			Status (YYYY-MM-DD)		
	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U
Zoo A	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo B	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo C	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo D	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo E	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo F	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo G	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo H	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo I	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Zoo J*	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	<b>Total</b>		
																									<b>0</b>	<b>0</b>	<b>0</b>
																									Cross-check		
																								0	0	0	

\*Non- EAZA participants should be marked with \*

All forms/templates are available to download on the EAZA Member Area



**Programme Summary:** (summary of programme activities during the year incl. achievements, progress in actions linked to LTMP, problems and recommendation for the next year(s)).

**Notes:** (Additional notes)

**Status and developments in the EEP population in YYYY:** please see the Excel template or use the table below

Institution	Status (YYYY-MM-DD)			Births			Did Not Survive (DNS)			Transfer EAZA in			Transfer EAZA out			Transfer Non-EAZA in			Transfer Non-EAZA out			Deaths			Status (YYYY-MM-DD)			
	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	M	F	U	
Zoo A	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo B	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo C	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo D	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo E	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo F	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo G	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo H	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo I	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Zoo J	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	<b>Total</b>		
																									<b>0</b>	<b>0</b>	<b>0</b>	
																										Cross-check		
																										0	0	0

All forms/templates are available to download on the EAZA Member Area



**Summary:** (summary of programme activities during the year incl. achievements, problems and recommendation for the next year(s))

**Notes:** (Additional notes)



## Appendix 21: EAZA Fundraising Account Application

### Introduction

This application is for use when TAGs are looking to raise and distribute funds to relevant conservation, research and /or education projects and would like these funds to be 'housed' within the EAZA accounts and administrated by the Executive Office. It is the responsibility of the TAG to discuss this possibility with their Executive Office liaison and complete this application form. The liaison has the responsibility to send agreed applications and any supporting documentation to the Executive Director for consideration. The Executive Director will consider applications in the light of other funds, expected workload for the Office Manager, and overall EAZA financial set-up.

In applying to set up a fund using EAZA accounts, and to satisfy audit requirements, the TAG agree to provide EAZA with an annual overview of:

- Project application format
- Project selection criteria
- Grant agreement between TAG and selected project/institution
- Project update(s)
- Project evaluation criteria and/or project evaluation report
- Confirmation that the supported projects are entered into the EAZA Conservation Database

The EAZA Executive Office agrees to:

- Provide an annual overview of projects/institutions that have been awarded grants to and the associated amount
- Provide fund totals, up to 12 times per year as requested
- On request, provide a template invoice for use when requesting donations
- Make payments to projects as directed by the TAG identified main contact person.

**Grant agreements and/or commitment of funds can only be authorised by the EAZA Executive Director. Signature of agreements by anyone other than the EAZA Executive Director results in the liability for payment moving from EAZA to the person signing.**

All forms/templates are available to download on the EAZA Member Area



## **Application**

**Name of applying TAG:**

**Date of application:**

**Name of main contact person:**

*(Payable grants can only be requested by contact person)*

**Email of main contact person:**

**Fund name:**

**Fund start date (mm/yyyy):**

**Fund end date (mm/yyyy):**

**What is the purpose of the fund?**

*(Approximately 500 words)*

**Estimated total amount of donations to fund per year (Euro):**

**Estimated total amount of grants given out per year (Euro):**

**Frequency of update about the account balance needed:**

*(Tick appropriate option)*

1x per month

1 x per quarter

1 x per year

On request of the contact person (maximum 12 requests per year)

**Signature main contact person:**

**Date:**

**Signature EAZA Executive Director:**

**Date:**

*Signed copies to be held by contact person and EAZA Executive Director.*



## Appendix 22: Guidelines for independent EAZA-related social media managers

Communications Committee, January 2026

### INTRODUCTION

Social media is a powerful tool for communicating between groups and to the public. In many places social media is now the top place for news, and the main space where people spend their time.

As such, it can be used by EAZA groups such as TAGs to share important information and news stories among themselves, or to inform the public about their work and to engage with various audiences.

At the same time, social media can also be problematic. The shareable nature of social media means content can be easily reach unintended audiences; a lack of contextual information can lead to miscommunication and controversy is an in-built part of the design of social media platforms. Additionally, keep in mind that automatic translation tools, available on social media, can lead to unwanted misunderstandings and wording that may seem innocuous in one language may be more inflammatory in another.

These guidelines are aimed at assisting the TAGs, Committees and similar EAZA groups to decide whether they have a need to run their own social media channels and if so, how to set up their channels successfully.

You are strongly encouraged to read them before starting your social media channel and to involve a communicator from one of the participating institutions in the process (e.g. a communicator working at the institution coordinating the EEP you'd like to set up a page for). They can provide valuable input on general enquiries and in case of a crisis.

**BEFORE SETTING UP YOUR CHANNEL, PLEASE NOTIFY THE EAZA COMMUNICATIONS TEAM, VIA [info@eaza.net](mailto:info@eaza.net).**

Social media is increasing in scope, and there will always be new platforms to explore and utilise. Each major channel has its own characteristics and uses. Some factors to consider:

- Creating communities – platforms such as Whatsapp and Telegram are widely used for private messaging. These are increasingly places of communities where announcements can be made to specific groups.
- Authenticity – speaking with an authentic voice and being true to your values and who you are is increasingly valued by social media audiences. Users should try and speak with a consistent voice to find their audience.

All forms/templates are available to download on the EAZA Member Area



- Continuous updates – social media are ever-changing. Regular reviews are needed to ensure that you are still using the most appropriate channel and that your page/group's settings have not been modified.

In this document, you will find general principles relevant to most platforms, as well as some specific elements applicable to LinkedIn, Facebook and Instagram (as of January 2026). Of course, there are many more platforms available and new ones will emerge over time.

If you have no **clear plan with set objectives for your channel** or if you cannot generate enough content to keep your audience's attention, **we recommend** using existing channels including Zooquaria articles, the eNews or the EAZA social media channels. Remember that administrating a Social Media channel takes time and energy.

If your goal is to **raise awareness of your work among colleagues** in the EAZA community, we **recommend LinkedIn** as the main platform suitable for EAZA-related channels as Facebook has seen a reduced number of users in the past few years and Instagram is based on visual content.

**BEFORE SETTING UP YOUR CHANNEL, PLEASE NOTIFY THE EAZA COMMUNICATIONS TEAM, VIA [info@eaza.net](mailto:info@eaza.net).**

## GENERAL PRINCIPLES FOR ALL PLATFORMS

### 1. Setting your objectives

All communications should have a clear goal in mind. Before setting up your new channel, you should review carefully who you want to speak to and why.

**Who?** Knowing your main target audience helps determine the best platform and streamline your content. Do you want to connect with fellow zoo experts or reach animal lovers in general?

**What?** Are you planning to share sensitive content whose accurate understanding requires background information? Is your content text-heavy or based on pictures and videos? Would you like several people to be able to share content?

**Why?** Are you raising awareness of something or trying to build a community? Are you looking for bilateral knowledge exchange or unilaterally spreading information?

If you have no clear reason to set up a channel or if you cannot generate enough content to keep your audience's attention, **we recommend** using existing channels including Zooquaria articles, the eNews or the EAZA social media channels. Remember that administrating a Social Media channel takes time and energy.

### 2. Page identity

All forms/templates are available to download on the EAZA Member Area



**Be clear about the name of your group:** If you are the Terrestrial Invertebrate TAG, call your page “EAZA Terrestrial Invertebrate TAG” to avoid confusion.

**Write a description:** create a short text that describes the purpose of the page/group and the target audience, e.g. “Welcome to the EAZA Canid & Hyaenid Facebook group, primarily for EAZA zoo employees to discuss, share and disseminate information about canids & hyaenids and their management in EAZA zoos, wildlife and safari parks. Other interested parties who are not from EAZA zoos are welcome but need to adhere to the group rules.”

### 3. Setting your channel parameters

Once you have selected the platform and best public/closed option for your page/group, you also need to consider other parameters that can be turned on or off:

**Commenting?** Do you want readers to leave comments on your posts? Will you have time to answer them?

**Posting?** Would you like to allow any page subscriber to add content?

**Profanity? If public, we strongly suggest** that you set terms for the Profanity Filter. This allows you to avoid constant attention from anti-zoo activists and trolls. You can do this later, tailoring your moderation terms to exclude any comments you don't want to appear.

**Who's managing your channel? Administrators** oversee the channel and have all the rights. They can change the settings, add and remove content, add editors and so on.

**Editors** can add and remove content, reply to comments but cannot add further editors or change parameters.

**House rules?** Consider posting house rules for your page/group so that every member knows where they stand and to prevent problematic situations.

For example, the rules of the EAZA Communicators' Network are:

- **Members only:** This group is reserved for staff member of EAZA organisations. Please answer all the questions when joining the group so that moderators can approve your request more easily. Thanks!
- **Be kind and courteous:** We're all in this together to create a welcoming and safe environment. Let's treat everyone with respect. Healthy debates are natural, but kindness is required. Bullying of any kind or degrading comments about things like race, religion, culture, sexual orientation, gender or identity will not be tolerated.
- **Respect group members' privacy:** We do not accept any activity which compromises group members or EAZA Member institution employee's personal information.
- **Comply with your own institution's socials policy:** We advise you to be familiar and comply with your own institution's social media policy regarding the content of your posts. You are responsible for all the content you post. EAZA will not be responsible for any claims resulting from content that you upload.



- **Opinions of EAZA:** Please note that posts and comments on this page do not necessarily reflect the opinions of the EAZA.

#### 4. Content

Once your channel is set up, you can start posting. Here are some reminders:

- Remember your objective and only post content if it supports your mission.
- Dedicate time to approve posts from others (if set up as such), reply to comments and moderate unwanted behaviours in a respectful manner.
- Ensure that no controversial viewpoint is represented as the official viewpoint of EAZA.
- Remember that you represent EAZA. You are therefore one of the voices of the entire community of progressive zoos and aquariums in Europe and Western Asia. If you have any doubt as to whether your post is appropriate for EAZA, please contact the EAZA Communications Team via info@eaza.net.
- Contact the EAZA Communications Team if your page is getting constant negative activity. Make sure the content you use is not subject to copyright, or that you have been given permission to use it. It is good practice to always attribute the visuals to their authors.
- For public pages/groups: When using visuals of people holding / in close proximity to animals, prioritise shots where the person is wearing the zoo / aquarium uniform and the necessary protective gear (e.g. gloves), and always provide a context (e.g., trained professionals conducting welfare checks, training, transport, etc.) to avoid giving the false impression that anyone can do it or that these animals are pets.

### SELECT YOUR SOCIAL MEDIA PLATFORM

Platform	LinkedIn (LI)	Facebook (FB)	Instagram (IG)
<b>Active users</b>	Growing from 660 million in 2021 to over 1.1 billion in 2025. <b>Europe hosts over 304 million users</b> (vs 326 million in Asia and 234 in America) <a href="#">[ref]</a>	Decrease from 2.8 in 2021 to 2.28 billion in 2025. <b>Europe hosts over 268 million users</b> , while 1.5 billion are located in Asia and America <a href="#">[ref]</a>	Increased from 1 billion in 2021 to 1.74 billion in 2025. <b>Europe hosts over 245 million users</b> (vs 491 million in America and 888 million in Asia). <a href="#">[ref]</a>
<b>Benefits</b>	Has a more professional approach and less advertisement. Enables to build a network of users with a strong interest in what you do. In 2025, anti-zoo activists or trolls causing trouble to channel's communications	Remains one of the most widely used social media platforms globally, especially in people over 35 years old (in 2025).	Users aged 18 to 34 make up nearly two-thirds (64.6%) of the platform's global adult audience. It is based on visuals and short-form videos, so great to share beautiful pictures or videos of animals or infographics.



	still don't seem active on LinkedIn. You can share PDFs that are readable on the platform.		Possibility to collaborate on posts with other accounts and reach their followers.
<b>To consider</b>	It may be more difficult to reach the general public on LI, as it still has its original "professional networking platform" reputation. Journalists are quite active on this platform.	Organic content gets lost in a lot of adverts. Algorithms don't favour closed group content, so that comes lower on your followers' feed. Anti-zoo activists / trolls are very active on FB.	The visible caption is short and risks being overlooked if your visual doesn't catch the attention of the follower. No clickable links in captions. Followers don't have the possibility to post on your account. IG is more adapted to unilateral transmission of information.
<b>Channels</b>	Offers public page and private (closed) group options	Offers public page, public group and private (closed) group options	Offers public or private accounts.

**We recommend** that you create a group rather than a page if you wish to control who can read your content.

<b>Feature</b>	<b>LI/FB/IG public pages</b>	<b>LI/FB private groups</b>	<b>IG private account</b>
Purpose	Promote your work with text, images or videos	Foster discussions	Promote your work with images or videos
Audience	Anyone can follow	Members must be approved	Members must be approved
Member interaction	Readers can use reactions and comments on your posts; if set up followers can also post on the page without admin's approval (no approval step possible)	Members can post (admins' approval can be set up) and interact with each other	Readers can use reactions and comments on your posts
Management	Multiple admin, assign roles	Multiple admins, assign roles	One admin
Analytics and Insights	Admin and editors	Admin	Admin

All forms/templates are available to download on the EAZA Member Area



Examples:

The [EAZA Terrestrial Invertebrate TAG](#) runs a private (closed) Facebook group, primarily intended for zoo staff to keep them up to date with developments in the TITAG but also invertebrate news, articles and publications from across the globe. Members need to request access to join the group and view its content.

The [EAZA Caprinae TAG](#) runs a public Facebook page that aims to raise awareness of the different species of caprines and inform about the conservation work done by TAG members. Anyone can see all the content at any time.

The [EAZA Chimpanzee EEP](#) has a public account on Instagram. It presents the EEP's work with a focus on science facts, welfare, conservation, and respecting natural behaviour of chimpanzees. Anyone can see all the content at any time.

The [EAZA Wetlands for Life campaign](#) team is using a public LinkedIn page to promote campaign participants and their activities that support the campaign's goals.

**PLEASE NOTE CAREFULLY**

- 1. Any information on the EAZA Member Area is confidential and for the use of Members of EAZA only. You may not share any such information on any channel without the express permission of the Executive Director of EAZA.**
- 2. Advertising animals via social media groups is not allowed.**



## Appendix 23: Sanctions in the case of a violation of the EAZA Code of Ethics and Conduct, EAZA Standards, or EEP Procedures

Approved by EAZA Annual General Meeting, 16 April 2026\*

*\* Please be aware that the 'Sanction in the case of a violation of the EAZA Code of Ethics and Conduce, EAZA Standards, or EEP Procedures is a standalone document that is merely included as appendix to the PMM for ease of reference.*

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In the case of a violation of the EAZA Code of Ethics and Conduct, EAZA Standards, or the EEP procedures as laid down in the EAZA Population Management Manual, three levels of sanction can be imposed by the responsible bodies of EAZA:

- Warning
- Restricted status
- Termination

### I. Warning

A warning can be given to an EAZA Member institution by the EEP Committee, Membership and Ethics Committee, or Conservation Committee for one or more of the following reasons:

1. Not following recommendations from EEP coordinators for animal transfers between officially approved EEP participants, including both EAZA and non-EAZA EEP participants;
2. Claiming or accepting money for an EEP animal;
3. Transferring, importing or releasing an animal into, within or from the EEP population without the knowledge and approval of the EEP Coordinator;
4. Repeatedly not responding to requests from the EEP coordinator within a time period of three months;
5. Categorically and/or repeatedly not following EEP breeding recommendations, EEP non-breeding recommendations or EEP husbandry recommendations;
6. Other violations of EEP rules as set out in the EAZA Population Management Manual (PMM);
7. Not keeping appropriate records as designated in the EAZA Standards for Welfare, Accommodation and Management of Animals in Zoos and



- Aquariums (2024); non-participation in ZIMS (and/or Species360 membership) or not updating ZIMS data in the preceding six months;
8. Violations of the EAZA governance and constitutional documents including the Code of Ethics and Conduct or EAZA Standards including but not limited to violations which harm the community's common interests regarding animal care, EEPs, or conservation activities and reporting, or animal exchanges, or harm other Members or their image or the image of EAZA.

Warnings are registered by the EAZA Executive Office (EEO) and Council is notified about each warning. The warning comes into effect on the date indicated in the communication from the EEO to the Member. Warnings are subsequently communicated to the whole Membership via mailing to Coordinators and in the next eNews.

The Member institution shall rectify or resolve the problem(s) that led to the warning within six months of the warning being issued. If the problem(s) that have led to the warning are not capable of being rectified or resolved the Member institution shall provide the respective Committee with a written statement setting out (i) the measures that have been taken to mitigate the risk of a similar issue occurring in the future and (ii) which root causes have been addressed to eliminate or reduce the risk of recurrence. The respective Committee Chairs, through their EEO liaisons, will follow up with the Member prior to the six-month requirement to assess progress. The Committee shall review and discuss the status of the rectification or resolution (or, where applicable, the mitigation measures taken) and the response of the Member at its next scheduled meeting of the Committee following the six-month deadline. The respective Committee will then discuss whether the problem(s) that have led to the warning have been sufficiently rectified or resolved or whether a new warning should be imposed due to the failure to rectify or resolve the issue within the six month period.

Warnings are automatically purged five years after they have been issued. The exception to this is if Restricted status is imposed on a Member; in which case the warnings are purged at the end of the Restricted status period.



### Restricted status

Restricted status can be imposed on an EAZA Member institution by the Executive Committee for the following reasons:

1. Following three official warnings from the EEP and/or Conservation and/or Membership and Ethics Committees;
2. Severe violations of the EAZA Code of Ethics, or EEP rules (examples of severe violations are actions which are not in line with animal welfare or nature conservation regulations or irresponsible outplacings of animals).
3. If a member has not rectified or resolved the problem(s) that led to a warning within six months of the warning being issued or, insofar as the problem(s) that have led to the warning are not capable of being rectified or resolved by the Member institution, it cannot reasonably be concluded that the member has complied with the obligation to provide the Committee with the above-mentioned written statement.

For purposes of determining whether three warnings have accumulated, warnings are counted cumulatively across all three Committees (EEP, Conservation, and Membership and Ethics).

Restricted status lasts for two years and is registered by the EEO and communicated to the EAZA membership as well as to Coordinators. Relevant partner organisations are also notified.

