

PROPOSALS TO AMEND THE CODE

Edited by John McNeill & Nicholas Turland

(089–179) Orthography and its standardization - II

Paul van Rijkevorsel

Dipteryx, Postbus 4047, NL-3502 HA Utrecht, The Netherlands. dipteryx@freeler.nl

The several sets of proposals submitted here have the same general aim as the set 005–055, namely to improve the accessibility of the Section on Orthography. However, the proposals in these sets are a little more substantial: the general scope remains editorial, but sensu latissimo. Another difference is that these proposals, although keeping the general character of a collection of building blocks rather than a fixed whole, are interdependent to a much higher degree than the earlier proposals (005–055), which on the whole can each be implemented individually. Any change in the way policy is stated will almost inevitably have some effect on policy itself, but every effort was made to keep such effects to a minimum. As before, a composite of the possible effects of these proposals can be found online at <http://botgard.bio.uu.nl/taxonomy/ortho.htm>, with a backup at <http://www.nehosoc.nl/orthography.htm>.

Orthographical variants, and other matters concerning Art. 61:

In composing the earlier set of proposals (005–055) it became clear that “orthographical variant” in the *Code* is used in two separate senses. In Art. 61.4 (also Art. 60.12 and the Index to App. II–IV) it is used in the sense most often encountered in general as well as in nomenclature (see “TL-2”, *Taxonomic literature*, ed. 2 and the printed and bound version of the ING, *Index nominum genericorum*), namely as “a deviating spelling”. However, in the rest of Art. 61 it is used in the sense of “any spelling”. This logical flaw can be resolved by adjusting Art. 61.4 to the rest of the article (proposal 007), but that is a minimum fix. The alternative is this set of proposals. Historically it can be seen that for a very long time the term was merely “variant”: the status of such a “variant” was a little vague, but among themselves these were equals. The *Sydney Code* (1983) saw a major change, substituting “orthographical variant” (written “orthographic” in that *Code* and the *Berlin Code* of 1988). These definitely are not equals. A single orthographical variant is to be treated as validly published while the others are to be corrected to the one that is treated as validly published. The *Code* deals with three categories here:

(1) all-inclusive: any spelling, “orthographical variant” sensu Art. 61.2.

(2) the accepted spelling: the “form treated as validly published”, that which was once called “the correct orthography”.

(3) the rest: any non-accepted spelling, “orthographical variant” sensu Art. 61.4 and in this set of proposals.

This set of proposals also addresses some other technical matters concerning Art. 61.

(089) In Art. 61 and Rec. 50F replace “form” by “spelling”:

There is a slight contradiction between Art. 61 and Art. 60 in how to refer to the composition of a name or epithet. Art. 60 uses “spelling” (in “original spelling”), whereas Art. 61 uses “form”. The latter may be the more accurate, as it includes hyphens, apostrophes, etc., which may or may not be taken to be included in “spelling”. Nevertheless, these two refer to the same thing and it would be preferable to use only a single term. Clearly “spelling” is the more appealing of the two, whereas “form” has the disadvantage of being used in the Section on Orthography in other meanings as well, both as a noun and as a verb; also note that Art. 14.11 also uses “spelling”. This replacing of “form” by “spelling” should also apply to Rec. 50F (and proposals 048–050).

(090) Add a footnote to “spelling” (wherever it first appears in the Section on Orthography):

“For the purposes of this *Code* “spelling” includes all elements, as discussed in the Section on Orthography, that may be part of a name or epithet without affecting valid publication: it includes not only letters but also hyphens, apostrophes, etc.”

Dictionaries, in defining “spelling”, focus on letters while neglecting other elements, so it may be a good idea to be explicit as to what “spelling” means for the purposes of the *Code*. For instance *Cymbidium i'ansonii* is the “original spelling”, with *C. iansonii* the “correct spelling” (Art. 60 Ex. 19). This could also be a paragraph, but a footnote would be in keeping with “protologue” in Art. 8, also “final epithet” in Art. 11. Note that

Rec. 60C.3 and Rec. 60E do indeed use “spelling” from a different perspective, but this does not appear to conflict with the definition given here.

(091) In Art. 61.1 replace “treated as validly published” by “correct”:

There appears to be a contradiction within Art. 61, asking to be addressed. The “treated as validly published” for the accepted spelling means that all other spellings are “treated as not validly published”. On the other hand, Art. 61.4 prescribes a treatment for these other forms/spellings (“are to be corrected”) which strongly suggests that the contrast is “correct” versus “not correct” rather than “valid” versus “not valid”. A name is validly published only once and its exact spelling does not affect validity (cf. Art. 45.2). For an example see Art. 45 Ex. 3 or, as a second example, *Hieronyma* which was validly published in 1848, whereas the “correct spelling” first saw print in 1852–1853 (Radcliffe-Smith in *Taxon* 43: 485–486. 1994).

(092) Move “only one nomenclatural type being involved” from Art. 61.2 to 61.1:

The type is an important element and deserves to be mentioned immediately in the first paragraph.

(093) Rephrase Art. 61.1:

“61.1. Any one name or epithet in a name, only one nomenclatural type being involved, has only one correct spelling¹ (see Art. 60.1 and 61.3). Any other spelling of this name or epithet is an orthographical variant.”

