

(066–068) Proposals regarding type designation requirements (amendments to Articles 7 and 9)

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At least five different Articles in the *Shenzhen Code* (Turland & al. in *Regnum Veg.* 159. 2018) impose conditions on the designation of a lectotype (or its equivalent in Art. 10), neotype or epitype. Yet the language used is rather different. Articles 9.21, 9.22 and 9.23 state the type “is not effected unless” the applicable condition is met. In clear contrast, Art. 7.10 and 7.11 state “For purposes of priority (Art. 9.19, 9.20, and 10.5), designation of a type is achieved only” if the applicable condition is met. The only apparent reason for the difference is that the language was proposed by different authors.

The language in Art. 7.10 and 7.11 is a bit troubling. Article 7.10 provides that types (other than holotypes) must be effectively published. Apparently some thought a type could be established merely by writing “type” on the specimen. However, the “for purposes of priority” implies that a type can be designated for other purposes without effective publication. One interpretation might be that writing “type” on the specimen makes it a lectotype that is permanently attached to the name (Art. 7.2), but because it is not effectively published anyone can later supersede it. That hardly seems like a desirable result.

Similarly, the proposal adding what is now Art. 7.11 (McNeill in *Taxon* 35: 873–874, prop. (292). 1986) said it set forth the minimum requirements to designate a type. Again, the “for purposes of priority” language implies otherwise.

(066) Amend Art. 7.10 as follows (new text in bold, deleted text in strikethrough):

“7.10. ~~For purposes of priority (Art. 9.19, 9.20, and 10.5), designation~~ Designation of a type is **not achieved unless made in an only** by effective publication.”

(067) Amend Art. 7.11 as follows (new text in bold, deleted text in strikethrough):

“7.11. ~~For purposes of priority (Art. 9.19, 9.20, and 10.5), designation~~ Designation of a type is **not achieved only if unless** the type is definitely accepted as such by the typifying author, **if** the type element is clearly indicated by direct citation by including the term “type” (typus) or an equivalent and on or after 1 January 2001, ~~if~~ the typification statement includes the phrase “designated here” (hic designatus) or an equivalent.”

Make a conforming change in Art. F.5.4.

Various rules in Art. 9 state a designation is not “effected” unless certain conditions are met. In order to be consistent with Art. 7.10 and 7.11, “achieved” is substituted for “effected”.

(068) Amend Art. 9.21 as follows (new text in bold, deleted text in strikethrough):

“9.21. Designation of an epitype is ~~not effected~~ **achieved** unless the herbarium, collection, or institution in which the epitype is conserved is specified or, if the epitype is a published illustration, a full and direct bibliographic reference (Art. 41.5) to it is provided.”

Make conforming changes in Art. 9.9, 9.22 and 9.23.

(069) Recommendation for adding photographs of type specimens to the protologues of new names of taxa at the rank of species or below

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Article 7 of the *Shenzhen Code* (Turland & al. in *Regnum Veg.* 159. 2018), dealing with typification, ends with the Recommendation

7A.1, “It is strongly recommended that the material on which the name of a taxon is based, especially the holotype, be deposited in a public

herbarium or other public collection with a policy of giving bona fide researchers access to deposited material, and that it be scrupulously conserved.” I propose to add a further Recommendation.

(069) Add a new Recommendation 7B to read as follows:

“7B.1. It is strongly recommended that the protologue of the name of a new taxon at the rank of species or below include at least one photograph of the mounted holotype with its label.”

To my mind, adding even the simplest photographs would improve the utility of type material for current and future researchers, not to mention Artificial Intelligence (machine reading, machine learning). It might also help improve the quality of labels.

Acknowledgement

I thank John McNeill for his encouragement and Nicholas Turland for improving my wording.

(070) Proposal to add a new Example after Article 9 Note 6 to illustrate when the term “holotype” cannot be corrected

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Some confusion may arise regarding the application of Art. 9.10 of the *Shenzhen Code* (Turland & al. in *Regnum Veg.* 159. 2018). When the term “holotype” is misused, it can be corrected (to lecto-, neo- or epi-type). For this, the requirements of Art. 7.11 must be met. While Art. 9 Ex. 11 illustrates when the misused term “holotype” can be corrected, there is no Example illustrating when the term cannot be corrected. Although Art. 7.11 is clear, and a typification statement on or after 1 January 2001 must include the phrase “designated here” or an equivalent, adding an Example after Art. 9 Note 6 could be clarifying. Hence, I feel that the following new Example should be included in the *Code*.

(070) Add a new Example after Art. 9 Note 6:

“*Ex. n.* Bohley & al. (in *Syst. Bot.* 42: 138. 2017) cited the specimen *Balansa 2263* (G) as the “type” and “holotype” of *Cypselea*

meziana K. Müll. (in *Bot. Jahrb. Syst.* 42(Beibl. 97): 72. 1908). However, this use of the term holotype cannot be corrected to lectotype because the requirement of Art. 7.11 to include, on or after 1 January 2001, the phrase “designated here” or an equivalent was not met. As a consequence, designation of a lectotype was not achieved until Jocou & Minué (in *Phytotaxa* 461: 69. 2020) wrote “Lectotype (designated here)” selecting a specimen from the same *Balansa* gathering in P.”

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I thank N.J. Turland for the suggestions that improved this proposal.

(071) Proposal for accountability in designating types based on virtually seen original material

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Online databases have provided considerable advantages to many fields of investigation, including plant taxonomy. Despite the positive impacts of digital resources for taxonomists, especially in providing

ease of access to information regarding literature and (potential) type specimens, there can be surprising negative consequences. In recent years there has been a very significant increase in the number of papers