

## (025–027) Proposals to amend Article 41 for incorporating different styles of bibliographic citations

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For the valid publication of a new combination, name at new rank, or replacement name, Art. 41.5 rules that on or after 1 January 1953 a full and direct reference is required to the page or pages where basionyms or replaced synonyms were validly published. The prevailing custom of providing such references has been to give all the relevant bibliographic information, that is the basionym or replaced synonym itself, its author citation, title of the publication or periodical in which an article appears, edition, volume and issue numbers (if any), page or plate reference, and the year of publication. Standard conventions have been developed for abbreviating some of this information, permitting it to be condensed in order to save space.

If properly standardized, this bibliographic information may be treated as full and unambiguous. Still, strictly speaking, such abbreviated references are not direct, although they have been traditionally accepted as such, because to determine the full title from an abbreviated title one must consult additional references, such as the second edition of *Taxonomic Literature* (TL-2) and its supplements for book titles and further bibliographic information and *BPH-2* for journal titles and bibliography. Incompletely or incorrectly abbreviated citations, although formally acceptable under Art. 41.5, may pose a serious problem in searching for the place of valid publication indicated by such citations. Besides, the main standard reference books are incomplete and consequently some citations are created ad hoc by the authors, sometimes leading to puzzles when the sources cited are little known or obscure or the abbreviation is ambiguous. Standardizing abbreviations of titles in other than the Latin alphabet may also pose problems. For instance, abbreviations of original Cyrillic titles or their alternatives in other languages, although in wide use, usually do not comply with the standards of TL-2 and BPH-2. Furthermore, citations of the authors of plant names, which are an essential part of the bibliographical reference, may be unclear if not standardized according to Brummitt & Powell's *Authors of Plant Names* (now being continuously updated as part of the International Plant Names Index, IPNI, <http://www.ipni.org>).

To avoid problems of cryptic notations in such traditional “full and direct” references, some botanical periodicals, most notably the *Nordic Journal of Botany* and *Phytotaxa*, are using the international citation style for bibliographic references in place of traditional nomenclatural citations. In such cases basionyms or replaced synonyms are cited as required in Art. 41.5 (last sentence); plant name authors, unless different from the authorship of the publication, are never abbreviated and are accompanied by the year of publication to form a standard bibliographic reference, with a full and precise

citation placed in the list of references at the end of the paper. Page or plate numbers are provided to make the citations direct as required in Art. 41.5 Note 1.

We argue that this style of reference to basionyms or replaced synonyms is not only full and direct as required by Art. 41.5, but also is in compliance with other provisions of the Code. Unlike the traditional style of nomenclatural citations, this style is the only one that provides truly full and unambiguous reference to the places of valid publication without the need to decipher abbreviations explained in other separately published sources.

Citing nomenclatural papers in the list of references instead of only in the text has an additional benefit. Papers cited in the text are not counted in citation ratings, whereas papers cited in references are. The convention of citing nomenclatural and taxonomic literature in text rather than in references has resulted in low citation ratings for papers dealing with nomenclature and taxonomy, particularly papers in which new species have been published. This has additionally resulted in extremely low personal citation rates for researchers in taxonomy, depressing their associated H-factor and reducing their competitiveness in funding opportunities. Additionally, many botanical journals have decided not to publish papers solely dealing with new species because such papers attract few citations and thus have a negative effect on the journal's impact factor, and those journals that do publish these articles are viewed as performing poorly in the eyes of authors and evaluators of academic performance. Citation ratings are especially important for young scientists trying to establish themselves in the field of taxonomy, who find it increasingly difficult to get their research funded in a field that is seen by other biological sciences and other fields using plant names as not worth citing. It is not a good use of their time to write papers that are poorly cited simply due to the convention of in-text citation (or no citation of taxonomic papers at all, which is the convention in many non-taxonomic biological journals). Compare this with the frequent citations of newly found chemical compounds in chemistry journals, and the bleak situation for taxonomy becomes evident. Including full citations of taxonomic papers in the references, which will then be listed as citations in search engines and more likely be encountered by other researchers of the same organisms unfamiliar with the field of taxonomy, will help solve one part of this problem. We would even go further and state that the style of including full references in taxonomic and nomenclatural papers (currently not done by many taxonomic and nomenclatural journals including *Taxon*) contributes to plant taxonomy and nomenclature as a bibliographic resource, making papers more likely to be read and cited and pushing authors of

these papers to verify the bibliographic sources. Unfortunately in the traditional fashion of citation many authors routinely copy protologue abbreviations from indices like *IPNI* and *Tropicos* without verifying the text of the original publication.