Compare this with Principle IV. This is the alternative to proposal 006, incorporating proposals 089–092 (and taking 094 into account). It will also be necessary to adjust the final version of Art. 60.1 (as affected by proposal 010), which refers to whatever term is defined here. The footnote reference at “spelling” is included above to emphasize that “spelling” is used here in the sense of the footnote of proposal 090. Obviously, the necessity of the reference here depends on the placement of the footnote.

(094) Throughout the Code replace “orthographical variant” by “different spelling” or “different spelling of the same name”, etc. Maintain “orthographical variant” only where it is used in the sense of “another spelling, to be corrected” (i.e., in Art. 61.4 and 60.12):

This will result in a relationship between “correct spelling” and “orthographical variant” that is somewhat comparable to the relationship between “correct name” and “synonym”. It might be possible to introduce a substitute term for the all-inclusive category of “any form/spelling of a name or epithet” but, since such a term would likely see little use, this might be overdoing things.

(095) Rephrase Art. 61.2:

“61.2. An orthographical variant may arise as the result of an orthographical error, e.g., by misapplication of compounding, inflection, etc., or as the result of a typographical error, i.e., by accident.”

This describes an orthographical variant and spells out the relationship between an orthographical variant (a written form) and an orthographical error (an act). Committing an orthographical or typographical error results in an orthographical variant. Orthographical variants are to be cited (or not, see Rec. 50F), whereas orthographical errors are to be corrected (or not, see Art. 60.3). Likely this had best remain a rule (a paragraph in Art. 61), although by content it might become a note.

(096) In Art. 61.3 replace “Art. 60” with “Art. 20, 23 and 60”:

The recommendations of Art. 20 and 23 also include relevant considerations. Note that proposal 042 aims to bring the items in question together into a single, new recommendation.

(097) Rephrase the beginning of Art. 61.3:

“If there is more than one original spelling (i.e. more than one spelling appears in the protologue [/original publication]), the one ...”

This rewording aims to deal with the fact that “original publication” is not defined, even though it is unlikely to be misunderstood. By contrast, “original spelling” is defined, and since this is exactly what is meant here, it is advantageous to put the term to use here. Another term that is defined is “protologue” (see Art. 8): this too may be useful here. This would also help in the theoretical, problematic case where different spellings occur in different parts of a protologue spread over several publications (see Art. 45.1). This applies also to Rec. 50F (proposals 048–050). Also replace “one of the variants” with “one spelling” in “... adopts one of the variants and rejects the other(s) ...”.

(098) Move Art. 61.3 to Art. 60:

Upon closer reflection, Art. 61.3 appears out of place in Art. 61, which on the whole focuses on technical definitions, whereas Art. 61.3 deals with a substantial matter requiring judgment. Actually, Art. 61.3 is quite close in spirit to Art. 60.1, addressing the focal point of that paragraph. Moving Art. 61.3 will work out best if proposals 015, 018 and 020 are passed, resulting in a slimmed-down article (comprising Art. 60.1–3 and 60.7) dealing only with “original spelling”. Moving Art. 61.3 will strengthen the unity of the ‘new’ article. An attractive sequence would be Art. 60.2, 60.1, 61.3, 60.7 and 60.3: a first paragraph defining original spelling, a second paragraph on the status of this original spelling and a third paragraph on dealing with more than one original

spelling. If this proposal is passed, then proposal 011 will be superfluous.

(099) Rephrase Art. 61.4:

“61.4. The use of an orthographical variant is an error to be corrected. For nomenclatural purposes an orthographical variant, whenever it appears in print, is to be treated as if it were the correct spelling of the name or epithet (see Art. 45.2).”

This aims to improve clarity. In the second sentence, “for nomenclatural purposes” is added to make clear that the treatment of orthographical variants “as if correctly spelled” applies to priority, homonymy, etc. Actually, if Art. 61.4 is worded so, then Art. 45.2 could become a note referring to Art. 61.4 (originally it was a note, becoming a rule only in 1978; such a note might be moved to Art. 32, where it fits well). The proposal will leave “in print” (rather than “in a publication”), which looks odd considering Art. 30, but this should give no problems.

ADDITIONAL PROPOSALS

There now follows a set of miscellaneous proposals intended to supplement proposals 005–055, dealing with strictly editorial matters.

(100) Throughout the Code replace “forming” with “coining” (and “naming” with “coining a name”) where “forming a name or epithet” (or “naming”) is used in the sense of “deciding to publish a newly formed name or epithet”:

This applies to the first sentences of Rec. 20A and 23A.3, Rec. 54A and 60C.3 and whichever of proposals 023, 037 and 043 are passed. The phrase “forming” is to be maintained where the process or method of constructing is referred to, as in Rec. 20A(j), Art. 21.3, Rec. 23A.3(d) and 60C.1(a–d). The word “coining” better expresses the uniqueness of the act of putting into print a newly formed name or epithet and eliminates the need to add “new” as in Rec. 60C.3: “In forming new epithets ...”. It also reduces the number of different meanings of the terms “forming” and “form” as used in the *Code*.