Members with Restricted status:

1. cannot be Council members;
2. cannot have, or provide institutional support to, any other functional roles in EAZA (e.g. host an EEP, support EEP (Vice) Coordinators, TAG (Vice) Chairs, Veterinary Advisors);
3. cannot be members of EAZA bodies (e.g. EAZA Council, EAZA Committees, EAZA Working Groups, EEP Species Committees, TAGs, etc.);
4. cannot attend any EAZA meetings with the exception of the Annual General Meeting;
5. cannot acquire new EEP species;



6. will lose recommendations for any new EEP species that might have been made prior to the Restricted status that have not yet been transferred;

7. do not have access to the Member Area of the EAZA website.

Members with Restricted status are still required to follow all EEP rules for the EEP animals they have already.

Restricted status will be lifted by the Executive Committee after two years if all of the following criteria are met:

- the Member cooperates fully with the Executive Committee and] EEP(s);
- the Member has not received or does not receive any new warnings;
- the Member provides written confirmation that they commit to following EAZA Codes, Standards and procedures are not aware of any incidences where these may be in violation; and
- the EEP-, Conservation-, and Membership and Ethics Committees recommend to the Executive Committee that the Member should be brought back to Full Member status and confirm they have no other warnings or ongoing complaints against them.
  - If the Committee responsible for the underlying subject matter does not support the reinstatement of the Restricted Member to Full Member, the Committee Chair will submit a detailed report on why this is the case.

The final decision to change the membership status stays with the Executive Committee. The Executive Committee considers the criteria above, including the recommendations from the committees, in the meeting prior to the deadline of Restricted status ending and decides if the Restricted status can be lifted as per the two-year deadline date.

If there is a complaint against the restricted Member or if there are new concerns that require an investigation, then the Executive Committee can decide to extend the Restricted status until the complaint is resolved. If and when the deadline of the Restricted status ends:

- A letter will be sent to the Member with Restricted status to say that they will be reinstated by date X provided no new concerns arise by that date;
- The Executive Director monitors the situation and if no further concerns are raised between the meeting prior to the deadline of Restricted status



ending and the deadline then a letter is written from the EAZA Chair to the Member to confirm that the Restricted status is lifted and the Member is returned to Full Member status.

- After the Member has been informed, the EAZA Executive Office leads on communicating with Coordinators, the EAZA membership and any relevant partner organisations who were previously notified of the change in status.

If the Member continues to violate the EAZA Codes of Ethics and Conduct, EAZA Standards and/or EEP rules or receives further warnings the Executive Committee will recommend the Member to Council for termination of membership.

### Termination

The Executive Committee can propose termination of membership to Council in the following cases:

1. Cancellation: When the Member has ceased to comply with the requirements for membership set out in the articles of the association, if they fail to fulfil their obligations towards the association or if the association cannot reasonably be required to allow the membership to continue;
2. Disqualification: When the Member acts in violation of the articles of association, bylaws or resolutions of the association or unreasonably disadvantages the association;

Specific examples would be (but are not limited to):

- Members with Restricted status who have not fully cooperated with the Executive Committee and the respective Committee(s) responsible for the underlying subject matter(s) or have not abided by the EAZA Code of Ethics and Conduct, EAZA Standards, or EEP procedures in the preceding two years;
- Severe and/or repeated violations of the EAZA Code of Ethics and Conduct, EAZA Standards or EEP procedures that go beyond situations for which the restricted status can be imposed and, which, in the judgement of the Executive Committee, justify termination of membership (e.g. illegal activities and action that damage the good reputation of EAZA).

All forms/templates are available to download on the EAZA Member Area



A termination is communicated to the whole membership and Coordinators. EAZA also informs the relevant EAZA Associate Member national zoo federation and requests that the federation informs the relevant national authorities. In case there is no EAZA Associate Member national federation, or no national federation, in the country concerned, EAZA shall request the relevant EAZA Council member(s) to inform the relevant national authorities. Terminated Members can apply for new membership after five years and must go through the full accreditation procedure.

### Appeal

Members have the opportunity to appeal decisions. Please see the relevant section(s) in the EAZA Membership and Accreditation Manual for further detail. Filing an appeal does not delay the imposition of the sanction, nor does it delay the communication of the sanction.

EAZA Members and other relevant stakeholders must:

1. follow the established complaint procedure outlined in the EAZA Membership and Accreditation Manual and/or Population Management Manual as appropriate, and await the decision of the appropriate committee(s) before submitting an appeal;
2. complete the appeal process as specified in the EAZA Membership and Accreditation Manual and/or Population Management Manual as appropriate; and
3. await the final outcome of such appeal process, before initiating or commencing any legal proceedings.



## Appendix 24: EAZA guideline on animal transport

The EEP Committee developed this 'EAZA guideline on animal transport' to provide the EAZA Membership with practical advice related to the transport of animals from, to and between zoos, in addition to existing EAZA policy documents such as the EAZA Code of Ethics and Conduct (2023) and the EAZA Standards for Welfare, Accommodation and Management of animals in Zoos and Aquariums (2024).

### Guidelines

#### 5. Fitness

Animals should only be transported when fit, which includes having a good health condition and at an appropriate age to be transported (e.g. after weaning in case of mammals). Any species that is close to giving birth/laying eggs should not be transported.

#### 6. Crates and means of transport

Appropriate crates, tanks, boxes, etc. that are suitable for the species (thereby taking individual characteristics into consideration) must be used. The transport system should be strong enough to contain the animals during the entire transport. The transport system should be designed to minimise stress and prevent any potential injury to the animal (such as inappropriate water buckets in the crate, screws and nails protruding into the crate, etc.). Appropriate bedding or other substrates should be provided when relevant and appropriate and contamination risks should be reduced as far as possible. Water quality needs to be considered for fish transports, e.g. addition of nitrate reducing solutions or life support systems, which should be designed for the species and length of transport. Staff involved in the animal transfers must be able to handle the transport containers safely. A wild animal notice and other appropriate labels e.g. for dangerous or hazardous animals, must be attached to all transport containers.

Although beneficial for some species, loading more individuals into one transport container is generally likely to increase stress as well the risk of injuries related to aggression of one or more animals, and should therefore be avoided unless the benefits clearly outweigh the potential risks.

The same conditions apply to the transport means (vehicle). If natural enemies (e.g. prey-predator species) are being transported in the same vehicle, the vehicle should have different compartments to avoid potential stress on either species.



#### 7. Conditions during transport

Depending on the species' needs and the means and distance of transport feeding and watering procedures should be considered. When necessary, feed and water should be applicable to the animal in a sufficient quantity, thereby taking potential delays into account on long distance transports. For other species e.g. fish, withholding food prior to transport is the appropriate strategy to avoid waste decreasing water quality.

The climatic and ventilation conditions during transport must meet the biological needs of the species as much as possible and at least guarantee the welfare of the animal(s) throughout the entire transport.

The zoo sending the animal(s) has to take care that the duration of the transfer is justifiable and that an adequate supply with food and water is guaranteed (where appropriate), even on longer trips. The transport route should be as direct as possible.

#### 8. Loading and handling

Safety of both species and staff needs to be considered when loading animals into or release them from the crate, tank, box or vehicle. Capture and restraint equipment should be appropriate for the species.

Crate training is recommended for species that are easily stressed during loading and/or transport. Also, large animals (such as hippos or rhinos) that are not easily loaded into a crate or animals for which immobilisation is a high risk (for example okapis) might benefit from crate training.

#### 9. Staff

Appropriate staff should be involved in preparing and (when relevant) accompanying the transport. All necessary permits (e.g. CITES) and other official paperwork need to be arranged prior to departure and copies need to be in possession of the transporter. The transporter must comply with any national legislation on licensing, speed limits, rest times, etc.

#### 10. Responsibility

The zoo sending the animal is responsible for choosing the right means for transport from "A to B". In case a third party is involved in the transport the sending zoo is responsible for the professional transportation of the animal. The sending zoo should also be informed about the route and the time table of the transport.



### 11. Communication

Communication with all relevant parties prior to, during, and after the transport is of crucial importance and all parties involved in the transport need to be aware of this and act accordingly.

### 12. Species-specific-guidelines

Further species-specific transport guidelines can be obtained from the IATA Live Animal Regulations and the transport procedures adopted by the Animal Transport Association (ATA), OIE and CITES. EAZA Best Practice Guidelines should also be referred to or the relevant EEP coordinator consulted for advice on more complex transports.



## Appendix 25: Position Statement on Management euthanasia/culling

Update approved by EAZA Council 26 April 2023

### Preamble

For the purpose of this document EAZA defines management euthanasia/culling as the removal of animals from a population in human care, for non-medical reasons, by humane killing carried out by appropriately qualified and experienced staff. In case of medical reasons, the term medical euthanasia is referred to.

EAZA defines humane killing as the absolute minimisation of suffering of the animal during the process of ending its life within the limits of the technology available and the opinion of recognised welfare science. Any management euthanasia/culling or medical euthanasia procedure by an EAZA Member must conform to the national legislation of the country in which it is located.

EAZA Members represent a broad range of cultures, legislative systems and opinions, and so it is recognised that population management techniques will differ across the EAZA region. Despite these differences, EAZA Members recognise that a common statement on management euthanasia/culling of animals is desirable, even if the practice is not currently open to some Members for legislative or cultural reasons.

This common statement in no way obliges any Member to undertake management euthanasia/culling; nevertheless, EAZA Members must take seriously their obligations to population management, and must take full and sole responsibility for any decision which damages the viability and health of the overall population of the species both within the institution and across the region under administration by the relevant breeding programme.

EAZA Members take seriously the responsibility for their animals' wellbeing while they are under their direct care, and every reasonable effort is made to ensure that when an animal moves to a different institution, this same level of responsibility is maintained by the receiving collection. EAZA Members will review the suitability of institutions to receive animals on a case by case basis according to relevant EAZA policies.

EAZA Members strive to ensure that their animals are held in appropriate, species specific circumstances that ideally enable the expression of as wide a range of



normal behaviours as possible. It is therefore important that they should be able to exercise the full range of normal and regular breeding behaviours on a natural cycle where rearing of juveniles forms part of that behaviour.

While EAZA Members are ethically obliged to maximise the physical and psychological wellbeing of individual animals in their care, their responsibility for the fulfilment of defined conservation goals and the viability of the overall population may, under certain conditions, take precedence over the right to life of specific individual animals. This reflects recognised in situ conservation practice, and notes that modern welfare science regards lack of life as a neutral position.

EAZA recognizes the challenges posed by discussion of management euthanasia/culling, even among scientifically educated experts; the Association also recognises the challenges of explaining best practice and the role of management euthanasia/culling in conservation to the public (see Methodology and Responsibilities below).

EAZA considers management euthanasia/culling to be standard operating procedure where:

The animal poses a serious and unavoidable threat to human safety, e.g. escaped animals

EAZA considers medical euthanasia to be standard operating procedure where:

1. In the opinion of the veterinary staff responsible for the individual animal's health and welfare, the animal is suffering from a disease, detrimental psychological state or severe pain and/or stress which cannot be adequately alleviated.

EAZA considers that management euthanasia/culling may be appropriate where:

The only alternative is permanent transfer to accommodation which cannot assure a proper level of welfare for the animal, and which cannot be improved within a short interval agreed by the responsible EAZA authority.

The continued presence of an individual animal is unreasonably disruptive to a functioning social group within an individual collection.

The maintenance of a population's demographic or genetic viability is at risk through the continued presence of one or more individual animals.



### Management euthanasia/culling as a management tool

The application of a considered management euthanasia/culling policy is appropriate on welfare grounds, at an individual and group level, and helps to mirror species specific population structures. Members are ethically obliged to strike an informed balance between the life of an individual and maintaining the long term viability of a managed population, and where these obligations are in conflict, the welfare and genetic health of the population both locally and regionally over the long term must

take precedence. EAZA considers management euthanasia/culling to be one of several appropriate methods for maintaining this precedence.

### Management euthanasia/culling for maintaining welfare and normal and natural behaviours

If a female's opportunity to breed and rear offspring regularly is limited, this may in some species result in the premature and permanent cessation of her reproductive cycle and/or abnormalities within her reproductive tract, all of which can compromise the health of that individual. In addition, limiting the opportunity to breed in species which display nurturing parental behaviour, by definition, reduces an individual animal's opportunity to express one of the most important and complex set of natural behaviours and can thus lead to a decrease in welfare.

EAZA considers management euthanasia/culling of offspring an appropriate tool for maintaining the welfare of parent animals provided that the procedure does not in itself compromise that welfare.

In addition, management euthanasia/culling is an appropriate measure where offspring numbers are unpredictable and large populations develop; where these numbers compromise the individual welfare of breeding programme precedent animals within the enclosure; and where animals may not be reasonably rehoused without negative consequences to the viability of the overall population.

Management euthanasia/culling for maintaining long term population viability EAZA and approved non-EAZA institutions can only provide a finite number of suitable enclosure spaces for the rehousing of animals not required for breeding. This therefore limits the number of offspring Members are able to suitably house

All forms/templates are available to download on the EAZA Member Area



without risk to the viability of the breeding programme. Priority for housing within enclosures should always be given to animals which can play a positive role in the success of the breeding programme, according to the goals set by Regional Species Plans and/or the EEP Coordinator.

#### Methodology and responsibilities

All options for disposition of animals not required for a breeding programme or collection must be reasonably considered on a case by case basis and a decision to carry out a cull will be taken by the relevant managers in the Member institution. Responsibility for this decision, even after consultation with external agents (e.g. EEP coordinators) lies exclusively with the Member institution. If the decision to management euthanize/cull an animal is taken, every institution must ensure that it will be carried out humanely as per the definition above.

Management euthanasia/culling is influenced by local customs and subject to local laws but should always be considered in preference to keeping animals under conditions which compromise animal welfare. Where the local culture and legislation do not allow the use of culling as an ex situ population management tool, EAZA

Members commit to plan the breeding of their animals according to the EEP coordinator's recommendations, and in case of surplus, to maintain their animals in good welfare conditions until an alternative and permanent appropriate solution is found. This must be done without jeopardising the work of EEPs and without using space that should be devoted to priority animals. Any decision to cull an animal belonging to an EEP must follow the relevant procedures outlined in the EAZA Population Management Manual.

In accordance with EAZA Standards, post-mortem examination should be performed and biological material preserved for research and gene conservation. The results of the post - mortem examination should also be passed to the relevant programme coordinator, and full records of any results and outcomes should be archived. Where local legislation allows, the culled animal can also provide enrichment for the institution's carnivores by being fed to them and increasing their welfare.

EAZA zoos will act judiciously according to the above principles and within their local laws and customs. Members commit to providing a full explanation and justification

All forms/templates are available to download on the EAZA Member Area



of these principles to the public and the media, whenever an inquiry is received (IE not only when there are high levels of media or public interest in a specific case). Members undertaking culling for management purposes have a responsibility to explain the practice to the public in terms that are both scientifically correct and reflective of public sensibilities. Members not undertaking culling for population management also share the responsibility to explain the scientific basis for the practice within the terms of this policy, regardless of national legislation or local cultural sensibilities.

Management euthanasia/culling of animals which can reasonably be expected to cause a strong public or media reaction should be communicated by the Member responsible and/or the EEP coordinator to the EAZA Executive Office using [info@eaza.net](mailto:info@eaza.net) and indicating 'Management euthanasia/culling as the subject line.



## Appendix 26 Euthanasia for Population Management: Scientific Background

Version April 2026

[References to sections in the EAZA Population Management Manual are **highlighted**]

### Table of Contents

Executive summary

Introduction

Why manage populations

THE POTENTIAL ROLES OF EX SITU MANAGEMENT IN SPECIES CONSERVATION

THE ROLES OF ZOOS AND AQUARIUMS, AND THEIR POPULATIONS

The population management toolbox: scientific background

WHY GENETIC AND DEMOGRAPHIC MANAGEMENT?

THE CURRENT PHASE IN EAZA'S POPULATION MANAGEMENT HISTORY

THE 4 FACTORS THAT CAN BE ADJUSTED IN POPULATION MANAGEMENT

Births/hatches

Imports – of individuals from outside the managed programme

Exports – transferring individuals outside of the managed programme

Deaths - through Management Euthanasia

Concluding remarks

References

### Executive summary

Management euthanasia is an important and accepted tool in EAZA's population management toolbox, that contributes to maintaining demographically and genetically healthy populations with individuals with positive animal welfare, which is a key objective of EAZA.

When EAZA Members are faced with decisions on the application of management euthanasia, these decisions should be informed, and, when applied, management euthanasia should be practiced with confidence and competence. Therefore, it is relevant for EAZA to provide guidance to those Members that require it. This appendix provides the scientific, and more specifically the population biological background for why management euthanasia is an important population management tool.

While not all of EAZA's Ex situ Population Management Programmes (EEPs) need to be sustainable (because the specific roles set out for them do not require this), the fact remains that most populations nevertheless should be. Due to space and resource limitations, *ex situ* populations are often small, especially compared to healthy wild populations. They, just like small and fragmented wild populations, will need intense population management to reach and maintain genetic and demographic health.

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Change in population size, demographic structure and genetic diversity retained is determined by the number and individual characteristics of births/hatches, imports, exports and deaths. These are the four factors that one can adjust in *ex situ* management, and for this adjustment, we rely on a variety of different tools in the EAZA *ex situ* population management toolbox, each with a number of issues to be mindful of when using the tool. Being able to draw on a complete and varied population management toolbox, with confidence and competence, allows for flexibility and diversity within and between *ex situ* institutions, and for safeguarding the health of populations and positive animal welfare.

A thorough understanding of the EAZA population management structure as well as all tools in the toolbox, and the benefits and challenges that each presents for each taxon, case and situation, is important to make informed decisions about which tool to select for which case. For these reasons, this document provides the main background of EAZA's population management structure as well as an overview of the complete population management toolbox, of which management euthanasia is a part, in order to bring clarity on when it might be particularly relevant to consider applying it.

This Appendix is in alignment with and complements other EAZA standards, guidance and positions on management euthanasia, including [section 4.2.9](#) and [Appendix 27](#) 'Veterinary Consideration for Management Euthanasia' of the EAZA Population Management Manual, the [EAZA Position Statement on Management Euthanasia/Culling](#) [[Appendix 25](#)] and the [EAZA Standards for Welfare, Accommodation and Management](#) of Animals in Zoos and Aquariums. Recognising management euthanasia can be challenging to communicate to various audiences, the Communication Committee also has guidelines for EAZA Members that are available on the EAZA Member area.