Although complying with the rules and being in wide use, both types of citations, the “traditional nomenclatural” style and the “bibliographic citation” style, are still not explicitly explained in the *Code*. We aim at filling this omission by proposing a new Note under Art. 41 with examples illustrating both styles. In addition, we propose to adjust Recommendation 41A.1 accordingly and to introduce a new Recommendation 41B explicitly promoting the consistent use of recognized standards in cases where the author citations and publication titles are abbreviated.

**(025) Add a new Note with two new Examples after Art. 41.5 to read:**

“*Note Ibis*. Depending on a journal or author’s style, a full and direct reference to the place of valid publication can be effected by citation of the abbreviated title of the publication and the standardized author citation (see Art. 46 Note 1), with other particulars as required by Art. 41.5. It can also be effected by providing a standard reference with a page or plate number to a bibliography at the end of the publication where a full bibliographic entry may be found.”

“*Ex. 13bis*. The new combination *Harperocallis neblinae* (Steyerm. ex L. M. Campb.) L. M. Campb. & Dorr (in *PhytoKeys* 21: 46. 2013) was validly published with citation of “*Isidrogalvia neblinae* Steyerm. ex L. M. Campb., *Harvard Pap. Bot.* 15 (1): 52, fig. 1. 2010”, a full and direct reference to the author and place of valid publication of the cited basionym with the journal title abbreviated according to *BPH-2* and the author citation standardized according to *IPNI* (see Art. 46 Note 1) but with spaces placed between the author’s initials and the standard abbreviation of the surname.”

“*Ex. 13ter*. The new combination *Criscianthus zambiensis* (R. M. King & H. Rob.) Grossi & J. N. Nakaj. (in *Phytotaxa* 141: 34. 2013) was validly published with citation of “*Stomatanthes zambiensis* King & Robinson (1975: 465)”, a full and direct reference to the author and place of valid publication of the cited basionym published on page 465 in “King, R. M. & Robinson, H. (1975) New species of *Stomatanthes* from Africa (Eupatorieae, Compositae). *Kew Bulletin* 30: 463–465”, the place of valid publication being cited in full in the References section of the article of Grossi & al. (2013).”

**(026) Amend Rec. 41A as follows (new text in bold, deleted text in strikethrough):**

“*41A.1*. The full and direct reference to the author and place of valid publication of the basionym or replaced synonym should immediately follow a proposed new combination, name at new rank, or replacement name. It should not be **placed distantly** or provided by mere cross-reference ~~to a bibliography at the end of the publication~~ or to other parts of the same publication, e.g. by use of the abbreviations “loc. cit.” or “op. cit.””

**(027) Add a new Recommendation 41B as follows (its beginning to be amended if Proposal 025 fails):**

“*41B.1*. In references formed in accordance with Art. 41 Note Ibis (first sentence), the titles of books in bibliographic citations should be abbreviated in conformity with *Taxonomic literature*, ed. 2, by Stafleu & Cowan (in *Regnum Veg.* 94, 98, 105, 110, 112, 115, 116. 1976–1988; with Supplements 1–6 by Stafleu & Mennega in *Regnum Veg.* 125, 130, 132, 134, 135, 137. 1992–2000, and 7–8 by Dorr & Nicolson in *Regnum Veg.* 149, 150. 2008–2009), or by analogy, but with capital initial letters. For journal titles, the abbreviations should follow *BPH-2* by Bridson & al. (2004) or its updated version online ([fmhibd.library.cmu.edu/fmi/iwp/cgi?-db=BPH\\_Online&-loadframes](http://fmhibd.library.cmu.edu/fmi/iwp/cgi?-db=BPH_Online&-loadframes)).”