Surely the advice in Rec. 54A.1 should apply not only to “new botanical taxa” but also to nomina nova for taxa previously named. A good beginning would be: “Authors coining a name for a botanical taxon ...”.

(101) In Art. 60.2 replace “in this Article” with “for the purposes of this Code”:

The words “original spelling” are not just of importance within the framework of Art. 60, but also in other matters of orthography (e.g., *Compère* in *Taxon* 52: 339, 2003, proposal 1382). Within the *Code*, the words “orig-

inal spelling” also appear in Art. 45.2. There does not appear to be any use of “original spelling”, either in any part of the *Code* or in nomenclatural literature in general, that is different from that defined in Art. 60.2.

(102) In Art. 60.2 insert “, i.e. the spelling found in the protologue” after “validly published”:

Compare this with proposal 097.

(103) Add (in parentheses) the year of publication to the scientific names in Rec. 20A Ex. 1, Art. 60 Ex. 16 (*Eugenia costaricensis*) and Rec. 60D Ex. 1:

The Editorial Committee might also check the authorship for *Hordelymus* (see, e.g., NCU-3, *Regnum Veg.* 129: 539, 1993) and correct it if necessary in Rec. 20A Ex. 1 (and elsewhere).

(104) Add “*Parenglerula* Höhn. (1910)” to Rec. 60B Ex. 1:

This supplements proposal 025. *Parenglerula* is listed in NCU-3 (*Regnum Veg.* 129: 822, 1993) and makes for a good example of a prefix. In addition, this would add a non-Spermatophyte example to the *Code*.

(105) In Rec. 60C.1(a) reintroduce “*balansae* for *Balansa* (m)”:

This very well-known example of the case in point had been in the *Code* for a long time before it was dropped in the rewrite for the *Leningrad Code* (1978). If proposal 029 is passed it could be reintroduced painlessly.

(106) In Rec. 60C.1(c–d) reduce the examples to epithets only and, if this is felt to be desirable, add a note somewhere in the Section on Orthography:

“In the Section on Orthography any specific or infra-specific epithet that is adjectival in form is given in masculine inflection for convenience, when it serves as an example. When used in a name it will take the inflection appropriate to the gender of the generic name (Art. 23.5).”

There appears to be an inconsistency of style in the examples of Rec. 60.1(c–d), which are of actual names, as compared to the rest of Rec. 60C, which presents epithets only, strictly prescriptive, setting the norm. If the full names of (c–d) are moved into formal examples (see proposal 029) it would be desirable to cite them fully, with author and year of publication, as in the rest of the *Code*. Adding these data will cause clutter but also raises the problem that the correct spellings are not the original spellings (in at least two cases). Adjusting Rec. 60.1(c–d) to the overall style of the recommendation, giving prescribed epithets only, seems preferable.

Alternatively, the “*balansa-nus* (m), *balansa-na* (f), *balana-num* (n)” could be replaced by *Peperomia balansa-na*, to keep in the style of the clause. The note may not be necessary since Rec. 60C.4(b) and 60G.1(b) have so far managed without such explanation.

(107) Throughout Rec. 60C, and in Art. 60 Ex. 10, 11 and 19, rearrange all names and epithets in alphabetical order, by name of the person commemorated:

This will replace the current, apparently arbitrary order with a uniform, logical one.

(108) Throughout Rec. 60B and 60C standardize the preposition before the name of a person commemorated:

In Rec. 60B it is “after Sloane”, in Rec. 60C.1 “for Scopoli”, in Rec. 60C.2 “from Wislizenus” and in Rec. 60C.4 “after Macfadyen”. This is the result of historical, piecemeal inclusion of contributions by various proposers. Which of these prepositions is to be preferred (“after”, “for”, “from” or, perhaps, “based on”) appears to be mostly a matter of taste. Nevertheless, a factor here is that “form” is used extensively in parts of the Section on Orthography, both as a noun and as a verb. Obviously “form” and “from” are very similar in appearance and may upon hasty reading be confused, which suggests that for clarity’s sake “from” is to be avoided.

(109) Add to Rec. 60D:

“A genitive is to be particularly avoided for a geographical feature named after a person (or with a name similar to that of a person), where an adjective with an ending *-ensis* is preferable.”

This offers a middle ground between either deleting or endorsing ‘geographical genitives’ as in proposal 045. Often a geographical genitive is uncontroversial; confusion is only likely in cases like *Begonia augustae* (“of the Augusta River”), *Gomphrena mariae* (“near the [?]village of Maria”), *Eremophila margarethae* (“near Mount Margaret”), *Agrostis michaelis* (“of the Isle of St. Michael”) and *Verbascum petrae* (“near the Ruins of Petra”). The proposal to include Rec. 60D in the *Code* (by Boivin in *Canad. Field-Naturalist* 63(2): 77. 1949) gave no real reason except to state that it represented current practice (“more in accordance with Latin usage” and “most frequently used by botanists”). It was recommended and accepted without further comment. Obviously, geographical genitives do exist and are even recommended in the *Code* (*saharae* in Rec. 23A.1, *sancti-johannis* and *sanctae-helenae* in Rec. 60C.4(d)), so it would not hurt to allow them marginal recognition.