## Introduction

Animal populations are the foundation for EAZA members to contribute to global biodiversity conservation or reconnect people with nature. Sound management is required for these populations to contribute to these overarching goals and for them to achieve the specific targets set out for them at regional and institutional levels. Management euthanasia is an important tool in EAZA's population management toolbox, that contributes to maintaining demographically and genetically healthy populations with individuals with positive animal welfare, which is a key objective of EAZA.

As such, the application of management euthanasia is a relevant consideration for all EAZA members, whilst recognising and accepting that the ability, comfort, frequency and taxonomic scope of application will vary between members. Decisions on the application of management euthanasia are and remain the responsibility of each individual member, and EAZA cannot and will not force its application on its members. This is in full alignment with the [EAZA Position Statement on Management Euthanasia/Culling](#) [[Appendix 25](#)].

When EAZA Members are faced with decisions on the application of management euthanasia, these decisions should be informed, and, when applied, management euthanasia should be practiced with confidence and competence. Therefore, it is relevant for EAZA to provide guidance to those Members that require it. This appendix will focus on providing the scientific, and more specifically the population biological background for why management euthanasia is an important population

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management tool. Through an overview of the complete population management toolbox, of which management euthanasia is a part, this document also aims to bring clarity on when it might be particularly relevant to consider applying it. No single tool will be the most appropriate one in all cases and all circumstances. Being able to draw on a complete and varied toolbox with confidence and competence, allows for flexibility and diversity within and between *ex situ* institutions, and for safeguarding the health of populations and positive animal welfare.

## Why manage populations

Starting from EAZA's vision "*Progressive Zoos and Aquariums Saving Species Together With You*", EAZA envisages for its animal populations that they "*contribute to global biodiversity conservation and inspire people to care for nature*". Sound management is required for these populations to contribute to these overarching goals and for them to achieve the specific targets set out for them in the Regional and Institutional Species Plans.

## The potential roles of *ex situ* management in species conservation

The unsustainable use of the planet's resources has resulted in the dual and interacting crises of biodiversity loss and climate change (IPBES, 2019; WWF, 2022). As a result, the earth is experiencing a human driven sixth mass species extinction event, the loss of entire branches of the tree of life, and a large spike in population losses and declines (Ceballos *et al.*, 2017; Ceballos and Ehrlich, 2023). All of this can be expected to result in the deterioration of biodiversity and ecosystem services (IPBES, 2019).

The Convention on Biological Diversity's [Kunming-Montreal Global Biodiversity Framework](#) (GBF) calls for taking urgent action to halt and reverse biodiversity loss and to put nature on a path to recovery. [Target 4](#) of the GBF 'Biodiversity Plan for life on earth', focuses on the need for species management actions, including *in situ* and *ex situ* conservation, to prevent extinctions and enable the recovery of species and their genetic diversity. [Resolution 79](#) of the 2020 World Conservation Congress of the International Union for Conservation of Nature (IUCN) promotes the integration of *in situ* and *ex situ* conservation interventions by applying the One Plan Approach (OPA). Under the OPA to species conservation planning, the *in situ* and *ex situ* conservation community come together to form one integrated conservation strategy for a particular (group of) species, that stipulates all the actions that are required to recover this taxon in the wild (*in situ*), including, when appropriate, intensive population management actions that take place *in situ* and/or *ex situ* (Byers *et al.*, 2013).

[Section 1.1]

[Section 2.2.1 and 2.2.2] In order to help integrated conservation teams understand the breadth of potential ways in which *ex situ* management can help species conservation, and to help them with evaluating whether a particular form of *ex situ* management is an appropriate conservation action for a given species, the IUCN Species Survival Commission (SSC) produced its [Guidelines on the Use of Ex Situ Management for Species Conservation](#) (IUCN SSC, 2014; McGowan *et al.*, 2016). These guidelines:

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- provide guidance on how to assess if, when, and for what purpose it may be appropriate to incorporate *ex situ* management in the conservation plan for a species,
- outline a 5-step decision process to do this assessment,
- help determine the precise role(s) and structure of an *ex situ* programme, in order for it to best contribute to the conservation of the species in question.

The Guidelines also explain that *ex situ* management can help species conservation **in 5 DIFFERENT WAYS**, and through 11 different roles [\[Appendix 2c\]](#) (Traylor-Holzer *et al.*, 2018 and 2019b)

1. **REDUCE OR STOP HUMAN INDUCED THREATS TO THE SPECIES** (through targeted conservation education *ex situ*)
2. **REDUCE OR STOP THE IMPACTS OF THREATS (HUMAN INDUCED AND STOCHASTIC) ON THE WILD POPULATIONS** (through demographic and/or genetic reinforcement of wild populations with individuals from *ex situ* sources)
3. **RE-ESTABLISH WILD POPULATIONS** (through reintroduction, assisted colonisation, or ecological replacement with individuals from *ex situ* sources)
4. **PREVENT EXTINCTION BY KEEPING POPULATIONS UNDER SAFER, *EX SITU*, CONDITIONS AND THUS BUY TIME AND KEEP FUTURE CONSERVATION OPTIONS OPEN** (through ark populations (for species extinct in the wild), short or long-term population rescue, or insurance populations (of live individuals and/or biobanked live cells))
5. **INCREASE THE EFFECTIVENESS OF CONSERVATION ACTION IMPLEMENTATION** (through targeted *ex situ* conservation research and *ex situ* conservation training)

An *ex situ* programme may be able to serve more than one *ex situ* role, either simultaneously or sequentially, depending upon how the programme is structured, managed or evolves.

## The roles of zoos and aquariums, and their populations

The important contribution that zoos and aquariums can make to the required ‘whole of society response’ to restore biodiversity, is fully recognised by the wider conservation community. The recent [IUCN SSC Position Statement on the Role of Botanic Gardens, Aquariums and Zoos in Species Conservation](#), urges all these institutions to achieve their potential in ensuring that species thrive in the wild, and urges the global species conservation community to work in a collaborative and integrated fashion towards reversing biodiversity declines. Within the European Union (EU), the [EU Zoos Directive](#) is an integrated component of the wider EU legislative framework for nature and biodiversity conservation, and ‘*seeks to promote the protection and conservation of wild animal species by strengthening the role of zoos in the conservation of biodiversity*’. The EU Zoos Directive is often regarded as the main instrument that allows the EU to fulfil its commitment toward [Article 9](#) of the Convention on Biological Diversity, regarding *ex situ* conservation. Conservation contributions by zoos and aquariums take place across the *in situ* – *ex situ* continuum, are planned and implemented by individual institutions as well as collectively, and can be species- or habitat-, area- and threat-focused (IUCN SSC, 2023; Barongi *et al.*, 2015; Minter *et al.*, 2018; EAZA, 2022).

Fulfilling these aims for species and populations requires joint decision making and a collaborative approach among the association member institutions, to allow for the strategic and effective sharing of space, other resources and expertise. To this end, EAZA’s Taxon Advisory Groups (TAGs) develop Regional Species Plans (RSPs) that give guidance to Members in terms of which species are

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recommended to be held by Members and why, and within these, which species should be cooperatively managed within EAZA *Ex situ* Programmes (EEPs) [Section 2.2]. EAZA members then use the guidance in these RSPs to develop their Institutional Species Plans across all species. [Section 4.1]

Selecting species that are most in need of *ex situ* conservation and ensuring that these *ex situ* activities effectively meet the specific conservation needs of those species, is an important part of Regional Species Planning. To this end, the IUCN SSC Conservation Planning Specialist Group (CPSG) and the zoo associations worked together to develop an RSP methodology that follows the spirit of the One Plan Approach and the 5-step decision process of the IUCN *ex situ* guidelines, to assess a large number of species in the context of regional species planning for zoos and aquariums (Traylor-Holzer *et al.* 2019a). Since 2018, EAZA has been using and refining this method to develop its RSPs as part of its new population management structure (de Man and Leus, 2018; Fienieg *et al.*, 2020; Sections 1.1, 1.2, 1.3, 2.2 and 3.9). For species for which an EEP is formalised, a Long Term Management Plan (LTMP) is developed that describes the genetic, demographic and any other population goals and management strategies in support of the EEP's roles as defined in the RSP. More details on the RSP and LTMP principles, processes and methods can be found in PMM sections 2.2 and 3.9.

## The population management toolbox: scientific background

### Why genetic and demographic management?

In large, wild populations in functioning ecosystems, there is gene flow between subpopulations through natural dispersal, individuals continuously try to optimise their reproductive success, and the population size is determined by the carrying capacity of the environment (through factors such as food availability, predation pressure/success and environmental variation leading to fluctuations in mortality or reproductive output). But in small, fragmented wild populations in anthropogenic landscapes with changing trophic interactions and ecosystem structures, these natural dynamics are compromised, and some form and level of population management may be necessary to maintain genetic and demographic health, for example through conservation translocations, intensive management actions *in situ* to improve reproductive success and/or reduce mortality in populations at risk (e.g. Fischer *et al.*, 2025), wildlife contraception, or controlled removal such as through hunting, trapping, collection, etc.

Similarly, *ex situ* populations are often small, especially compared to healthy wild populations (due to space and resource limitations). They may be distributed over different enclosures/institutions without dispersal opportunities, making gene flow impossible without human intervention. Hence, they will need intense population management.

As the section above indicates, populations in EAZA member institutions or programmes can have important roles to play, and sound genetic and demographic management is required for these



populations to meet the roles and goals that were set for them in Regional or Institutional Species Plans.

Under the previous 'Ark paradigm' for managing zoo populations, the default role for EEPs was to create an insurance population, with a default goal of genetic and demographic self-sustainability. It is important to understand that under EAZA's new 'one size does not fit all' *ex situ* programme structure, that is no longer a given [Section 1.1]. For example, programmes that do head-starting (*ex situ* rearing of wild collected eggs or juveniles for release), or EEP programmes with primary roles such as conservation research or training, development of husbandry procedures (e.g. for similar or related species), or indeed phasing out species), may not necessarily require long term, sustainable, breeding populations. Nevertheless, 67% of the 499 approved EEPs (as per December 2025) do still have an insurance role, and also for programmes with the roles of ark (3%), population rescue (4%), and source population (for conservation translocation to the wild) (14%), sustainability or another definition of healthy genetic and demographic potential are crucially important [Section 1.1.1]. (Please note that an EEP can have multiple simultaneous, or consecutive, roles). The fact that some populations need not be sustainable should not detract from the general requirement that most populations nevertheless should be.

Once the roles for EEPs have been defined in the RSP, the EEP coordinator with assistance from the EAZA Population Management Center (PMC), the EEP Species Committee and the TAG chairs, produce a Long Term Management Plan (LTMP), that among others defines the population goals for the EEP – predominantly how much gene diversity of the wild population should be retained in the EEP population and for how long, the target population size and growth rate, and whether any aspect of the demographic structure of the population (e.g. sex and age/life stage structure, reproductive potential etc.) needs addressing. Most EEP populations need to be demographically robust in order to limit the probability of extinction *ex situ*, and to reach and maintain a population size, structure and growth rate sufficient to maintain a large proportion of the genetic diversity of the wild source population, because:

- Very small populations have a high probability of going extinct due to demographic stochasticity (intrinsic demographic variation in mortality rates, reproductive rates, sex ratio at birth etc.), environmental variation and catastrophes (such as floods, fires, disease epidemics, theft, etc.) (Gilpin and Soulé, 1986). While an *ex situ* environment is generally a more controlled environment, these random factors cannot be 'switched off'. Demographic stochastic events that effect zoo and aquarium populations might include: a period with unexpectedly high neonate mortality; an epidemic that suddenly restricts animal transport or that leads to the culling of a certain part of the zoo population due to the legal stipulations of the respective country; major floods or fires at zoos or aquariums that keep the core population; or a war that suddenly leads to the inaccessibility of a certain part of the population. Very small populations, whether *in situ* or *ex situ* can easily be pushed on the brink of collapse by such events, whereas large populations can buffer such events and recover.
- Genetic diversity represents the evolutionary potential of a species, and genetically diverse populations have lower levels of inbreeding and tend to have a higher evolutionary fitness (Reed and Frankham 2003; Frankham *et al.*, 2010; DeWoody *et al.*, 2021). Many *ex situ* populations should therefore contain and maintain for the long-term a significant proportion



of the wild source population genetic diversity, in order to be able to supplement or restore wild genetic diversity should this be lost *in situ*, and to prevent inbreeding depression and reduced fitness (Lacy, 1994; Frankham *et al.*, 2010). However, just like small wild populations, small *ex situ* populations are vulnerable to loss of genetic diversity through genetic drift, inbreeding, and adaptation to the *ex situ* environment. Careful genetic management is required to limit these effects. Populations that should also be genetically sustainable often need to be substantially larger than the sizes required to avoid extinction from demographic stochasticity alone. This is especially true for self-sustainable populations (i.e. without further importations of unrelated individuals) and for species with shorter generation times (because genetic diversity is lost per generation, and species with short generation times pass through more generations in a particular time frame) (Frankham *et al.*, 2010).

No matter whether the population has conservation roles or non-conservation roles (e.g. sustainable populations for display, basic biological education, non-conservation research, etc.), most populations need to have stringent long-term demographic and genetic goals and management procedures to fulfil their aims.

## The current phase in EAZA's population management history

The creation of EEPs in 1985, in combination with significant advances in husbandry and welfare, the development of institutional and studbook data recording and sharing software, as well as the methods and tools of studbook analysis and population management (Leus *et al.*, 2011), for many EEP populations resulted in intrinsic population growth and increased longevity (e.g. Tidière *et al.*, 2016; Roller *et al.*, 2021). However, during the last ~15 years, in general, growth of EEP populations has markedly slowed and ultimately halted (Meireles *et al.*, 2026). The experience of the EAZA Population Management Centre (EAZA PMC) suggests that more and more EEPs - across taxa - have reached space capacity, combined in the last five years with the effects of the COVID pandemic (with e.g. reduced/delayed investment in new/enlarged enclosures/habitats/tanks) and increased restrictions in transport (e.g. due to diseases such as bluetongue, avian influenza; or due to political changes such as Brexit, etc.). This decrease in growth, combined with increased longevity, potentially into geriatric ages, has for many populations resulted in fewer young animals and individuals of prime breeding age, more breeding age adults that experience(d) a form of breeding restriction and may have less certain future reproductive potential (see later sections of this document), and more older individuals that are post-reproductive or have severely decreased breeding potential (Figure 1). The latter populations are potentially at risk, genetically and/or demographically, especially if management does not anticipate/react appropriately and when the reproductive age individuals have a potentially lower probability of breeding as a consequence of breeding restrictions (see the document sections below). The same principles also apply to taxa living in groups, for which individuals cannot be tracked or managed. Both within breeding groups and at the population level, a sufficient number of individuals of young or prime breeding ages/life stages, and the relevant sexes/reproductive modes, with good future reproductive potential, need to be present.

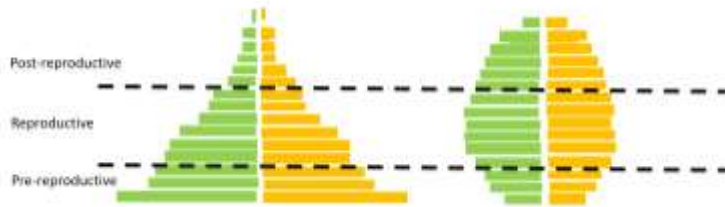


Figure 1: Population pyramids showing (left) the age pyramid of a population with a stable demographic structure, and (right) that of a population with more breeding restriction and more geriatric individuals, which is less stable and can put the population at risk.

The job of many coordinators has therefore become more intricate – needing to anticipate and recognise potentially critical situations, and on a day-to-day basis, needing to carefully balance between avoiding space problems and maintaining a genetically healthy and demographically robust population with good future breeding potential. As the below will show, management euthanasia is one of the important tools that can contribute to healthy genetic and demographic structures, especially for populations reaching their carrying capacity, and especially for taxa with very large clutch/litter sizes that would otherwise reach that carrying capacity (almost) immediately. Addressing these challenges will take a multifactorial and ‘whole of EAZA-population-management-society’ response (EEP coordinators, EAZA PMC, TAGs, Members, relevant EAZA committees and working groups, etc.). A good understanding of the complete EAZA population management toolbox, the important place of management euthanasia within this, and what to be mindful of for each of the tools, is therefore a relevant consideration for all EAZA members.

## The 4 factors that can be adjusted in population management

For both genetic and demographic reasons, there is a need for *ex situ* population management to exercise a level of control over which, and how many, individuals are added to/remain in the population. Change in population size, demographic structure and genetic diversity retained is determined by the number and individual characteristics of 1) births/hatches, 2) imports, 3) exports and 4) deaths. These are the four factors that one can adjust in *ex situ* management, and for this adjustment, we rely on a variety of different tools in the EAZA *ex situ* population management toolbox, each with a number of issues to be mindful of when using the tool, and information that should be gathered to allow evaluation and adaptive management.

### Births/hatches

#### *Number of births/hatches per year to reach target population size*

Genetically and demographically healthy *ex situ* populations should be large enough to a) be safe from extinction due to random demographic events (environmental and intrinsic variation in mortality rates, reproductive rates, sex ratio at birth etc., as well as catastrophes such as floods, fires, disease epidemics, theft, etc.), b) maintain the targeted percentage of genetic diversity of the wild source



populations, and c) appropriately address other concerns of the species, the EEP and the community, such as the species' natural history and welfare requirements and the availability of species-appropriate enclosure space. The population biologists of EAZA's PMC assist EEPs with defining the appropriate target population size, growth rate and retention of genetic diversity to match an EEP's roles, and, for species for which individual based studbook data are available, they use modelling in the studbook analysis software PMx (Ballou *et al.*, 2011; Traylor-Holzer, 2011) to guide this process. For group living, or stage-based rather than age-based taxa, equivalent analysis tools are under development (e.g. [PMxceptional](#), an extended version of PMx for analysis of populations with stage-based demography), but even without this, the same logic as described in this section applies, and rates might be estimated based on data and information from other recording systems and expert experiences.

Once the target population size and growth rate have been defined, the next question becomes, how many births/hatches are required in a given year, to reach this growth rate. Imagine that an *ex situ* population needs to be kept at its current size and that there are no imports or exports planned. In this case, the number of offspring born/hatched next year theoretically needs to equal the anticipated number of deaths. The latter can be estimated based on mortality patterns in the population during an appropriate period in the past. For example, by looking at how old males and females in the studbook population were when they died, the software PMx can calculate the probability that a male or female of a given age will die. When this is applied to the current age pyramid, this results in an anticipated number of deaths next year. PMx can also model this for more than one year into the future. In order to grow the population, one needs to produce more births than deaths, and the reverse to decrease a population.

In order to reach the desired number of offspring born in a given year, individuals/groups need to be assigned breeding recommendations by the EEP coordinator. How many individuals/groups should receive a breeding recommendation depends on the litter/clutch size, but also on the probability of breeding for each of the individuals/groups.

#### **BE MINDFUL OF:**

- The probability of breeding can be difficult to estimate because it is influenced by many factors, for example: age, parity, health, probability of breeding of the partner, mate compatibility, social status, group dynamics, the environment (e.g. physical cues, enclosure characteristics, etc), whether an institutional transfer is required, institutional cooperation, time spent not breeding, contraceptive method and history, etc. Indeed, some of the tools in the population management toolbox, that will be discussed further down in the text, for example those used to prevent breeding, can also influence that probability. Compliance with breeding recommendations on the part of the institutions receiving the recommendation adds another factor that should be considered.
- The more uncertainty a coordinator has about which factors significantly influence the probability of breeding, and how, and by how much, the more difficult it is to estimate how many individuals/groups to give a breeding recommendation, and the more likely it is that too many, or too few offspring, will be produced.
- It is important for EEP coordinators and their species committees to define potentially important factors that influence the probability of breeding, as well as data points that could



realistically be recorded, shared and analysed, to increase confidence around if, how, and how much probability of breeding is affected.

- This section has focussed on reaching a set population growth rate. However, coordinators also have to be mindful of the effects of their reproductive planning on the future age pyramid structure (for example, sustained restricted breeding will result in populations with increasing mean/median age and fewer young individuals), and understand/anticipate how current age structure affects future reproductive planning (for example large cohorts of individuals at certain ages that will all reach old age simultaneously will, unless this was anticipated/mitigated, result in a new large cohort of young individuals to compensate this). PMx modelling needs to be well understood and interpreted.
- For taxa with very large litter/clutch sizes, just a few, or even just one, breeding event from a 'pair' or group could mean reaching the target population size and carrying capacity relatively quickly, or even immediately, if all the eggs are hatched and offspring reared (e.g. with certain amphibians, fish or invertebrates). In these cases, the number of individuals/groups that should breed in a given year can be driven more by genetic than demographic considerations (making sure that enough and the right individuals/groups get the opportunity to pass their genetic diversity on to the next generations), and management euthanasia is already a more widely used tool for such taxa (see also section on Management Euthanasia below).

### *Who breeds and with whom*

Once it is clear how many individuals/groups should breed, the next question becomes, who should do the breeding, and with who. One of the important drivers of this decision is the need to maximise retention of genetic diversity.

For a large proportion of seed-bearing plant species, the genetic diversity of the seeds collected from the wild can be preserved long-term through appropriate storage in [seed banks](#). However, for *ex situ* animal populations of non-domestic species, the main way to preserve the genetic diversity of the founding generation for the long-term is for the founders and their descendants to breed and pass on their genetic material to the next generations. Increasingly, the use of cryopreserved gametes, living cell lines, embryos and tissue samples is integrated in, and brings added benefit and opportunity to, *ex situ* preservation of animal genetic diversity (Bolton *et al.*, 2022; Mooney *et al.*, 2023). Nevertheless, a breeding population is, and will remain, a critical component for the majority of *ex situ* populations of wild animal species, for example because species-specific cryopreservation techniques are still under development (and currently only for a very limited number of species), there is still insufficient sample availability, or because living females are essential for conception from cryopreserved gametes or to carry cryopreserved embryos to term.

Zoos and aquariums tend to use the method of minimising mean kinship to genetically manage the breeding in a population of a species that can be managed at the individual level (Ballou and Lacy, 1995; Ballou *et al.*, 2010; Frankham *et al.*, 2010). The mean kinship value of an individual is calculated as the average of the coefficients of kinship of that individual with every individual in the population. Individuals with lower mean kinship values therefore tend to have fewer relatives (smaller family sizes) and are given higher priority for breeding, because should these individuals die after producing no or very few offspring, there are few other individuals in the population that can pass on the family's genetic diversity in their place. Individuals are also preferentially paired with partners with similar



mean kinship values, to avoid creating offspring with both under- and overrepresented genetic material. Finally, inbreeding is minimised by limiting breeding among closely related individuals. The mean kinship value of individuals in the population, and inbreeding coefficients of potential offspring, can be calculated by the studbook analysis software PMx (Ballou *et al.*, 2011; Traylor-Holzer, 2011).

Methods and software commonly used for recording and analysing pedigrees to help manage populations at an individual level are, in their current form, not yet adequate for managing all forms of group-living species. Work is still in progress to further develop PMx to cater for group-living species (e.g. Jimenez-Mena *et al.*, 2015), and to further develop additional methodologies and record keeping, modelling and analysis tools for genetic management of groups (Rodriguez-Clark and Traylor-Holzer, 2020). However, the same basic principles apply – maintaining genetic diversity within and between groups is important, the genetic importance of groups can change depending on what happens with related groups, and maintaining sufficient future reproductive potential of groups must be paid attention to.

The genetic importance and compatibility of potential partners is not the only factor driving breeding and transfer recommendations, and needs to be integrated with factors such as natural history, behaviour and socio-dynamics, welfare, enclosure characteristics, space availability, transfer and other logistics, etc.

#### BE MINDFUL OF:

- The mean kinship values of individuals/groups can easily change. They may change when individuals/groups are added to (by reproduction or importation) or leave (through death or exportation) the population, as these events may influence the number, and closeness, of related individuals/groups. The mean kinship value of an individual/group may thus also change regardless of whether it itself produces offspring – it will change whenever relatives breed, die, enter or leave the population. The genetic value of individuals/groups will therefore fluctuate over time.
- Maintaining the future reproductive potential of as many individuals/groups as possible is therefore not only important for demographic robustness, but also for the ability to retain higher levels of genetic diversity.
- Some of the other tools in the population management toolbox, for example those used to prevent breeding, can affect the future reproductive potential of individuals/groups (see below).
- It is important for EEP coordinators and their species committees to define potentially important factors that can affect the future reproductive potential of individuals/groups, as well as data points that could realistically be recorded, shared and analysed, to adopt management processes that reduce the risks of losing future reproductive potential.

### *Prevention of breeding*

In order not to exceed demographic targets, overshoot space capacity, or prevent production of genetically overrepresented offspring, selective prevention of reproduction can be applied.

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In general, reproduction can be prevented in males and females through (Asa and Porton, 2010; Wallace *et al.*, 2016):

- a) reversible contraceptive methods (hormonal, immunological, mechanical (e.g. intra-uterine devices) and surgical (e.g. vasectomies – though reversibility is very uncertain and should not be counted on))
- b) permanent contraceptive methods (e.g. castration, ovario- and/or hysterectomy, and, in practice, also often vasectomies)
- c) separation of sexes, and
- d) removal of environmental triggers and/or other conditions for breeding

### *Reversible or permanent contraceptive methods*

Contraception can be a valuable and effective tool for *ex situ* population management, that allows:

- the finetuning of pairing combinations for genetic management, and
- the control of population size and population growth

There are many different contraceptive methods, products and procedures and numerous factors need to be considered when deciding if and which contraceptive approach is most appropriate for a given situation, such as:

- species biology; age, health, genetic importance and reproductive status and circumstances of the individual/group;
- the efficacy, safety, reversibility, method/frequency of delivery, availability, and cost of the method;
- behavioural effects and ramifications for social group dynamics;
- culture, value system and ethics of the EAZA Member.

Most contraceptive research and development has taken place for humans, livestock or pets; or in the context of wild or feral population management (Asa and Porton, 2010). For the majority of wild species, there is very little experience with, or information on, the use of contraceptive methods and no standardised trials tend to be available. Their highly variable reproductive physiologies also make it harder to extrapolate from experiences with pets or livestock, or sometimes even related wild taxa. This makes it challenging to make well-informed choices. To address this, the [Reproductive Management Center of the Association of Zoos and Aquaria](#) (AZA RMC) (in North America) and the [EAZA Reproductive Management Group](#) provide, collect and centralise data from zoos and aquariums about the use, efficacy and effects of different contraceptive methods on their species. In this way, data can steadily be collected and science-based information and guidelines produced on the basis of the available experience to date.

For example, when studying the effects of melengestrol acetate contraceptive implants, no significant difference was found in the probability of reproduction between non-implanted and implant-removed groups of colobus monkeys (*Colobus guereza*) (McDonald *et al.*, 2021). In hamadryas baboons (*Papio hamadryas*), it was found that the probability of reproduction for non-implanted females reached 86% after 40 months and plateaued at 96% after 84 months, compared to it plateauing at 63% after 40 months for females whose contraceptive implant was removed (McDonald *et al.*, 2024). For both species the probability of reproduction was significantly lower (than for the other two groups) for animals whose implants were left in place past expiration date. For the

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colobus monkey, stillbirth rates were significantly higher post-contraception compared to pre-contraception.

As the [guidance materials of the EAZA RMG](#) demonstrate, while reversible contraceptive methods are designed to be fully reversible, in practise, taxonomic and individual variation occurs in the degree of, and time to, reversibility; and this can be heavily influenced by the details of contraceptive administration. Assessing the success and appropriateness of contraceptive methods must also look at more than reversibility alone. For many species, there is, both between and within products and methods, also still an important degree of data deficiency, uncertainty and individual variability in the effects of contraception on a whole series of other factors such as (where relevant): occurrence and prominence of cycling, oestrus or menstruation, presence and degree of sexual swelling, changes in weight, effects on longevity and effects on behaviour (e.g. libido, courtship and mating behaviour, changes in group hierarchy, females expressing masculinised, or males expressing feminised, behaviour and sexual characteristics, and potential reactions with other drugs affecting efficacy). Further data collection and research are certainly necessary to gain a more complete understanding. In addition, while there is data deficiency within mammals, there is comparatively much more information available for mammals than for other taxa.

In taxa with complex (allo)parental and social behaviours, the (near) absence of breeding in social groups leads to less rearing experience for females or alloparents, and less social interactions of other group members with mothers caring for infants or with juveniles or subadults. For example, in a number of primate species, infant rearing experience has been shown to be linked to improved infant survival (e.g. Robinson *et al.*, 2024). This not only applies to current (allo)parents, but also to other group members that are future (allo)parents. Limiting the opportunity to breed for such species not only deprives females and group members of the opportunity to express important and intricate components of their natural behaviour patterns, it may also reduce the survival of offspring that are produced and compromise the future growth potential of the population by curtailing the reproductive competence of current individuals (Munson *et al.*, 2005; Wallace *et al.*, 2016). In populations with prolonged reduced breeding, there may also be reduced confidence and competence among staff for those husbandry skills required to result in successful reproduction and rearing of the species. Once population managers have determined that the number of offspring in the population needs to increase again, females or group members, and zoo and aquarium staff, may regain rearing experience during a 'learn through trial and error' period with higher infant/juvenile mortality, but for *ex situ* populations in demographic peril, this delay in successfully producing more young animals may bring the population closer to collapse.

The absence of births in itself might affect group dynamics or stability. In taxa/cases where contraception, and/or the absence of breeding leads to increased social instability, including group breakdown or expulsion of individuals, more enclosures may be needed to house the same number of individuals, thus impacting population carrying capacity. For example, in golden-headed lion tamarins (*Leontopithecus chrysomelas*) the absence of births, rather than changes in socio-sexual interactions between group members associated with the contraceptive treatment, seemed to be responsible for higher group instability in contracepted groups with all offspring older than 1 year, than in contracepted groups with younger offspring (De Vleeschouwer *et al.*, 2003). Perhaps the lack of natural dispersal opportunities in zoo groups and differences in male and female reproductive

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strategies can cause changes in group dynamics in non-breeding groups, the precise nature of which may depend on the reproductive strategies of the species in question.

Permanently neutering an individual ends its reproductive potential for the remainder of its lifetime – unless gametes, tissues or cell lines were successfully cryopreserved and the assisted reproductive techniques to make use of these have been developed for the species. Meaning that, should this individual's genetic importance increase (see 'Genetic management for breeding' above), it is no longer able to naturally pass on its genetic diversity to the next generation. It can also no longer naturally contribute to boosting the population demographically, for example if an unexpected population decrease occurs. A neutered individual is in that sense 'genetically and reproductively nonfunctional'. While these individuals can have other important population functions, for example in social species, they also occupy space in the total carrying capacity for the species. Naturally, these population biological challenges and risks increase with increasing numbers of neutered individuals.

### *Separation of sexes*

Reproduction can also be reduced or prevented, for individuals or groups, through the separation of sexes. In addition, the keeping of a group of males can, for species with fewer males than females in social breeding groups, also act as a genetic reservoir for future use (Wallace *et al.*, 2016), and may well represent an important life-stage of gaining social competence for subadult males. Whether single sex groups are appropriate for a particular species requires a thorough understanding of the species' and individual group's social organisation and behaviour. For example, in aquarium fish, individuals in long-term single sex groups may show an increase in stress behaviours and aggression (B. Zimmerman, personal communication, 29 December 2025). There may be limited information or experience (*in situ* or *ex situ*), and a period of learning and adaptive management may be necessary if the decision to form such groups is made. The keeping of such groups can also demand an investment in number, size and structure of enclosures, for example when such groups can only include a few individuals (e.g. callitrichid primates), or require larger, more complex, stronger, etc. enclosures (e.g. male elephants). This investment should not only be understood as relevant for this species, but also for other species that are affected by decisions about resource allocation.

Whereas it is often assumed that single sex groups hold no risk to the future reproductive potential of the individuals (because no contraceptive products or devices are involved), it is prudent for this to also be evaluated. In a number of animal taxa, reproductive changes that negatively affect fertility have occurred in females that are housed in non-breeding situations for extended periods of time, also in cases where breeding was prevented by separating females from males, or where females were kept with sterile males (Penfold *et al.*, 2014). In some taxa, repeated non-conceptive cycles may carry as much risk as the use of some contraceptive products (Asa *et al.*, 2014; Penfold *et al.*, 2014), and in others, females may become infertile if they have not bred before a certain age (Penfold *et al.*, 2014; Saunders *et al.*, 2015). Such species are often dubbed 'use it or lose it' species and the advice for these groups of species can roughly be summarised as 'breed females early (not too long after sexual maturity) and often (at regular, species-appropriate intervals)'.

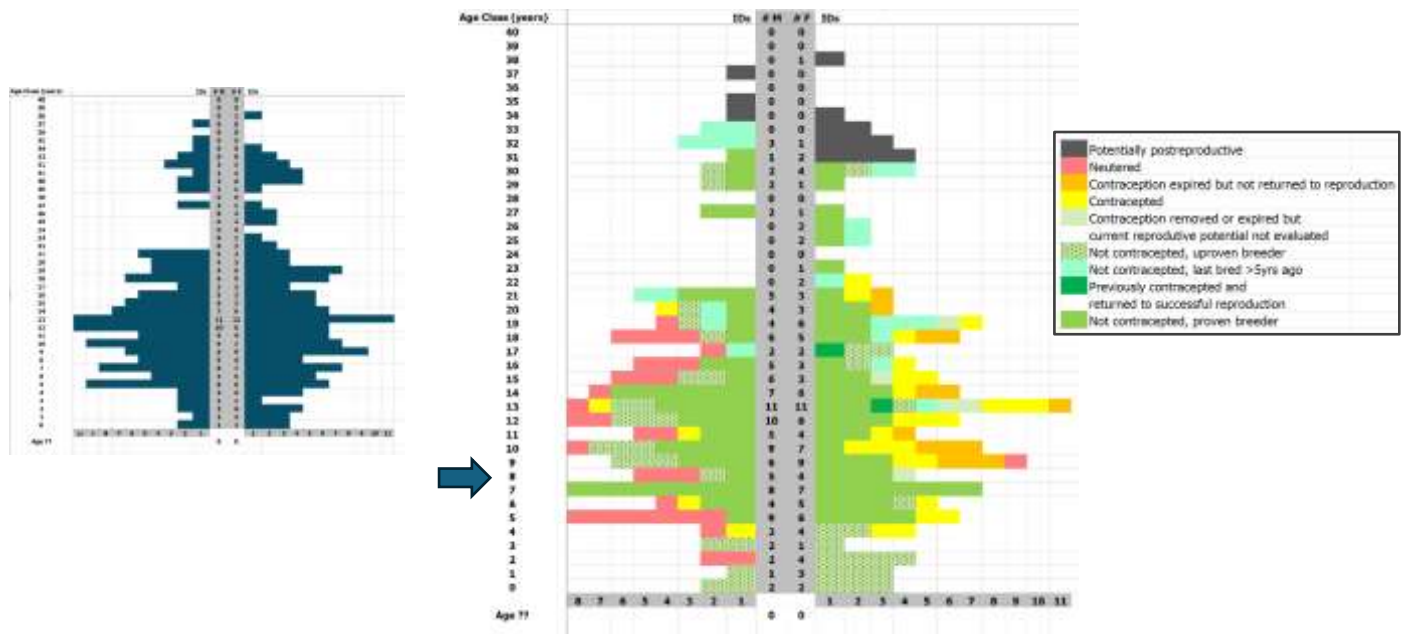
Naturally, separation of sexes becomes more problematic for species living in large groups and without sexual dimorphism. And it can become futile for taxa that can also reproduce without a sexual partner, such as through self-fertilisation, parthenogenesis, budding, fragmentation, etc.

**BOX 1: Evaluating degree of certainty for future reproductive potential of EEP population**

Age pyramids are an obvious first step for evaluating the future reproductive potential of the population. Even at a glance, one can get a reasonable first impression of whether there are a sufficient number of young individuals and adults of prime breeding ages, of both sexes. In addition to investigating the pyramid shape, managers are also encouraged to assess the degree and certainty of the future reproductive potential of the individuals that make up the age pyramid. This will indicate whether the population’s future reproductive potential is as the shape of its age structure suggests, or if it is potentially worse.