(110) Add an example to the amended Rec. 60D of proposal 109:

“*Ex. n.* Epithets allowing no confusion whether they

commemorate a person or a geographical feature: *Arctostaphylos gabrielensis* P. V. Wells (1992) named after the San Gabriel Mountains (California) and *Echinocactus victoriensis* Rose (1909) named after Victoria (Mexico).”

These are in happy contrast to *Embelia ottoniana* Sleumer (1987), which to all appearances honours Eduard Otto (1812–1885) but is actually named after Mount Otto (Papua New Guinea). A third (but less well-known) example might be *Pityrodia augustensis* Munir (1979) named after Mount Augustus (Australia).

HYBRIDS

It would appear that Rec. H.3A (introduced in the *Sydney Code*, 1983) is neither understood nor followed by the world at large: it is rare to find it applied in print beyond the *Code* (from 1988 onward) and *Taxon* (publications by Timber Press being a happy exception). It is not followed even in the *International Code of Nomenclature for Cultivated Plants* (1995, particularly clear in the “List of IRAs”), D. J. Mabberley, *The Plant-Book* (1987, 1997, 2002) or in W. T. Stearn, *Stearn’s dictionary of plant names for gardeners* (1972, 1997). For the controversy raised see also Leslie in *Hortax News* 1(1): 11. 1993, available online at <http://www.hortax.org.uk/hortaxnews/text1.html#sect6>. Likely there is no other provision in the *Code* that is ignored so widely. It seems prudent to adjust the *Code* so as to allow users to follow it. It will be hard enough to eradicate the upper case letter “X”, not to mention italicization of the letter.

(111) Rephrase Rec. H.3A:

H.3A.1. The multiplication sign (“×”), indicating the hybrid nature of a taxon, should be placed so as to express that it belongs with the name or epithet but is not actually part of it. The exact amount of space, if any, between the multiplication sign and the initial letter of the name or epithet should depend on what best serves readability.

H.3A.2. If the multiplication sign is not available it should be approximated by a lower case letter “x” (not italicized).”

This is a clean rewrite. First, it is rephrased for uniformity with Art. H.3.1 to which it refers. Second, this puts the matter where it belongs, with the typographer. Placing the multiplication sign exactly must be done by eye, since the amount of space desirable will depend upon the font. These days the relevant process, referred to as kerning (or character spacing), is available in any word processor. This allows inserting half a letter space, or any amount imaginable. Third, this puts names and epithets on an equal footing. Fourth, this emphasizes that

a letter “x” is not a full equivalent of a multiplication sign “×” but a stop-gap measure at best.

Rec. 60C.2: I - a rewrite of the first sentence

As ruled by Art. 60.11, an epithet based on a personal name must have a termination conforming to Rec. 60C.1, unless it belongs to the category indicated in Rec. 60C.2. Therefore, Rec. 60C.2 is of considerable practical importance, but its accessibility appears to be much less than would be desirable.

Since the time Nicolson wrote the proposals leading to Rec. 60C as it now is (in *Taxon* 23: 549–561. 1974), there has been a major development in that indexes have become searchable databases and have been made available online, especially the *International Plant Names Index* (IPNI) at <http://www.ipni.org>. Although coverage by IPNI is by no means complete, it allows traditional usage to be established much more precisely. This greater precision and clarity should go into the *Code* because it concerns (1) exceptions (to Rec. 60C.1), and surely exceptions are best delimited as closely as possible, and (2) traditional Latin forms, governed by Latin grammar, which makes explicitness desirable, especially in view of the general feeling on contemporary familiarity with Latin.

The rewrite proposed here is quite substantial and contains some ‘new’ elements. First, it aims to produce a genuine recommendation that actually recommends certain preferred forms. Second, it introduces a concept that (so far) is not explicitly mentioned in the *Code*, namely “given name”. Obviously the given name has been a familiar part of botanical nomenclature, and thus of tradition, since before a *Code* existed. It is proposed to recognize “given name” in this traditional sense only.

A miscellaneous point that may be worth making is that the provisions of the *Code* are retroactive (see Principle VI), unless specified otherwise. This means that tradition, as recognized in the current *Code*, is to be applied retroactively. Or, looking at the other side of the coin, it means that botanical usage (coming into being over the past 250 years), as it can be observed today, can be taken as evidence for what authors in the past have trusted would be in the current (to those authors “future”) *Code*, where it concerns “tradition”.

These proposals aim to clarify existing policy, with an emphasis on supplying examples. Orthography is a topic that lends itself extremely well to definition by example.