The general shape of the age pyramid of this theoretical species shows that there have been a number of years with fewer young produced and/or surviving, and that there are a fair number of ageing individuals at the top of the pyramid. Still, the species is fairly long-lived and there still appear to be a good number of breeding-age individuals of both sexes. However, if one digs deeper, and looks into the reproductive and contraceptive history of the individuals involved, a different picture emerges. The number of individuals that are not neutered, have never been contracepted, are proven breeders and have bred within the last 5 years is relatively small compared to the total population. Many individuals have at least one aspect in their history that can increase the uncertainty around their future reproductive potential. The potential risk factors for each of these aspects were explained in the section ‘prevention of breeding’ above. How much each of these aspects matters will depend on the taxon and its natural history, the product used, the procedures used, etc., and often there is little hard data to base the evaluation on. This example demonstrates that: a) it is important to look ‘under the skin’ of age pyramids; b) which factors one should keep an eye on will depend on the taxon – what is important to monitor for one species may be less important for another; c) it is critical that the relevant information on treatment and effects is recorded by the institutions, and shared (via the EAZA RMG and ZIMS), so that EEP coordinators can do these types of assessments and experts can continuously improve guidance; d) consult experts on what is essential to monitor and record.

For group living taxa for which individuals cannot be tracked or managed, individual and age-based age pyramids may not apply. However, the same principles do apply. One may have to look into the reproductive history and state of groups, generations, life stages and sexes/sexual systems, rather than individuals.



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### *Removal of environmental triggers or conditions for breeding*

In some taxa, reproduction may be triggered by species specific (combinations of) environmental factors, such as particular thresholds or cycles for photoperiod, climatological factors (e.g. temperature, precipitation, humidity), aestivation or hibernation and nutritional changes (e.g. amphibians: Silla *et al.*, 2021). Indeed, for some taxa, replicating these specific environmental stimuli *ex situ*, to initiate breeding behaviour, achieve high rates of fertilisation and large numbers of viable offspring may be the biggest challenge. However, for those taxa in which that can be done successfully, withholding those triggers may be able to prevent reproduction. There is little information on the short and long-term effects on future reproductive potential, general health and welfare, social behaviour, etc.

### **BE MINDFUL OF:**

- No method to prevent reproduction is appropriate for every species, every individual/group, or every circumstance.
- For many wild species, there have been no standardised trials, or systematic data recording and evaluation at population level. Hence there may be relatively limited (smaller sample sizes/more anecdotal/incomplete metadata) experience to base decisions on.
- Numerous factors influence the best choice for each case – investigate what information is available for your case (contact the EAZA RMG where needed/desired) and take the care and time to make your decision on the best available information.
- After reproduction has been restricted/delayed in a population, the probability that an individual with a breeding recommendation will truly breed, and that the offspring will survive, may be lower and/or more uncertain (unless effects have been carefully monitored, and were able to be understood and mitigated) (Penfold *et al.*, 2014). EEP coordinators may thus need to increase the number of females with breeding recommendations, to ensure that a desired number of offspring are truly born. This in turn may result in more variation in the actual number of offspring born, culminating in increased probability to overshoot or undershoot the population size target. Genetic management may also become less effective, because breeding recommendations also need to be given to animals with higher mean kinship values to have enough females in breeding situations (Penfold *et al.*, 2014).
- Prolonged restriction of reproduction will (regardless of the method used) also result in a narrower base of the population's age pyramid. As this smaller number of young individuals move into reproductive age classes, there are fewer individuals available for breeding (Ballou *et al.*, 2010). If, by design, or in reaction to an unanticipated catastrophe, at some point in future the population needs to grow again, this can become a challenge if the reproductive potential and/or the rearing success of the breeding age animals has become compromised or uncertain. In cases where the age pyramid becomes inverted (many older animals, few younger animals), as the larger group of older animals nears the limits of longevity, the population manager needs to anticipate their death and potentially increase birth rates again, to reach or maintain the population size target. Therefore, care needs to be taken to ensure the presence of a sufficient number of younger animals with a sufficient potential for producing and rearing offspring.



- Ensure instructions for administration of the contraception are followed as closely as possible to maximise the chances of restoration of reproductive ability following cessation (e.g. if recommended, remove contraception at the end of the stipulated active period, rather than leave it in place to let it expire).
- Record the requested information on each contraceptive event:
  - Members: submit your data to the EAZA RMG contraception database, (so the RMG can steadily collect and centralise available information and update guidelines on the basis of the available experience to date (<https://eazarmg.org/>); and
  - Members: record every case of contraception in ZIMS and keep this information up to date (not only when it is applied, but also when it is stopped/removed or whether it is still in place and left to expire). Coordinators are often operating without complete knowledge of the contraception status of the individuals in their population.
- Reproductive activity in itself (courtship, mating, (allo)rearing, etc.) represents a behavioural complex that affects the quality of life of every animal. The degree to which a prevention of reproductive behaviour will affect the life of an animal is taxon and sex-specific. A decision to prevent reproduction should not be based on demographic and genetic considerations alone, but also on welfare considerations, taking into account a species' reproductive behaviour and physiology (Schiffmann *et al.*, 2025).

## Imports – of individuals from outside the managed programme

In cases where there is a need to supplement the EAZA population with individuals/groups for genetic and/or demographic purposes, importation of individuals/groups from outside the managed population can be considered. For this to be possible in practice, the right individuals/groups need to be available at the right time, and many factors need to be considered and agreements or regulations adhered to, including but not limited to: the transfer being legal (following local, national and international regulations and conventions), sustainable (not harming the *ex situ* or wild population they leave, or the *ex situ* population they enter), ethical, not indirectly contributing to illegal trade, giving due consideration to the welfare of the animals that are transferred, and giving due consideration to any *ex situ* management programmes in the area, country or region of origin. When considering such transfers, EAZA member institutions must adhere to EAZA's rules for "Joint Population Management" [section 3.7] and "Animal Acquisition and Disposition" (including its section on importation of wild caught animals) [Section 4.2].

### BE MINDFUL OF:

- While quite a number of EEPs have made appropriate use of this population management option, to the benefit of the EAZA/EEP population, experience has also taught that especially in the case of threatened species and imports from outside the EU or the European continent, the logistics for these transfers can be difficult, lengthy and expensive. In most cases this means that importations can bring a sporadic (and potentially critical) benefit, but are not a systemic solution.

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- Be realistic in planning (e.g. RSP and LTMP) and expectations. Carefully assess how practically feasible importations are for the taxon and situation in question, and to what degree they can, or cannot, be relied upon.

## Exports – transferring individuals outside of the managed programme

In addition to managing or preventing reproduction and considering importations, the population growth rate and size, and the genetic makeup of the offspring that will contribute to the next generation, can also be controlled by removing living individuals/groups from the managed population, either by transferring them to a location outside of the managed population, or by humanely killing them (performing management euthanasia) (see section below).

As is the case for importations, when transferring individuals/groups outside of the managed programme, there are many similar aspects to be considered, and agreements or regulations to be adhered to, including but not limited to: the transfer being legal (following local, national and international regulations and conventions), sustainable (not harming the *ex situ* population they leave, or the *ex situ* or wild population they enter), ethical, not indirectly contributing to illegal trade, giving due consideration to the welfare of the animals that are transferred (during transfer and at their destination), and giving due consideration to any *ex situ* management programmes in the area, country or region of both origin and destination. Individuals/groups may also be removed from the *ex situ* population through releases to wild locations or populations. However, releases to the wild must always be driven by a conservation need of the wild population and never by the need to resolve issues in *ex situ* populations. In addition, any release to the wild must also be organised in accordance with professional standards. For these reasons, any exports of animals from EAZA member institutions must adhere to EAZA's rules for "Joint Population Management", "Acquisition and Disposition" and "Releasing Animals to the Wild" [sections 3.7, 4.2 and 4.3].

### BE MINDFUL OF:

- Transfers of specific individuals/groups to specific *ex situ* destinations outside of the EEP population, that are in compliance with the EAZA's rules and procedures, certainly form a valid and valuable tool for population management. At the same time, finding suitable and acceptable destinations with available space at the time of need can be very challenging, and this does not represent a durable solution all by itself. Rather, it is another important tool in a varied population management toolbox.

## Deaths - through Management Euthanasia

For the purpose of this document management euthanasia is defined as in the [EAZA Position Statement on Management Euthanasia/Culling](#) [Appendix 25]: the removal of animals from a population in human care, for non-medical reasons, by humane killing carried out by appropriately

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qualified and experienced staff (ensuring absolute minimisation of suffering of the animal during the process of ending its life within the limits of the technology available and the opinion of recognised welfare science). This position statement also clarifies EAZA's position on this population management tool, and emphasises the importance of following national legal requirements if and when it is applied.

Management euthanasia is an important and accepted tool in EAZA's population management toolbox. It is also not a novel approach, but has been part of the zoo community's discussion of population management for a long time (Seal and Foose, 1983; Lacy, 1991; Richardson, 2000; Walraven *et al.*, 2018; and Clauss *et al.*, 2025).

Being able to remove certain individuals/groups from the population means that fewer individuals/groups in the population need to be temporarily or permanently contracepted or otherwise restricted from breeding, for genetic or demographic management. As the previous sections in the document have aimed to clarify, more individuals/groups breeding in the population reduces the potential population-level risks associated with controlled/restricted reproduction, and leads to a population with:

- a higher, more predictable and reliable future reproductive potential;
- a more robust demographic structure (e.g. healthier age/life-stage and sex structure);
- a reduced risk of loss of genetic diversity due to potential unintended infertility, reduced/delayed fertility, or less successful rearing of offspring;
- more effective genetic and demographic management; and
- more expression of courtship, breeding, rearing and any other complex social interactions that may be typical for the species, which is of increased population biological consequence for social species and species with parental care.

### **Decisions made before, versus after young have been produced**

In populations with restricted breeding, when relatively few animals are born per year, there is a higher probability for a skewed sex ratio among these offspring, purely due to demographic stochasticity. For example, in species with a polygynous mating system, a few years of mostly male offspring born can increase space problems and quickly reduce reproductive potential, because the number of females with breeding potential is the limiting factor for growth.

For many species, the sex ratio at birth is 50:50, and there is no easy way to deliberately skew this in a particular direction to address a demographic imbalance. Hence about as many males and females will be born. This means that for species living in harem-systems (many primates, carnivores, ungulates, elephants), some space must be reserved for the potentially supernumerary sex. In some cases, single sex groups can be formed that function as a genetic reservoir for future use and may present opportunities for the acquisition of social competence by subadults. Still, likely fewer individuals of the supernumerary sex are needed for breeding than are produced. Management euthanasia can help to address space issues in such cases.

In populations where management euthanasia is not used at all, decisions about how many individuals/groups to breed, and with who, are always taken 'a priori' and are often based on

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deterministic calculations using average probabilities of breeding and dying, average numbers of litters/clutches per year, average litter/clutch sizes etc. Especially in already small populations, with relatively few breeding recommendations and offspring produced because of restricted breeding, stochastic factors can cause the actual number and sex ratio of offspring produced to be quite different (larger/smaller/more skewed) from the expected. When managed euthanasia can be applied, more individuals/groups can be allowed to breed and managers can select which living individuals/groups to remove after they have been produced, and thus manipulate the sex, age/life stage structure, social group structure and genetic diversity according to the specific needs of the group and population at that time. This allows for more effective genetic and demographic management.

### **When populations suddenly need to increase again**

When management euthanasia can be applied, more individuals/groups in the population are producing offspring, which is beneficial in the event the population needs to increase in size again, given more individuals/groups are already in a breeding 'modus' and situation, and that the demographically and genetically required offspring may already be part of the population and can remain in the population, rather than be euthanised or transferred.

Increasing the size of a population in which breeding has been more restricted and controlled often runs into delays, which can be especially detrimental to populations that are already in peril. Processes that can contribute to delaying a population-rebound include: the time between conception/fertilisation and birth/hatch (especially for taxa in which that is long), biologically short time windows for mating, delays associated with institutions needing to act on breeding recommendations (removing contraception or waiting for it to expire, bringing partners together, etc.), uncertain and variable time required for individuals to return to fertility after contraception, time required to regain offspring rearing skills, time required for zoo and aquarium staff to regain skills related to managing reproduction in challenging species (e.g. breeding partner introductions, preparing for spawning/egg laying/nesting/incubation/ parturition, neonatal care, etc.) (Scherer *et al.*, 2024). The longer the time period between the recommendation of the EEP coordinator and its desired result (the intended offspring), the more time there is for stochastic factors to further compromise the successful outcome of recommendations (for example, new transport restrictions due to epidemics, unexpected mortality of individuals involved, etc.).

### **Space**

As explained in other sections above, in populations where reproduction has been more restricted and controlled, it can become increasingly difficult to determine how many breeding recommendations should be issued to reach the required number of births/hatches, and there can be a large variation in the actual number of offspring produced (i.e. a larger chance to undershoot or overshoot the targeted number). In terms of space, a coordinator may thus need to cater for the possibility of more individuals being born than targeted, and they may for that reason not be confident to make full use of the available holding space.

In some cases, more enclosures/habitats/tanks may be required for populations managed without the application of management euthanasia, than with. For example, this may happen when

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contraception or the lack of offspring increases social group instability, when the use of other tools reduces the confidence of estimating the likelihood that individuals/groups with breeding recommendations will breed (and one has to prepare for the possibility of overshooting targets), when more enclosures/habitats/tanks are required for single sex groups etc. Thus, one must be aware that population management decisions can affect not only the managed population itself, but also other populations of other species, for example through space competition with species with similar (quantitative and qualitative) space requirements. Space and resources dedicated to some of the individuals that are not/no longer contributing to the genetic and demographic goals of the population might be highly valuable to house important individuals of other species.

Evaluating how the community's resources are distributed across various populations requires collaboration beyond the individual species level. Given that space in zoos and aquariums is by definition always limited, options for exportation might also be limited (see section on 'Exports' above), that institutions are moving to bigger and more complex habitats to promote positive welfare, and that the biodiversity crisis means that more species would potentially benefit from *ex situ* management, the space factor is an important component of assessing feasibility in the decision making process for Regional and Institutional Species Plans, and affects which and how many species will be the subject of EEPs [[Section 2.2.2](#)].

### **Large litter sizes**

In species that produce large numbers of clutches/offspring per clutch, such as many amphibians, fish, and invertebrates, but also certain reptiles, birds and mammals, wild populations typically experience higher mortality. Therefore, a very large proportion of the offspring/hatchlings would never make it to adulthood due to for example predation. If *ex situ* husbandry practices are well developed, the majority of offspring/hatchlings could potentially be reared, and that would cause immediate and acute space problems (see also section above, on number of births/hatches per year). For a number of taxa, just a few, or even a single, breeding event could lead to an overshoot of carrying capacity, if all eggs are hatched/ all offspring are reared. Hence, management euthanasia is common practice in the husbandry of such species, and without it, breeding may even become impossible.

### **Welfare**

As was touched on in the section on 'prevention of breeding' above, in populations where management tools such as contraception or separation of the sexes are utilised, fewer individuals/groups can experience the expression of courtship, mating, breeding, (allo)rearing and other complex social interactions that may be typical for the species. These practices can be of genetic and demographic relevance (e.g. for species with (allo)parental care when this improves mating success and offspring survival), and the expanded behavioural repertoire brings added positive animal welfare to the individuals/groups involved (Schiffmann *et al.*, 2025). The aspect of welfare grounds for management euthanasia is not further expanded on in this document, because its focus is on genetic and demographic population management. It is, however, of significant importance, and a number of aspects are touched upon in EAZA's [Standards for Welfare, Accommodation and Management](#) of Animals in Zoos and Aquariums (in particular section 6.4 on Management Euthanasia) and the [EAZA Position Statement on Management Euthanasia/Culling](#). Under the welfare view, death is not a welfare issue (Jensen, 2017; Yeates, 2010) as it is commonly accepted that euthanised animals do not experience reduced welfare compared to living animals, if

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they were well looked after during their lifetime and if they were humanely killed (Penfold 2014). [EAZA's Position Statement on Management Euthanasia](#) defines humane killing as being carried out by appropriately qualified and experienced staff, ensuring absolute minimisation of suffering of the animal during the process of ending its life, within the limits of the technology available and the opinion of recognised welfare science.

#### BE MINDFUL OF:

- Management euthanasia is an important tool in EAZA's population management toolbox, that contributes to maintaining demographically and genetically healthy populations with individuals with positive animal welfare, which is a key objective of EAZA.
- Management euthanasia may be particularly important to help increase the likelihood of preserving sufficient future reproductive potential and behavioural competence at individual and population level. Reproductive potential and behavioural competence are critical to achieve population sustainability (for conservation or other reasons). More individuals breeding in the population reduces the potential population-level risks associated with widely applied controlled reproduction, and leads to a population with: a higher, more predictable and reliable future reproductive potential, a more robust demographic structure, a reduced risk of loss of genetic diversity due to unintended infertility or unsuccessful rearing of offspring, and more expression of breeding, rearing and other complex social interactions typical for the species.
- A thorough understanding of all tools in the population management toolbox, and the benefits and challenges that they present for each taxon, case and situation at hand, is important to make informed decisions about which tool for which case. If ME is selected, this understanding is furthermore important to select which individuals/groups, the appropriate age/time of the procedure, etc. Given the diverse aspects to such decisions, these are best taken by an interdisciplinary institutional team with input from the EEP coordinator, relevant TAG members/advisors, and relevant EAZA committees or working groups.
- The application of management euthanasia is a relevant consideration for all EAZA members, whilst recognising and accepting that the ability, comfort, frequency and taxonomic scope of application will vary between members. Management euthanasia is an important and accepted tool for EAZA population management. This Appendix aligns with and complements other EAZA documents including [section 4.2.9](#) and [Appendix 27](#) of the PMM, the [EAZA Position Statement on Management Euthanasia/Culling](#) [[Appendix 25](#)] and the [EAZA Standards for Welfare, Accommodation and Management](#) of Animals in Zoos and Aquariums.
- As is the case for the other tools in the population management toolbox, careful monitoring, data recording and data sharing can guide progressively more informed decisions to optimise welfare and population biological effects. For example, this can help to evaluate the use of different methods, timings, choice of life stages/sexes/(sub)groups/individuals, etc.; whether it has the intended effects, and whether there are unintended consequences.