(I12) Expand the first sentence of Rec. 60C.2 into an independent recommendation, to be placed immediately before or after Rec. 60C. This recommendation to have several paragraphs:

When surveying epithets of the kind indicated in Rec. 60C.2 it quickly becomes apparent there are two

main categories: (1) after well-known naturalists, genitives and adjectives, and (2) after given names, genitives (only). An epithet in the first category is connected to a person, not to a personal name. Take *brunonis* (adjective *brunonianus*) based on Bruno referring to the famous Robert Brown: other persons named Robert Brown are commemorated by *brownii* (adjective *brownianus*), as may Robert Brown himself. Other persons named Bruno should be commemorated by *brunoi* (adjective *brunoanus*). An epithet in the second category is connected to a group of personal names. All persons whose given name corresponds with, or is derived from, a certain latinized form may be commemorated by the same epithet: anybody with a given name Michael, Michel, Miguel, Mikhail, etc., may be commemorated by *michaelis*. This proposal is one of the options of proposals 030 and 031 and is the alternative to proposal 046 which suggests integrating the first sentence of Rec. 60C.2 into Rec. 23A.1.

(I13) The first paragraph in the recommendation of proposal I12 to have this form:

“Authors coining a specific or infraspecific epithet honouring one or more persons may adopt as the epithet the Latin genitive, appropriate to the sex and number of the person(s) honoured, or the Latin adjective of a latinized form¹ of a personal name.”

This first paragraph applies to all epithets based on a latinized form of a personal name, irrespective of whether it is recommended. The “appropriate to the sex and number of the person(s) honoured” could be moved to a separate sentence if this were thought to improve readability. For the “latinized form¹” see proposal 120.

(I14) The second (or third) paragraph in the recommendation of proposal I12 to have this form:

“Authors coining an epithet honouring one or more well-known botanists or naturalists who are traditionally commemorated by an epithet that is the Latin genitive or Latin adjective of a well-established latinized form should conform to tradition.”

Stated more briefly: “when dealing with tradition, follow tradition”. This is new to the *Code* in that it shifts emphasis from an approach of looking case-by-case at individual epithets to an approach of looking collectively at the epithets dedicated to a single person. This applies only to a special kind of person, who needs to be of sufficient stature to have made an impression on nomenclature. Whether a person qualifies is determined by tradition.

(I15) Add an example to the paragraph of proposal I14 (or to Rec. 60C.2):

“*Ex. n.* Epithets commemorating a well-known botanist or naturalist, a Latin genitive singular in second

declension: *afzelii* based on Afzelius; *allemanii* based on Allemanius (Freire Allemão); *clusii* based on Clusius; *linnaei* based on Linnaeus; *martii* based on Martius; *rumphii* based on Rumphius; *solandri* based on Solander (Solander); *wislizeni* based on Wislizenus. In third declension: *bellonis* based on Bello; *brunonis* based on Bruno (Robert Brown); *chamissonis* based on Chamisso. Latin adjectives: *afzelianus*, *clusianus*, *linnaeanus*, *martianus*, *rumphianus* and *brunonianus*, *chamissonianus*.”

This incorporates parts of the existing Rec. 60C.2 and of proposal 033; it is intended to emphasize that the paragraph of proposal 114 concerns persons who have made their mark on nomenclature. This is hardly a definitive listing, other cases can be found in Art. 60 Ex. 10.

(116) Add an example to the paragraph of proposal 090 (or to Rec. 60C.2):

“*Ex. n.* Epithets commemorating a well-known botanist or naturalist, who has a surname similar to a given name with a well-established latinized form or who is known *ex officio* by such a given name, a Latin genitive singular in second declension: *alberti* based on Albertus (Prince Albert, patron of the sciences); *alexandri* based on Alexander (R. C. Alexander (Prior)); *gregorii* based on Gregorius (J. W. Gregory or A. C. Gregory); *hieronymi* based on Hieronymus. In third declension: *hugonis* based on Hugo (Father Hugh Scallan); *ottonis* based on Otto (Eduard Otto or his father Friedrich). Latin adjectives: *albertianus*, *gregorianus* and *hugonianus*, *ottonianus*.”

This illustrates a sub-category of the group indicated in proposal 114. It is worth distinguishing these in a separate example for three reasons: (1) there is a fair number of these; (2) it helps to make clear that, although no adjective is to be based on the latinized form of a given name, adjectives can be based on personal names in this sub-category; and (3) to have any basis for maintaining the epithet *gregorii* (instead of correcting it to *gregoryi*). If *gregorii* does not belong in a special category, it is impossible to justify why *fortuni* is to be corrected to *fortunei* and *loureiri* (or *loueirii*) to *loueiroi*, whereas, on the other hand, *gregorii*, with a similar difference of a single vowel, is not to be corrected to *gregoryi*.

If the general feeling is that surnames like Alexander and Gregory should always be treated under Rec. 60C.1 (leading to *alexanderi*, *gregoryi* and *gregoryanus*), then these epithets can be dropped from this example and a note added that treating surnames as given names is only allowed if the resulting epithet differs by more than a single vowel (cf. proposal 134).

(117) Add a note to the paragraph of proposal 114:

“*Note n.* An epithet as indicated here is connected to a person deserving of the honour, not to a particular per-

sonal name.”

This (1) emphasizes that the status under the paragraph of proposal 114 is linked to a person, not to a particular personal name, and (2) serves as a placeholder for the following example.

(118) Add an example to the note of proposal 117:

“*Ex. n.* Epithets based on a modern personal name with the same spelling as the latinized form by which a well-known naturalist is commemorated, genitives: *Licania belloi* Prance (1995) after Erick Bello; *Vriesea belloi* Leme (1989) after Renato Bello; *Eugenia bruno* Mattos (1990) after Bruno Irgang. An adjective: *Digitaria brunoana* Raimondo (1989 [“1988”]) after Francisco Bruno.”

(119) Give the text of proposal 034 the status of a note to the paragraph of proposal 114, to be placed after the example of proposal 118:

“*Note n.* A modern surname, even when originally derived from Latin, should be treated in accordance with Rec. 60C.1: an epithet based on Camus (Edmond Camus or Aimée Camus) should be *camusii* (not “*cami*”). A 21st century botanist with a surname Linnaeus should be commemorated by *linnaeusii* and *linnaeusianus*; similarly Magnus, *magnusii* and *magnusianus*, etc.”

(120) Add a footnote to “a latinized form” at its first appearance, likely in the paragraph of proposal 113:

“¹For the purposes of Art. 60 and its recommendations, “a latinized form” is defined as any form (of a personal name) that traditionally is treated as being Latin: it includes a Latin personal name, a latinized form of a personal name and a personal name treated as being Latin.”

This also could be a recommendation or a note, but should be most effective as a footnote. Defining “a latinized form” this way abandons the traditional formula “name already in Greek or Latin or possessing a latinized form” which, upon closer reflection, is not as exact as is desirable. Botanical usage treats very many feminine given names as having latinized forms, belonging in Rec. 60C.2, although the casual observer will not immediately recognize such names (e.g., Edith) as possessing a latinized form. When dealing with a personal name of Greek origin (e.g. Alexandros), the *Code* does not allow a Greek genitive (*alexandroio*), but uses the Latin genitive (*alexandri*) of the latinized form (Alexander) of a Greek name. A name like Otto is not Latin and has no separate latinized form, but is treated as a third declension Latin noun (e.g. in the case of Eduard Otto).

(121) The third (or second) paragraph in the recommendation of proposal 112 to have this form:

“Authors coining a specific or infraspecific epithet commemorating one or more persons by a given name that either corresponds with, or is taken to be derived from, a well-established latinized form should adopt as the epithet the appropriate Latin genitive of this latinized form.”

The provisions of proposals 113–119 form a unit, as do those of proposals 121–128. It is not clear if there is any real advantage in having one of these units follow the other in the *Code*: either first the unit of 113–119 with the prominent naturalists (of exceptional application), or first the unit of 121–128 with the given names (more humble but of wider application).

(122) Add an example to the paragraph of proposal 097 (or to Rec. 60C.2):

“*Ex. n.* Authors desiring to commemorate Frans Stafleu by his given name (Frans) should adopt the Latin genitive of the latinized form (Franciscus) as epithet: *francisci*.”

(123) Add an example to the paragraph of proposal 097 (or to Rec. 60C.2):

“*Ex. n.* Epithets commemorating a person by given name, a Latin genitive singular of a well-established latinized form, in first declension: *annae* based on Anna (An(n)a, Anne(ke), Annika, etc.); *edithae* based on Editha (Edith); *elisabethae* based on Elisabetha (Bess, Betty, Elisabeth, Elizabeth, Lisa, Liz(zie), etc.); *murielae* based on Muriela (Muriel). In second declension: *augusti* based on Augustus (August(e)in, Augustus, G(u)s(t), etc.); *caroli* based on Carolus (Carl(os), Charles, Karel, etc.); *henrici* based on Henricus (Enrique, Hal, Harry, Heinrich, Hendrik, Henk, Henri, etc.), *hieronymi* based on Hieronymus (Jeroen, Jerome, Jeronimo, etc.); *iacobi* based on Jacobus (Jaap, Jacob, Jake, James, Jim, etc.); *maximilliani* based on Maximillianus (Max(imillian)); *nicolai* based on Nicolaus (Colin, Klaas, Klaus, Nick, Nic(h)o(las), Nico(laas), etc.), *stephani* based on Stephanus (Esteban, István, Stef(an), Stephen, Steve(n), etc.). In third declension: *beatricis* based on Beatrix (Béatrice, Beatrix); *conceptionis* based on Conceptio (Concepción); *gabrielis* based on Gabriël (Gabe, Gabriel, etc.), *hugonis* based on Hugo (Hugh, Hugo, etc.); *joannis* or *johannis* based on Johannes (Hans, Jack, Jan, João, Johan(n(es)), John, etc.); *michaelis* based on Michaël (Mich(a)el, Miguel, Mike, Mikhail, etc.); *vic-toris* based on Victor (Vic(tor)).”

This incorporates parts of the existing Rec. 60C.2 and of proposal 032, and is expanded with extra cases, arranged by declension. These are the given names with a strong and unambiguous tradition of being treated as Latin. Noteworthy is that there is some difference between masculine given names and feminine given names. Tradition recognizes only a limited number of masculine given names that are “traditionally treated as

Latin”, while adopting greater latitude regarding feminine given names; see Stearn (in Taxon 47: 496. 1998). In proposal 056 (Stapleton in Taxon 52: 635. 2003), it is argued that Stearn carried this too far and that Muriel should be removed from this example. As examples go, Muriel is indeed a rather poor one, with few epithets in existence. It is included here since these proposals assume “no change in policy”. This example can easily be modified to follow the policy set by the Nomenclature Section in Vienna. Obviously this listing is an indication only, far from complete.