## Concluding remarks

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Whether populations are managed to contribute to species conservation and/or to inspire people to care for nature, the importance of doing this successfully further increases in the face of the dual and interacting crises of biodiversity loss and climate change. For the majority of managed *ex situ* populations, success implies being able to maintain a genetically healthy and demographically robust population with good future breeding potential.

Addressing some of the above presented challenges for achieving this, is going to take, among others:

- species-specific assessment, anticipation and response,
- good population management, that takes into consideration the complete EAZA population management toolbox, and
- Institutional Species Plans that are a good reflection of the Regional Species Plans, thus optimising holding space for recommended species and reaching population sizes required to meet the roles and goals set for the populations.

EEP coordinators already a) receive a weeklong basic course; b) have access to online, tailored breeding and transfer recommendation course sessions, as well as written guidance materials and tutorials; and c) get programme-specific help from their assigned population biologist within the EAZA PMC during check-in sessions, RSP preparations and LTMP sessions. Nevertheless, making the right selections from the population management toolbox for each specific species and case, is a big responsibility, is complex, and benefits from multidisciplinary expertise.

The quote “If it takes a village to raise a child, it takes a village to support that child’s parent” by [Ann Douglas](#), could, in EAZA’s population management context, be adapted to “If it takes a community to run an EEP, it takes a community to support that EEP’s coordinator”. EEP management should not be left up to the EEP coordinator alone, but will be more successful with a ‘whole of EAZA-population-management-society’ effort (EEP Coordinators, EEP Species Committee, TAGs, EAZA member institutions, EAZA PMC, relevant EAZA committees and working groups, etc.). A good understanding of the complete EAZA population management toolbox, the important place of management euthanasia within this, and things to be mindful of for each of the tools, is therefore a relevant consideration for all EAZA members. Decisions on the application of any population management tool, including - but not limited to - management euthanasia, should be informed, and tool implementation should be practiced with confidence and competence. There is also a shared responsibility to ensure that use of all the population management tools is monitored, and that required data are recorded and shared, so that population management can be adaptive and improved guidance can be shared.

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## Appendix 27 Veterinary Considerations for Management Euthanasia



*(Document developed collaboratively between EAZA Veterinary Committee and EAZWW)*

This document outlines relevant veterinary considerations for the application of management euthanasia in a zoo and aquarium context. For further information about the scientific background of management euthanasia for population management, and EAZA's position and standards on management euthanasia, EAZA Members can refer to: [Appendix 26 Euthanasia for Population Management: Scientific Background](#) the [EAZA Position Statement on Management Euthanasia/Culling](#); and the [EAZA Standards for Welfare, Accommodation and Management](#) of Animals in Zoos and Aquariums (section 6.4 on Management Euthanasia). Importantly, legislation surrounding Management euthanasia and carcass handling differs among regions, so readers are strongly suggested to keep abreast with national legislation on the subject.

It is beyond the scope of this document to cover all methods of euthanasia across all taxa. An overview of euthanasia methods for many species can be found in "[AVMA Guidelines for the Euthanasia of Animals](#)" (latest edition is 2020). Euthanasia methods must be species appropriate and of course, legal under national or regional legislation, in the country of application.

When performing ME, one must be not only cognisant of the welfare of the animal being euthanised but equally of the welfare of the group members left behind, when relevant. In particular, the timing of ME should ideally correspond to biologically meaningful phases of life, such as the dispersal of juveniles from a natal group, or other natural periods of separation from social groups.

### **Management Euthanasia followed by disposal of the carcass**

Any humane chemical (e.g., barbiturate overdose) or non-chemical method (e.g., gunshot) as used for medical euthanasia is appropriate.

An overview of anatomical sites for venous access in a range of zoo species can be found in the AAZV 2006 '[Guidelines for Euthanasia of Nondomestic Animals](#)'



### **Management Euthanasia with intent to feed the carcass to zoo carnivores**

For euthanasia with the intent to use the carcass for feeding other zoo animals, physical means of euthanasia are preferred: Gunshot, captive bolt shooting followed by exsanguination, and for smaller animals, decapitation, cervical dislocation etc. Anaesthetic induction either with anaesthetic gases or inhalation of CO<sub>2</sub> followed by physical means of killing is also acceptable.

For animals induced through the conventional use of injectable anaesthetic drugs, no safety studies exist. Based on common sense, the following considerations may make the use of such carcass material safe; it should be noted, however, that this is not a *recommendation* to use such material merely an indication that while the carcass will of course still contain drug residue, practical experience shows that this has no clinical implications. These considerations, however, should not be used as an excuse to not focus on establishing physical means of euthanasia for animals that are designated as food for predators.

1. The anaesthetic level aimed for should only be sufficient for the next step.
2. Following anaesthetic induction, the animal must be killed by physical means: gunshot, captive bolt stunning, decapitation followed by exsanguination.
3. Chemical means of euthanasia such as high-dose barbiturates must NEVER be used.
4. After induction, the time of a 'normal' anaesthesia can be awaited prior to killing to allow for maximum possible metabolization of the anaesthetic agents.
5. The injection site (Ø 10-20 cm) is localised and discarded. For increased safety, this area can be increased (e.g. up to the corresponding extremity of injection).
6. The liver should be discarded as a precautionary measure. For increased safety, all internal organs can be discarded.
7. When carcasses generated in this way are fed in several portions to the same predator, this should not be done in sequence but be interrupted by other (non-chemically produced) prey items.
8. The use of carcasses generated in this way depends on the size of the carcass and the predator;
  - a. for example, a rabbit-sized carcass fed, along with several similar-sized pieces of other meat, to a tiger should not require evisceration;
  - b. for a deer-sized carcass fed to a group of lions, where a single animal could in theory gorge only on liver and kidneys, evisceration is advisable.



- c. Generally, carcasses generated via chemical anaesthesia are ideally smaller than the predator they are fed to, or only fed in pieces representing a daily amount of food and not be used in gorge-feeding situations (where the predator is expected to eat more than an average day's amount of food).

Under these precautions, although carcasses will obviously contain drug residues, animals induced with all commonly used agents (highly potent opioids, alpha-2-agonists, dissociative agents such as ketamine, and sedatives) may still be used for feeding.

### **Feeding of carcasses is legal under the Animal By-Products Regulation in the EU**

Within the European Union, carcasses of zoo animals are classified as Category 1 Material under the [EU Animal By-Products Regulation \(Reg. 1069/2009\)](#). Article 18 of this Regulation permits Member State veterinary competent authorities to authorise the feeding of zoo animal carcasses to other zoo animals.

Further details of the approval process and requirement for the competent authority and zoo operator are laid down in Section 4 of the associated Implementing Regulation, [Commission Regulation \(EU\) 142/2011](#).

National legislation relating to the application of ME may negate the general rules above. Readers are strongly advised to keep up to date with national legislation.

### **Further information**

As with other aspects of veterinary management, the EAZA Vet Committee as well as the TAG- and EEP Veterinary Advisors are always ready to provide guidance or establish contacts to others in with relevant experience with comparable situations. Please feel free to contact the Veterinary Committee liaison at the EAZA Executive Office ([info@eaza.net](mailto:info@eaza.net)) if you need supporting with contact details.

## Appendix 28: Guidelines for population management programme administration and handover

### Introduction

Any EEP Coordinator (from here on abbreviated as Coordinator) will spend a lot of time collecting information and gathering knowledge on his or her breeding programme. All this information can also be lost again due to a lack of administration and inadequate handovers. By duplicating efforts, some of this information may be retrievable, but some essential information may be irretrievably lost. Consequences range from a significant waste of time “reinventing the wheel” to structurally undermining the breeding programme’s goals. An important task of any Coordinator is therefore to make sure that, even in worst-case scenarios, all essential administration remains available to the hosting institution and successor. This document was developed to help Coordinators determine whether all essential administration is saved. This is done by providing general tips and a checklist with the most important topics to consider. It is useful for Coordinators to check this list periodically at any time during their breeding programme career and especially while starting with a new programme or stepping down.

**In case of a handover** from the previous Coordinator to the new, ideally, there is a period of overlap during which the two work together, gradually passing on information and allowing time for this information to be assimilated by the new Coordinator. Despite this overlap, a Coordinator will generally still receive a large amount of information at once, of which a portion may be forgotten again if it is not written down. Written information will be even more essential if there is no opportunity for a period of overlap. As departing Coordinator, it is therefore extremely important to determine whether information on at least all topics included in the checklist below are documented, easily interpretable and available to a successor. In some cases, overlap between a previous and new Coordinator will not be possible. In this case, these documents should be shared with the TAG Chair and the EAZA Executive Office (EEO) TAG liaison.

**At any time during their breeding programme career**, Coordinators should be ready for a handover of their breeding programme because practice shows that the departure of a Coordinator is often sudden, e.g. upon changing employment or illness. This means that at least all information included in the checklist provided below is documented and easy to interpret by others. Also, copies of this information should be available to the hosting institution. The ability to access the relevant files is not sufficient. The relevant people at the institution also need to be aware of how they can access them. So far unmentioned, but equally important, are regular backups of all this information.

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## Guidelines for breeding programme administration and handover

### General programme information

Programme	
Name of current Coordinator	
Current supporting EAZA institution	
General comments on transition	
Previous Studbook keepers/Coordinators	Date Span
Were there any gaps where the programme was not managed? If so, please explain when and why	Date Span

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## Checklist

Recording all relevant information in written form avoids it getting lost. Even if there is the chance for a face-to-face handover, complementing this with written notes is much more effective and will be appreciated. Creating these documents will therefore eventually be necessary anyway. It is equally important that it is available to relevant others in case of unexpected events. You can use this checklist to determine whether all essential administration is saved.

General comments on the location or availability of the information

## Studbook

**Comments** (*status and location of information or other*)

- ZIMS Saved Filters available** used to select the managed population  
*e.g. Date span, geographic regions, associations, selection of institutions*

---

- Published studbooks, Annual Reports**

---

- SPARKS dataset used for migration (if lost, can be requested from Species360)**

---

- People currently assigned access to the studbook and reasons why**

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## Institutions

### Comments (status and location of information or other)

- List of **previous, current and potential holding institutions** with contact information  
*List officially approved non-EAZA participants*

---

  - Cooperation with **non-EAZA Members**  
*current, future, potential and yet to be formalised*

---

  - Other partners** of the programme  
*e.g. in situ partnerships, universities*

---

  - All relevant **communication** with holding institutions, potential holding institutions and other partners  
*e.g. transfer and breeding recommendations, emails, institutional wishes, interests, ideas, meetings*

---

  - Agreements** with partners  
*e.g. on future recommendations, practical, political challenges*

---

  - Cooperation** with holding institutions  
*e.g. compliance, language, challenges*
-



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## Management and husbandry

---

### Comments *(status and location of information or other)*

---

#### **Long-Term Population Management Plan(s)**

- Progress towards set goals, outstanding actions*

---

#### **Questionnaires and surveys**

- template and results, e.g. yearly data gathering questionnaires, space surveys, nutrition, husbandry etc.*

---

#### **Best Practice Guidelines/Husbandry guidelines**

- including protocols, e.g. autopsy, genome resource banking, DNA sampling, research, etc.*

---

#### **Demographic and genetic management strategies**

- historic and current*

---

#### **Important social or behavioural considerations**

- at population level and (if relevant) individual level*

---

#### **Individuals potentially permanently excluded from breeding**

- e.g. permanently sterilised, physically unable*

---

#### **Historic management decisions** made, to help understand the development of the population

- e.g. stop breeding, breed, cull, etc.*
-

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**Institutional husbandry differences** affecting management

- e.g. on holdings areas, enclosures, breeding success, plans for future*

---

**Legislation challenges**

- e.g. affecting transport, ownership, MOUs, culling or breeding in country of holding institutions, etc.*

---

**Relevant research activities, material or articles**

---

Date entry conventions

We all differ in the ways we enter data, consciously or unconsciously. You and your successors will be able to interpret the data you entered more accurately and easily if these data entry conventions are documented. If data conventions are already explained in an existing document, please refer to this document in the questions below.

- If you make use of User Defined Fields (UDFs), please explain what they mean, how they are/were used and how they were determined.

UDF	Explanation

- Are all data true/factual in the dataset or have any pedigree assumptions been entered?



- 
- Are there any additional data conventions that a new coordinator needs to be aware of (e.g. related to date of birth/death, pouch/joey date, overall assumptions/rules used on these dates or periods, etc.)? If there have been any deviations from these or other general data conventions, structurally or occasionally, please explain when and how.
  
  - If there are any conventions for the use of studbook numbers or recording of social groups, please provide them.
- 

## Assumptions

### Hypothetical pedigrees or parentage

For all assumptions it needs to be clear on what they are based on. This can be done by adding notes to each assumption within the software or in a separate document. Please make sure to explain where assumption notes can be found or if these do not exist or are incomplete.

- If there are any existing assumptions used for genetic (or demographic) analyses, how and where have these been recorded?**
  - *If in a ZIMS for Studbooks Overlay, please note the name of Overlay.*
  - *if assumptions have been made in the true studbook (not recommended), please elaborately explain which they are and why assumptions have been made.*

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## Contact information

- If there are any existing assumptions used for genetic (or demographic) analyses, how and where have these been recorded?
  - *If in a ZIMS for Studbooks Overlay, please note the name of Overlay.*
  - *if assumptions have been made in the true studbook (not recommended), please elaborately explain which they are and why assumptions have been made.*

- 
- After leaving, any successor may need additional information or explanation. It will be truly appreciated to remain in contact with the new coordinator when possible, so please provide your contact information (*email, phone, etc.*).

Email:

Phone:

---



## Appendix 29: Access Roles in ZIMS for Studbooks

The type of access that a user has to a studbook in ZIMS depends on the Access Role that a user has been assigned for that studbook. Different Access Roles offer different data viewing and editing rights. Access Roles for EAZA based studbooks can be assigned by the EAZA Executive Office to other ZIMS users. In the future it is envisaged that some Access Roles could also be assigned by the Studbook keeper, provided Species360 would indeed develop and launch the functionality to do so.

The EAZA Executive Office has the responsibility for creating Access Roles in ZIMS for Studbooks for datasets held under the EAZA umbrella and the exact type of viewing/editing access that it provides.

Access Role	View Studbook (incl. export to Excel)	Analytical and validation tools	Export to PMx	View Notes	Edit	Assign person Access to studbook	Assigned by
Read only	✓	✗	✗	✗	✗	✗	Studbook keeper
Analytical	✓	✓	✓	✓	✗	✗	EAZA Executive Office
Editing	✓	✓	✓	✓	✓	✗	
Studbook keeper	✓	✓	✓	✓	✓	✓	

The EAZA Executive Office can assign users an Access Role with editing rights (see table). This includes the 'Studbook keeper Access Role'. This role, that grants all editing rights to a studbook, is only assigned to EEP Coordinators that are officially approved in this role by the EAZA EEP Committee.

EAZA (and hopefully in the future also Studbook keepers) can assign two additional roles to others, namely; A 'Read Only Role' and an 'Analytical Role' (see table). These two Access Roles then cater for two different types of users: The 'Read Only Role' provides access for those that are interested in individual or institutional data. The 'Analytical Role' provides access to tools that are useful for analysis of the population. There is a strict procedure who can and cannot be granted access to the data in ZIMS for Studbook and under what conditions. For instructions, please read section [3.11.7 Sharing studbook data within and outside EAZA](#)

An additional editing role that the EAZA Executive Office can assign on request of the Studbook keeper, is that of Editing Access Role, which is similar to the Studbook keeper Access Role, but without the ability to assign Read Only and Access Roles to others.



If you would like to add an Access Role with editing rights to your studbook, this can be done by sending an email to the relevant TAG liaison at the EAZA Executive Office mentioning the name and institution of the person involved and clarifying whether this is a permanent or temporary assignment. If it is a temporary assignment the proposed start and end dates should be included in the request to the EAZA Executive Office.

It is important to stress here that anyone that has the 'Read Only' access role could export the entire studbook to Excel and share it in this form with others. Importantly, only the Studbook keeper and the EEO may share data with others as described in section [3.11.7 Sharing studbook data within and outside EAZA](#).

It is also important to realise that people who will be given access without an end-date, will remain having access permanently.

Access roles can only be assigned to those persons that have their own ZIMS login from Species360. One must never share the log in information to your personal ZIMS account.

#### Tailormade access roles

To cater for exceptional situations, a Studbook keeper can request for the EAZA Executive Office to create an alternative, tailor-made, Access Role and assign this to a person when appropriate. There are 36 different access rights for which viewing/editing rights can be set on or off, so potentially the number of different Access Roles that could be created is enormous. If you would like a specific role made where certain features have been switched on or off, please contact the relevant TAG liaison at the EAZA Executive Office.



## Appendix 30: Template Non-Disclosure Agreement EAZA Studbook Data

# EAZA STUDBOOK DATA NON-DISCLOSURE AGREEMENT

This Agreement is made and entered into by and between **the European Association of Zoos and Aquaria (EAZA)** ("the Discloser") and \_\_\_\_\_ ("Recipient") for the purpose of receiving EAZA Studbook Data from the Discloser to enable the Recipient to undertake the project described at the end of this Agreement ("Project").

Discloser and Recipient hereby agree as follows:

1. "Confidential Information" means any data or proprietary information of the Discloser that is not generally known to the public or has not yet been revealed, whether in tangible or intangible form, whenever and however disclosed. For the purposes of this Agreement, EAZA Studbook Data provided by the Discloser is considered confidential and shall hereafter be referred to as "Confidential Information." This is including but not limited to: animal data (including births, death and transfers), pedigree records, information linked to present and historic holders, notes, and any other materials or information provided or shown to the Recipient irrespective of the form or medium, and includes all documents, records, notes, or other material containing or based on information included in the foregoing.
2. No information will be Confidential Information that:
  - i. is already known to Recipient, or
  - ii. is or becomes publicly known through no wrongful act of Recipient, or
  - iii. is received by Recipient from a third party without similar restrictions and without breach of this Agreement.
3. Recipient acknowledges and agrees that the Confidential Information is and shall remain the exclusive, valuable property of the Discloser. Recipient will not use any Confidential Information other than in connection with the Project.
4. Recipient agrees not to disclose Confidential Information to any third party (individual, Discloser, corporation, or other entity) or to use Confidential



Information for any purpose other than the reasons mentioned in the Project in the section 'Description of the Project' below.