(124) Add an example to the paragraph of proposal 121 (or to Rec. 60C.2):

“*Ex. n.* Epithets commemorating two or more persons by given name, a Latin genitive plural of a well-established latinized form, in first declension: *Achryanthes margaretarum* P. J. de Lange (2001) after Margaret “Honey” McCoy and Margaret “Marg” Christian; in second declension: *Weinmannia henricorum* Bernardi (1964) after Henri Baillon, Henri Humbert, Henri Lecomte and Henri Perrier de la Bâthie; in third declension *Macaranga johannium* Whitmore (1980) after John S. Womersley and L. John Brass.”

Actually this is a very small category. Another example is *Spathoglottis augustorum* Rchb. f. (1886) after Auguste Linden and Auguste de Rhonne. A final option might be *Dorstenia albertorum* Carauta & al. (1974, “alberti”) after Alberto Castellanos and Albertus Magnus but this may be contested (see also Alberto 1(1): 2-4. 1986). It may be worth pointing out that there is no close agreement in botanical usage about Margaret. This name is derived from the Greek, μαργαριτης (margarites, pearl), and has a classical Latin form in margarita, so it would be logical to expect this to have a single, well-established latinized form. The most used spelling for a ‘personal epithet’ (any form of Margaret) should be *margaritae*, but *margaretae*, *margarethae* and “margaretta” have also been published. Note also the epithets *margarita* (pearl, descriptive) and *margaritae* (after Santa Margarita Island, geographic).

(125) Add a note to the paragraph of proposal 121 (or to Rec. 60C.2):

“*Note n.* A given name should be treated in accordance with Rec. 60C.1 if it does not correspond with, or is not taken to be derived from, a well-established latinized form. This can be determined by consulting this recommendation or botanical usage.”

This points out the obvious, serving as a placeholder for the following examples.

(126) Add an example to the note of proposal 125:

“*Ex. n.* Although obviously not of Latin origin, the given name Otto is accepted as a name traditionally treat-

ed as being Latin: e.g., *Anthurium ottonis* K. Krause (1932), *Microstylis ottonis* Schltr. (1922), *Psychotrya ottonis* Standl. (1931) and *Stelis ottonis* Schltr. (1929) are all dedicated to Otto Buchtien.”

(127) Add an example to the note of proposal 125:

“*Ex. n.* In botanical usage, Gordon is not accepted as a name traditionally treated as being Latin: e.g., *Dutaillopsis gordonii* T. G. Hartley (1997), *Elaeocarpus gordonii* Tirel (1983), *Engomegoma gordonii* Breteler (1996) and *Tessmanianthus gordonii* Almeda (1989) are all dedicated to Gordon McPherson.”

(128) Add a note to the paragraph of proposal 121 (or to Rec. 60C.2):

“*Note n.* A Latin adjective of a latinized form of a given name has no place in botanical tradition. An adjective based on a given name can be formed in accordance with Rec. 60C.1.”

Just to be safe, this note emphasizes what is recommended in proposal 121. Botanical usage is clear on adjectives of given names. Of traditional latin(ized) given names (Franciscus, Hieronymus, Johannus, etc.), no epithet in adjectival form is listed in IPNI as ever having been published; of modern given names only a few adjectives could be found, and these all have been augmented. Accepting this aspect appears to have very limited consequences for existing names: if this ever became a “back-door rule”, names honouring the son of the horticulturist Linden would become correctable to *Aërides augusteanum* and *Alocasia augusteana*.

(129) Reword Rec. 60C.3 to become the first paragraph of Rec. 60C:

“*60C.1.* Authors coining a specific or infraspecific epithet based on a modern personal name (i.e. a name to which the tradition of being treated as Latin does not apply, see [recommendation of proposal 112 / Rec. 60C.2]), honouring one or more persons, should use a termination and form as indicated in this recommendation, but otherwise should follow the customary spelling of that personal name, provided this meets with Art. 60.4–6.”

This is the alternative to proposal 028, and actually has same contents but is reworded to match the proposed first paragraph (proposal 113) of the recommendation of proposal 112.

Rec. 60C.2: II - balancing Rec. 60C.2 against 60C.1

The above set of proposals (112-128) offers options for a clean rewrite of Rec. 60C.2. The result could be used without problems in application, among like-minded people. However, since Rec. 60C.1 is a ‘back-door