5. Recipient may disclose Confidential Information
  - i. to other Recipients who have executed non-disclosure agreements with Discloser,
  - ii. in response to the lawful request or requirement of a governmental agency or by requirement of law, and
  - iii. where applicable to the Recipient's Project supervisor, provided that supervisor has signed a non-disclosure agreement with Discloser.
6. Discloser [agrees /does not agree] for the Recipient to give a substantive presentation concerning the Project to an audience that will not have signed non-disclosure agreements, and that such presentation will include information about the Discloser. When agreed Discloser will work with Recipient to prevent the inclusion of Confidential Information in the presentation and any written materials prepared by the Recipient.
7. If peer-reviewed publication is (part of) the purpose as described in the 'Description of the Project', Recipient may publish material relating to the conduct and conclusions of the Research, including the Deliverables, provided that Discloser is acknowledged in the publication and provided prior to publishing any such material the Recipient will:
  - i. not publish any data is traceable to individual animals or institutions unless there is explicit written approval from the Discloser to do so.
  - ii. provide a copy of all proposed publication material, together with details of how, when and to whom it is proposed to be published, for the approval of Discloser at least 30 days prior to the proposed submission date for publication ("Approval Period").
8. If, during the Approval Period, Discloser reasonably requests that the material not be published or submitted for publication in the form provided, the Recipient will:
  - i. where Discloser requests that the material be amended to remove any of their Confidential Information, use all reasonable efforts to amend the proposed publication material to remove all such Confidential Information in which case Discloser will be deemed to have approved publication or submission of the amended material by the Recipient; and
  - ii. if requested, delay publication of the material or submission of the material for publication for a period not exceeding 90 days.
9. If Discloser withholds approval or requests changes under this clause it must provide reasons. Discloser will be deemed to have approved the publication



or submission of material if the Discloser does not communicate to the Recipient its decision regarding approval of the publication, with reasons if applicable, within the Approval Period.

10. All Confidential Information delivered by Discloser to Recipient will be and remain property of Discloser. All Confidential Information, and any copies thereof, will be promptly returned to Discloser or destroyed by Recipient upon Discloser's request.

11. The obligations of Recipient under this Agreement shall terminate on \_\_\_\_\_.

12. This Agreement may not be modified except by written instrument signed on behalf of each party. Either party may assign this Agreement to a parent corporation, to a wholly owned subsidiary or a successor of substantially all of the business or assets of the party. This Agreement embodies the entire agreement and understanding of the parties and terminates and supersedes all prior independent agreements and under takings between the parties. The provisions of this Agreement shall be construed in accordance with the laws of The Netherlands. All notices, requests or consents given in connection with this Agreement shall be given in writing and sent by first class mail, postage prepaid, telegram, teletype, telex, cable or email to the addresses listed at the end of this Agreement, unless either party notifies the other party of a different address.

Description of Project:

\_\_\_\_\_

Executed as of the date and year first above written:

Discloser's Signature \_\_\_\_\_ Date

\_\_\_\_\_  
Print Name \_\_\_\_\_

Recipient's Signature \_\_\_\_\_ Date

\_\_\_\_\_  
Print Name \_\_\_\_\_

## Appendix 31: EAZA and the Nagoya Protocol



Photo © Frank Vassen

### EAZA and the Nagoya Protocol: A guidance document for Members

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## Executive Summary

**This document provides guidance for EAZA Member zoos and aquariums about the compliance with the Nagoya Protocol in relation to the *ex situ* conservation work undertaken by our community. Specifically, it will guide you through the rules that the European Union has adopted for compliance with the Nagoya Protocol. These EU compliance rules are obligatory to follow if your institution is based in the EU and can be a useful point of reference if you are located outside the EU.**

The [Nagoya Protocol](#) is an international agreement that supplements the [Convention on Biological Diversity \(CBD\)](#). Adopted on 29 October 2010 in Nagoya, Japan and in force since 12 October 2014, it creates the legal framework for the implementation of the third objective of the CBD: the fair and equitable sharing of benefits arising from the utilisation of genetic resources.

In the European Union, individual Member States develop the rules of access and benefit sharing for genetic resources. What exists on the joint EU level are rules about how users must comply with access and benefit-sharing, i.e. what permits and documents must be in place. These compliance rules are enacted through the [EU ABS Regulation](#), also known as Regulation (EU) No 511/2014.

The obligation for zoos to undertake *ex situ* conservation work is mandated by [Article 9 of the CBD](#). In the EU, it is legislated by Article 3 of the [EU Zoos Directive](#), also known as Council Directive 1999/22/EC.

In general, in EAZA's view, *ex situ* management programmes for the maintenance of genetic diversity, e.g. EAZA Ex Situ Programmes (EEPs) alongside the cryopreservation and "biobanking" of genetic materials, are outside the scope of the EU ABS Regulation. However, there are instances where we would consider that genetic research undertaken on genetic material of certain individual animals or populations is inside the scope of the EU ABS Regulation.

Even if an area of work with a genetic resource is outside the scope of the EU ABS Regulation, it may be subject to national ABS legislation. Implementation of the Nagoya Protocol varies from country to country, and in some countries the national laws may go beyond the minimum standards required by the Protocol. Therefore, we recommend that users always check the national rules that are in place.

The sector-specific flowchart on page 4 (and explanatory details in case studies specific to zoos and aquariums from page 13 onwards) will allow you to quickly assess which areas of your work with genetic resources are, in our opinion, inside or outside the scope of the EU ABS Regulation.

The EU ABS Regulation also makes provision for utilisation of traditional or indigenous knowledge. Whilst this is not a key focus of our *ex situ* conservation

All forms/templates are available to download on the EAZA Member Area

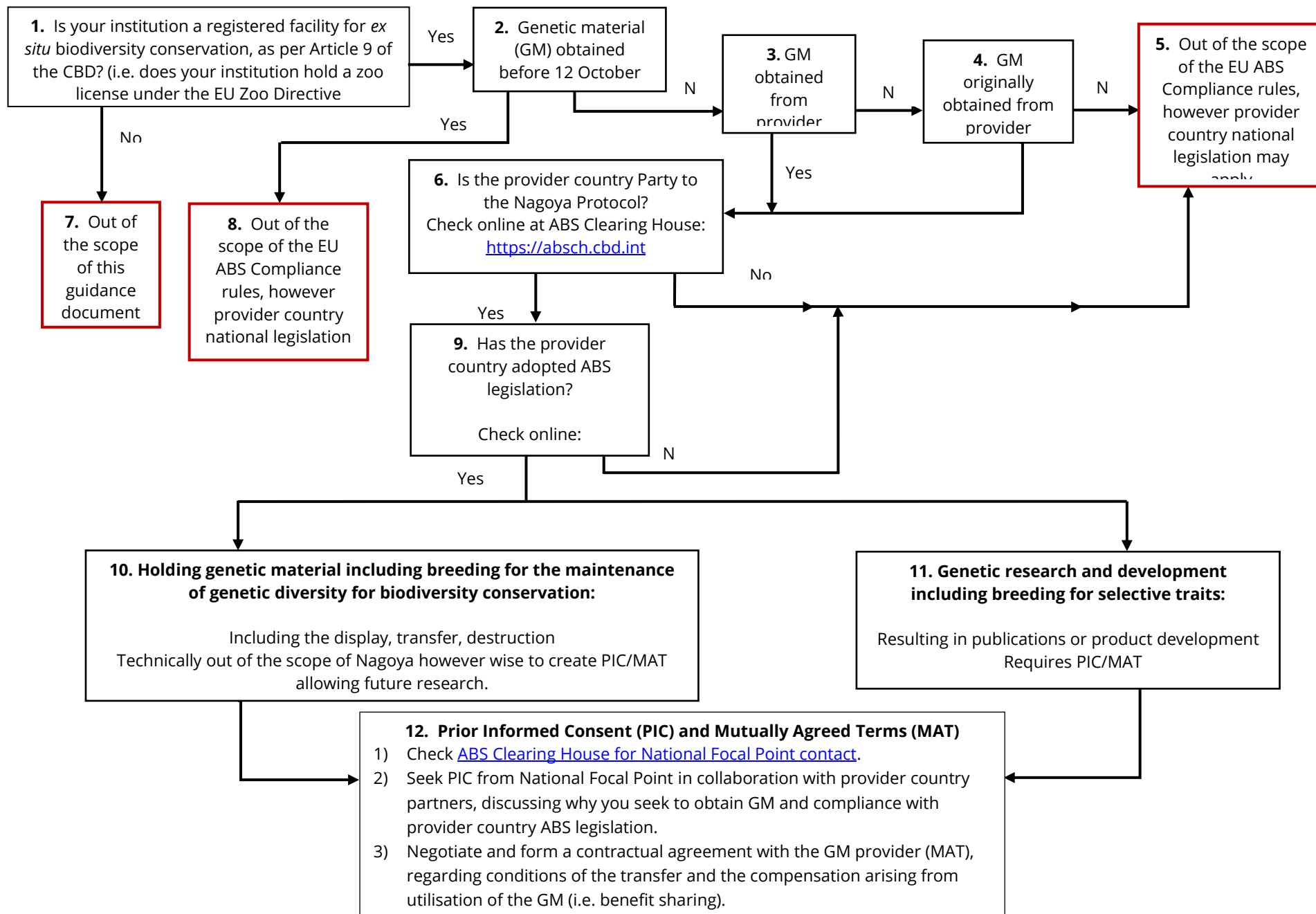


work, if traditional knowledge associated with genetic resources were to be utilised, the same flowchart could be used.

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Flowchart

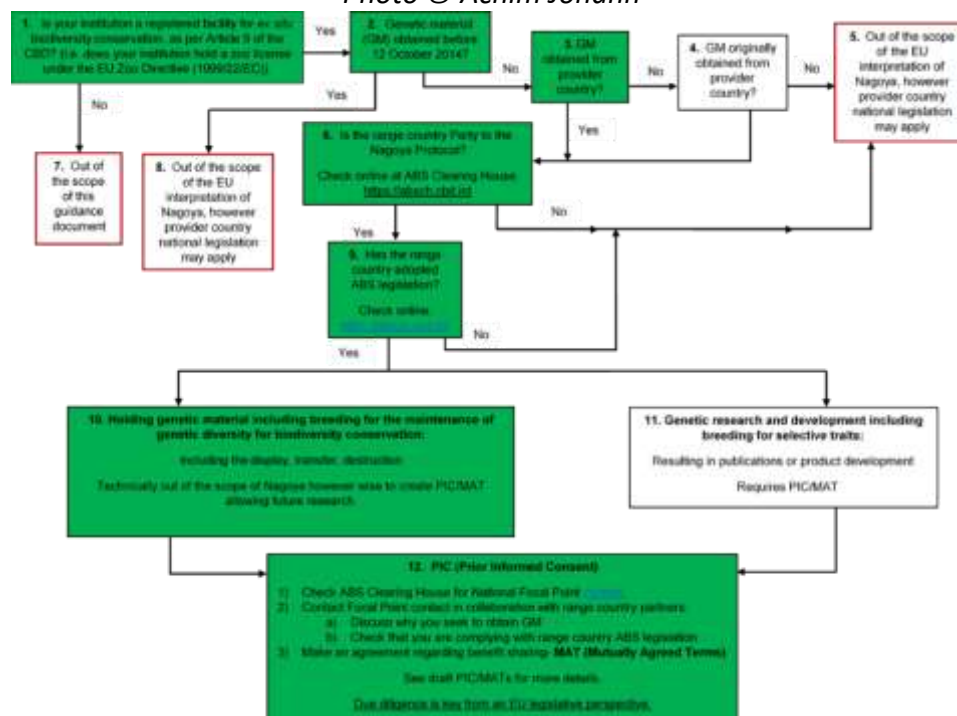


### Case Study 1: Augmenting an *ex situ* management programme

In 2019, a group of Greater bamboo lemurs (*Prolemur simus*) were imported from an *ex situ* facility in Madagascar to an EAZA Member zoo, located in the EU.  
This import was undertaken with the aim of augmenting the pre-existing Greater bamboo lemur EEP with fresh bloodlines and increasing the European *ex situ* population's genetic diversity.



Photo © Achim Johann



- **Box 1:** The importing zoo is a licensed zoo as per EU Zoo Directive (1999/22/EC).



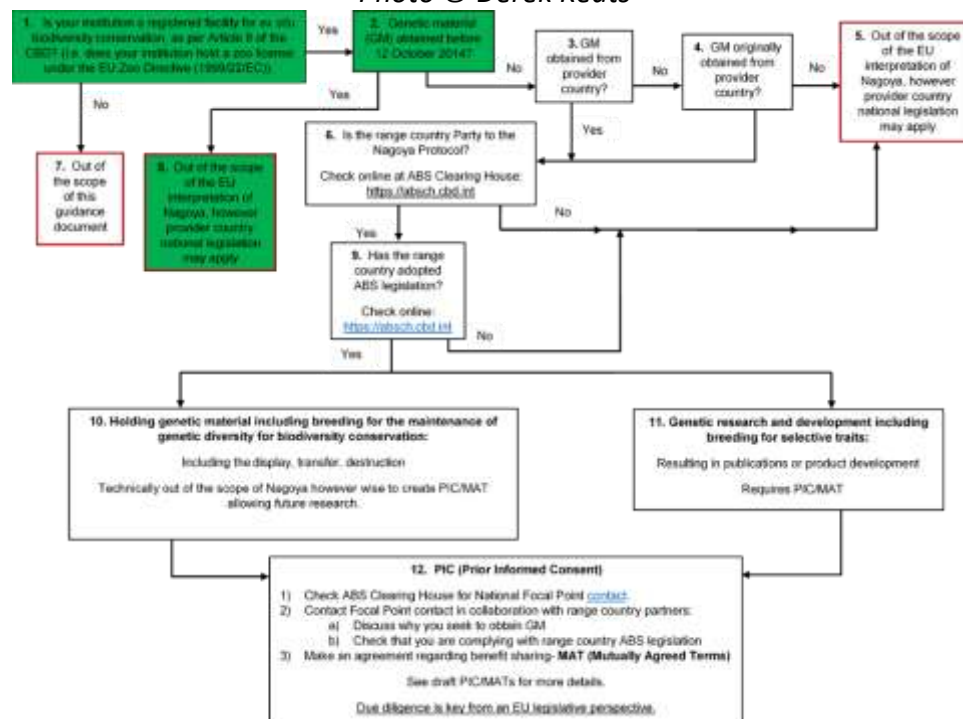
- **Box 2:** The import of the Greater bamboo lemurs was undertaken after October 2015; therefore, EU ABS Compliance Rules may apply.
  - **Box 3:** The genetic material (i.e. the live primates) was obtained from a provider country.
  - **Box 6:** Madagascar is a Party to the Nagoya Protocol since 12 October 2014.
  - **Box 9:** Madagascar has developed and adopted ABS legislation:  
<https://absch.cbd.int/pdf/documents/absNationalReport/ABSCH-NR-MG-238714/1>
  - **Box 10:** Although we view ex situ management programmes as falling outside the scope of the EU ABS Regulation, we would recommend that the importing institution, in communication with the relevant EAZA TAG and EEP coordinator, seek PIC and MATs prior to the import of the lemurs, via contact with the National Focal Point for Madagascar (Box 12). The MAT developed should allow for the potential for future genetic research on the imported animals and allow for the sharing of benefits arising from such research.
-

## Case Study 2: A species maintained long-term in captivity, with no formalised management programme

In 2018, an EAZA Member institution receives a group of meerkats that were bred in human care in Europe and are derived from founders that came into non-range country zoos many generations ago. Meerkats (*Suricata suricatta*) are a popular exhibit species within EAZA zoos. The species has been bred and maintained in captivity for decades and is not subject to an *ex situ* management programme at national or European regional level (e.g. EEP).



Photo © Derek Keats



- **Box 1:** The zoos which this document concerns are all licenced as per EU Zoo Directive (1999/22/EC).

All forms/templates are available to download on the EAZA Member Area



- **Box 2:** The genetic material (i.e. live meerkats) were originally imported into European zoological collections pre-October 2014 and then have been successfully bred and maintained in captivity for decades.
- **Box 8:** The genetic material is outside the scope of the EU ABS Compliance Rules.

Although meerkats are not part of an organised EAZA management programme, we would consider that those zoos which do keep this species, would be breeding them at institutional or regional level to maintain group genetic diversity, rather than for the selection of specific genetic traits. Therefore, such animal breeding is excluded from the definition of 'utilisation'.

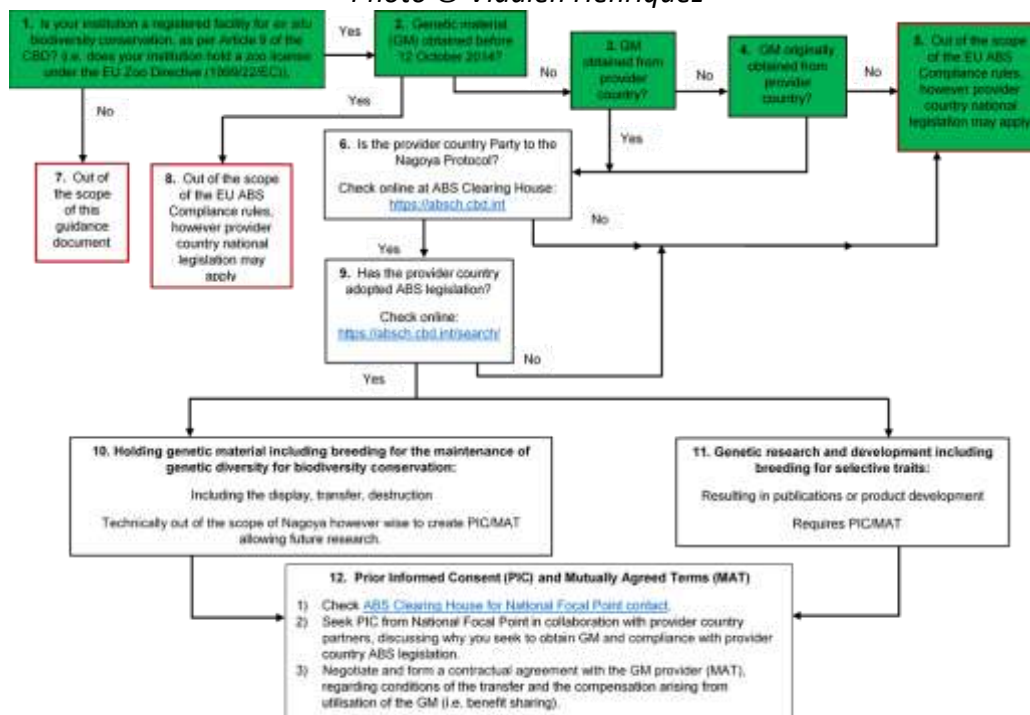
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## Case Study 3a: A species bred in EAZA region and then exported to non-EAZA region, non-EU facility

A group of Critically Endangered Morelet’s leaf frogs (*Agalychnis moreletii*) are being exported from an EAZA Member zoo in France to a zoo outside the EAZA region, in South Africa. The frogs in this group all descend from founder animals imported from Mexico in 2015. The flowchart below concerns the movement of the Morelet’s leaf frogs to South Africa.



Photo © Vladlen Henríquez



- **Box 1:** The zoos which this document concerns are all licenced as per EU Zoo Directive (1999/22/EC).



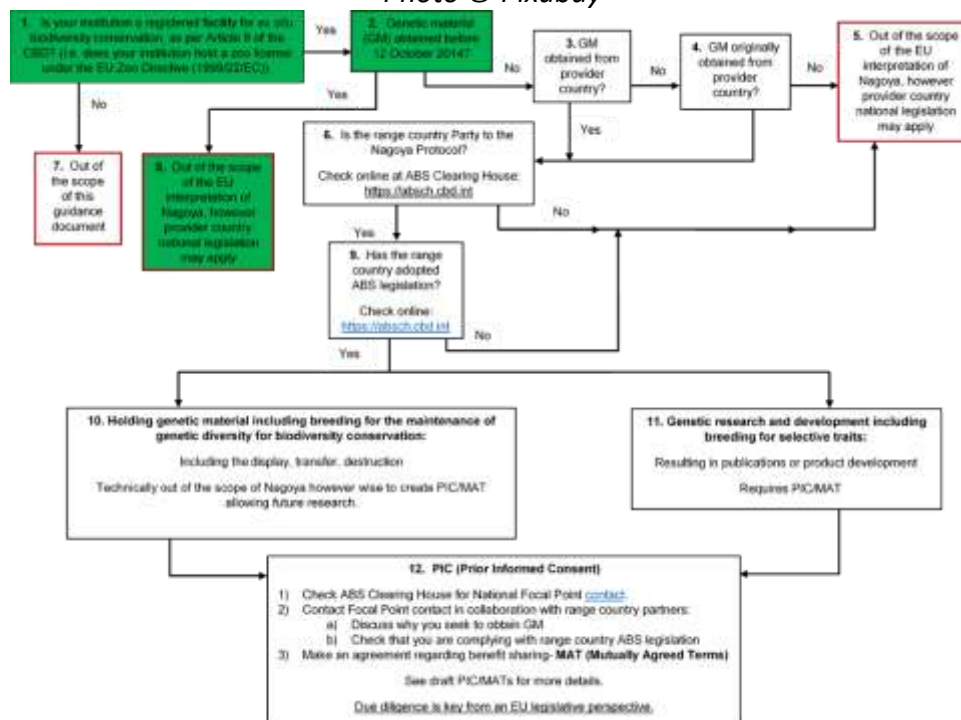
- **Box 2:** The genetic material (i.e. the frogs) were imported into European zoological collections after October 2014.
- **Box 3/4:** The genetic material was not obtained from a provider country, as the frogs were bred in France.
- **Box 5:** This case is outside of the scope of the EU ABS Regulation (unless it was agreed in the MAT that it should also apply to the descendants). Despite this, the importing South African zoo would have to comply with any relevant national ABS legislation in force and undertake appropriate due-diligence actions as required.

## Case Study 3b: A species bred in EAZA region and then exported to an EAZA Member, non-EU facility

A pair of captive bred Endangered okapi (*Okapia johnstoni*) are being exported from an EAZA Member zoo in Germany to an EAZA Member zoo in Singapore. The pair being exported are descendants from founder animals brought into Europe from the Democratic Republic of Congo, pre-2014. The flowchart below concerns the movement of the okapi to Singapore.



Photo © Pixabay



- **Box 1:** The zoos which this document concerns are all licenced as per EU Zoo Directive (1999/22/EC).



- **Box 2:** The genetic material (i.e. the founders of the *ex situ* okapi population) were imported into European zoological collections before October 2014.
  - **Box 8:** This case is outside of the scope of the EU ABS Regulation as the okapi founders were imported prior to the formation of the Nagoya Protocol and the EU ABS Regulation. Despite this, the importing Singaporean zoo would have to comply with any relevant national ABS legislation in force and undertake appropriate due-diligence actions as required.
-

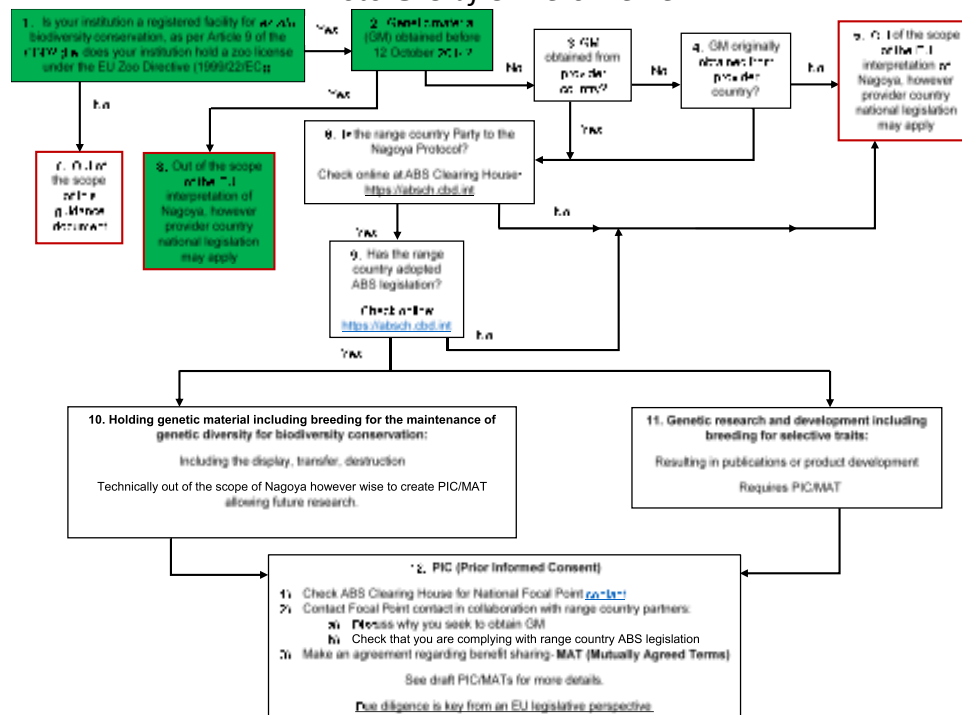
## Case Study 4a: Bio-banked genetic material, imported before October 2014

A blood sample has been taken from a male Sulawesi wrinkled hornbill (*Rhyticeros cassidix*) for cryopreservation in the EAZA Biobank in 2019. The hornbill was imported to the EU legally from Indonesia in 1988.

In biobanking cases, the genetic material is the source animal (i.e. the hornbill) and not the blood sample.



Photo © Olaf Oliviero Riemer



- **Box 1:** The hornbill is kept at a licenced zoo as per EU Zoo Directive (1999/22/EC).

All forms/templates are available to download on the EAZA Member Area



- **Box 2:** The genetic material (i.e. the hornbill) was imported before October 2014.
  - **Box 8:** Due to being imported before the EU being signatory to The Protocol, this case would be outside of the scope of the EU ABS Compliance Rules.
-

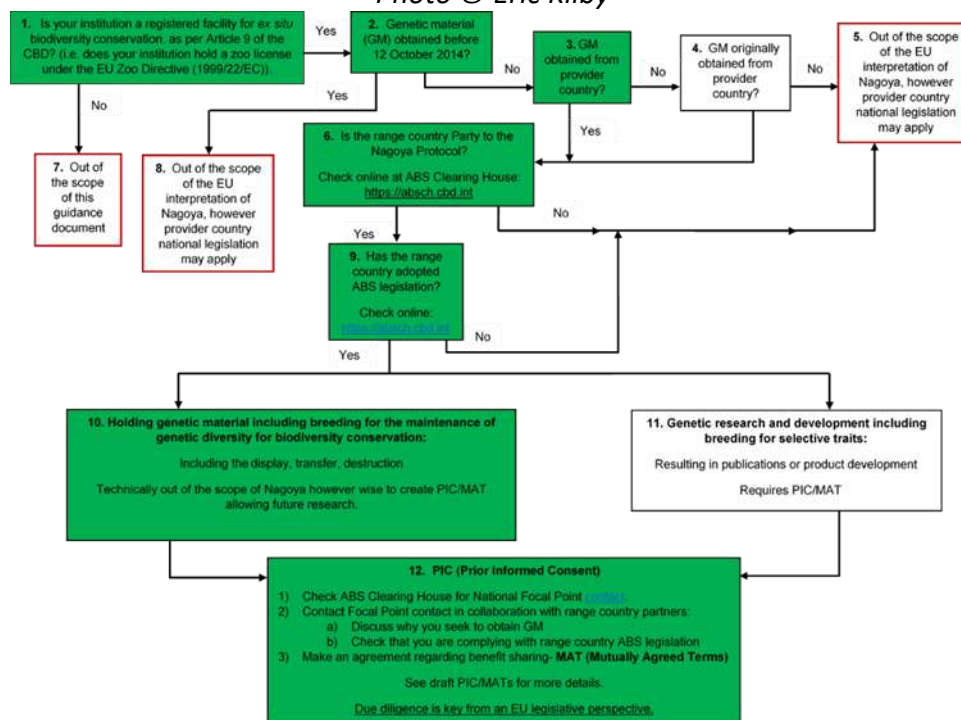
## Case Study 4b: Bio-banked genetic material, imported after October 2014

Blood samples are being taken from a group of babirusa (*Babyrusa babyrussa*) at an EAZA zoo in 2019. These samples are to be sent for cryopreservation in the EAZA Biobank. The animals in the group were imported into Europe from Indonesia in 2019 as part of the Global Species Management Plan.

No current plans exist for research on these samples within the EAZA Biobank.



Photo © Eric Kilby



- **Box 1:** The importing zoo is a licensed zoo as per EU Zoo Directive (1999/22/EC).
- **Box 2:** The import of the genetic material was undertaken after October 2014; therefore, ABS Compliance Rules may apply.



- **Box 3:** The genetic material (i.e. the babirusa) was obtained from a provider country.
- **Box 6:** Indonesia is a Party to the Nagoya Protocol since 12 October 2014: <https://www.cbd.int/countries/?country=id>
- **Box 9:** Indonesia has partially adopted ABS principals through existing national legislation and the government is preparing a draft ABS law according to Nagoya Protocol: <https://absch.cbd.int/pdf/documents/absNationalReport/ABSCH-NR-ID-239223/1>
- **Box 11:** Although biobanking (as well as conservation breeding) falls outside the scope of the EU ABS Regulation, we would recommend that PIC and MATs are established prior to the import of the live animals, via contact with the National Focal Point for Indonesia (Box 12). The MAT should ideally allow holding institutions in Europe to retain the ability, under specified conditions, to undertake (certain types of) future genetic research on the genetic material imported and any subsequent progeny produced. It may be beneficial for the application/negotiation for the PIC and MAT at the time of importation to be carried out by the importing institution in consultation with the relevant EAZA TAG and EEP coordinator.

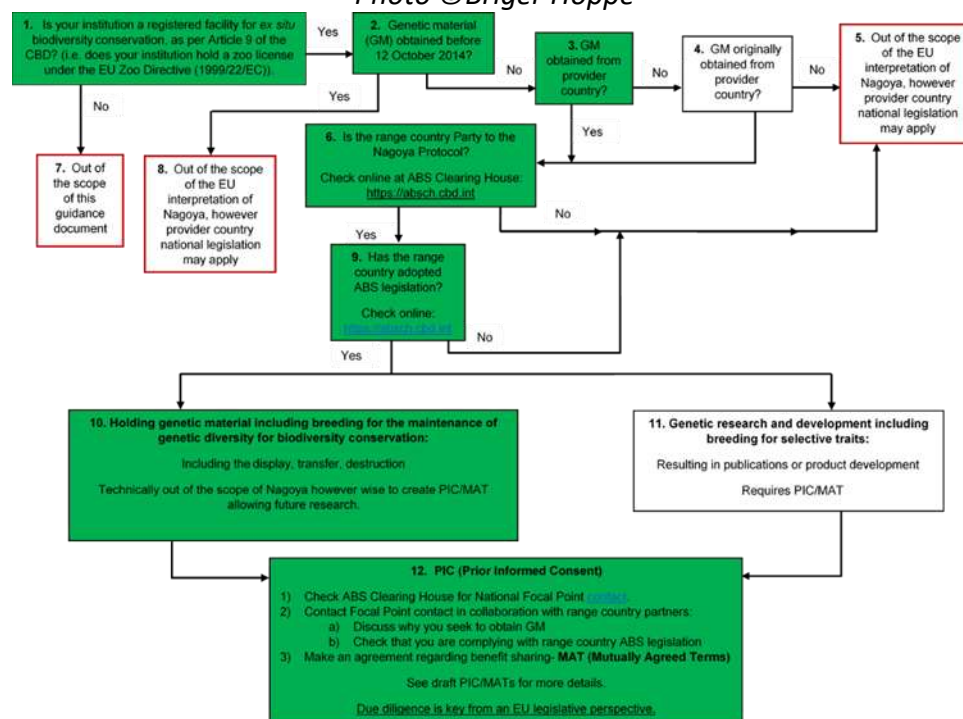
## Case Study 5: Gametes and assisted reproduction

Artificial insemination and assisted reproductive techniques are increasingly being used across a number of zoo species<sup>16,17</sup>.

In 2020, a trial import of frozen semen originating from a bull Mishmi takin (*Budorcas taxicolor taxicolor*) kept in *ex situ* facilities in Bhutan will be undertaken by an EAZA zoo to increase the genetic diversity in the herd held at the zoo and the wider EEP population.



Photo ©Briger Hoppe



- **Box 1:** The importing zoo is a licensed zoo as per EU Zoo Directive (1999/22/EC).



- **Box 2:** The import of the genetic material was undertaken after October 2014; therefore, EU ABS Compliance Rules may be applicable.
  - **Box 3:** The genetic material was obtained from a provider country.
  - **Box 6:** Bhutan is a Party to the Nagoya Protocol since 12 October 2014: <https://absch.cbd.int/countries/BT>
  - **Box 9:** Bhutan has adopted ABS principals through the formation of the ABS Policy of Bhutan 2015, with PIC being required prior to accessing in range genetic materials: <https://absch.cbd.int/pdf/documents/absNationalReport/ABSCH-NR-BT-238700/1>
  - **Box 11:** Although the aim of this project is related to breeding and *ex situ* management and therefore falls outside the scope of the EU ABS Regulation, we would recommend that PIC and MATs are sought prior to the import, via contact with the National Focal Point for Bhutan (Box 12). The MAT developed should, ideally, allow holding institutions in Europe to, under specified conditions, retain the ability to undertake (certain types of) future genetic research on the genetic material imported and any subsequent progeny produced. It may thus be beneficial for the application/negotiation for the PIC and MAT at the time of importation to be carried out by the importing institution together with the relevant EAZA TAG and EEP coordinator.
-



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## Appendix 32 Example of Conservation Translocation project checklist

*This Appendix provides an example of the Conservation Translocation checklist referred to in section 4.3. Please use the [online form](#) to submit your project checklist*

### Section 1

**The TAG** is responsible for reviewing the quality of the conservation translocation project and assessing its alignment with relevant conservation goals. TAGs are encouraged to seek advice and support from the **Conservation Translocation Working Group** to assist in this review process. **The EEP Committee** holds final responsibility for approving such translocations and verifying that all key considerations have been addressed and that appropriate supporting documentation is in place. **The EEP Coordinator and Species Committee** are responsible for selecting and recommending the individual animals for release, with support from the **EAZA Population Management Centre (PMC)** as needed. This form must be completed by the TAG and submitted to the EEP Committee when seeking final approval for a conservation translocation involving animals from an EEP.

1. Name of TAG
2. Name of TAG chair/vice – chair(s)
3. Name of EEP
4. Name of Coordinator
5. Is the Conservation Translocation aligned with the roles and goals as set for the EEP as part of the TAG's Regional Species Plan and Long Term Management Plan (if in place)?
  - Yes
  - No
6. If no, please explain
7. Has there been sufficient consideration given towards avoiding negative impact of releases of EEP animals for the ex situ population? (E.g has this been considered during the LTMP or in consultation with EAZA PMC)
8. Is there a conservation action plan (or equivalent) in place that points to the need for Conservation Translocation in support of the species survival in the wild?
  - Yes, please make sure to upload the plan
  - No



9. If no, please explain
10. Is there a project proposal documenting that the proposed Conservation Translocation is in accordance with the IUCN Guidelines for the Reintroduction and other Conservation Translocations (including e.g. release techniques, pre- and post- release monitoring, biosecurity/disease transmission risk, safety of human populations, financial security of the project)
  - Yes, please make sure to upload the plan
  - No
11. If no, please explain
12. Is the Conservation Translocation supported by the relevant IUCN SSC Specialist Group and/or other appropriate conservation authority?
13. Is the Conservation Translocation supported by the range state authorities?

## Section 2: Formal agreements

The EAZA Executive Committee is responsible for approval of and endorsing formal agreements related to Conservation Translocations, upon prior approval from, and as proposed by, the EEP Committee. For example, Memoranda of Understanding describing commitments of EAZA and other partners in relation to the Conservation Translocation. Such agreements do not have an EAZA status if these are not approved by the Executive Committee and signed by the EAZA Chair.

14. Have you considered whether a formal agreement such as a Memorandum of Understanding (MoU) is needed between EAZA/EEP and the project partners? Please explain why you think this is (or is not) necessary in this case. If you already have a draft agreement, please upload it to support the Committee's approval process in Q 15
15. Please upload the following documents: action plan (Q8), project proposal (Q10) and draft MoU (Q14) to this folder <https://tinyurl.com/4wujsnke>  
Please label the documents with your name