rule’ (as far as terminations are concerned) and Rec. 60C.2 enjoys the status of an escape hatch in the ‘back door’ of Rec. 60C.1 (see, e.g., Demoulin in Englera 20: 214–215. 2000), the relationship between Rec. 60C.1 and 60C.2 is not altogether an easy one. For example, assuming that michaelis is the accepted genitive of Michaël, then a name like *Spirotheca “michaeli”* appears to be in limbo. If this had been formed under Rec. 60C.1 it would have been *Spirotheca “miguelii”*, as it commemorates Fray Miguel de Ipiales. Since it meets neither Rec. 60C.1 nor 60C.2, surely Art. 60.11 requires it to be corrected. The exact path of legal reasoning to effect this is less than crystal clear. Furthermore, the present structure is less explicit than might be desirable as concerns the possibility of two epithets (of the same grammatical form) based on one personal name. An epithet covered by Rec. 60C.2 is exempt from correction under Art. 60.11, but little is said about an epithet based on the same name but formed in accordance with Rec. 60C.1. For example, *Fuirena stephani* commemorates Esteban Martínez on the classic assumption that Stephanus is a well-established latinized form of Stephen, Steven, etc. On the other hand, *Fabiana stephanii* commemorates Stephan Berk, formed in accordance with Rec. 60C.1. The following set of proposals attempts to fine-tune the relationship between Rec. 60C.1 and 60C.2.

(130) Add a first paragraph to the article of proposal 020 (or to Art. 60, to be placed before Art. 60.11):

“A specific or infraspecific epithet honouring one or more persons and based on a personal name is to have a termination in accordance with Rec. 60C.1 unless it is accepted as having a Latin ending (see [recommendation of proposal 112 / Rec. 60C.2]).”

This paragraph is intended (1) to delimit “personal epithets” more explicitly to those falling under the two recommendations, and (2) to determine the relationship between these two recommendations. The exact wording is critical: are Rec. 60C.1 and 60C.2 to be equals or is one of them to be ‘in the driving seat’? Another matter is how much should be included in this paragraph: it would be possible here to unite elements common to both Rec. 60C.1 and 60C.2, namely (1) personal epithets are “either a genitive or an adjective” and (2) a genitive is to be “appropriate to the sex and number of the persons honoured”. However, this is not proposed here as it would mean a change in the legal structure. A side-effect of this proposal is that the possibility of a personal name as “a word in apposition” (cf. Art. 23.1) would be somewhat more explicitly disallowed than is now the case. If this proposal is passed then proposal 021 will be superfluous.

(131) Add a paragraph to the article of proposal 020 (or to Art. 60, to be placed after Art.

60.11):

“The use of a Latin ending contrary to [recommendation of proposal 112 / Rec. 60C.2] is treated as an error to be corrected (see also Art. 32.5).”

This is intended to be analogous to Rec. 60.11 for cases in which an incorrect or inappropriate Latin ending was published. Such cases are few, since authors publishing such epithets usually are quite particular in their use of Latin. Theoretically it is good to guard against abuse as mentioned by Christensen (in Englera 2: 95. 1982). The alternative to this “back-door rule” would be to have this paragraph itself define the incorrect and inappropriate Latin endings to be corrected. That would eliminate the need for the paragraph of proposal 113 and would leave the ‘new’ recommendation of proposals 114–128 with a cleaner profile, dealing only with recommended ‘latinized epithets’. However, at this point, this course represents more change than can easily be surveyed. See also proposal 133.

(132) Add an example to the paragraph of proposal 131:

“*Ex. n. Spirotheca “michaeli”* dedicated to Fray Miguel de Ipiales is to be cited correctly as *S. michaelis* Cuatrec. (1954), not as *S. “migueli”*. Since Cuatrecasas in 1951 published *Senecio miguelii*, honouring Miguel Bang, it is obvious he was well aware of his options and deliberately chose a classic Latin form.”

Another name that may become correctable (depending on proposal 134) is *Licania “anneae”* (spelled both *annae* and *anneae* in the protologue) after “wife Anne”.

(133) Rephrase Art. 60.11:

“60.11. The use of a termination (for example *-i*, *-ii*, *-ae*, *-iae*, *-anus*, or *-ianus*) contrary to Rec. 60C.1 is treated as an error to be corrected (see also Art. 32.5).”

This is to be used side-by-side with the paragraph of proposal 131 and is the alternative to proposal 022, which restates current policy. On the other hand, proposals 131 and 133 could be combined, resulting in a single, integrated paragraph, treating Rec. 60C.1 and 60C.2 side-by-side. The problem, however, may be to keep the examples organized.

(134) Add a paragraph to Art. 60, to be placed after Art. 60.11, or to become part of the article of proposal 020:

“In coining a specific or infraspecific epithet, latinization or de-latinization of a personal name is only acceptable if the resulting epithet is sufficiently distinct from what it otherwise would be (or if it is indicated in [recommendation of proposal 112 / Rec. 60C.2]).”

This paragraph attempts to convert into an explicit rule that which Art. 60 Ex. 11 states is regulated in Art. 60.11. Although Ex. 11 is quite clear on what is the

desired effect, the exact optimal phrasing is not immediately obvious. A given is that *bigelovii* versus *bigelowii* are acceptable as distinct epithets, whereas *fortuni* versus *fortunei* and *loueiri* or *loueirii* versus *loueiroi* are not. See proposals 135 and 136 for an exact implementation of “sufficiently distinct”.

(135) Add a note to the paragraph of proposal 134:

“*Note n.* For an epithet formed in accordance with [recommendation of proposal 112 / Rec. 60C.2] (i.e. by treating a personal name as Latin) to be distinct from an epithet formed in accordance with Rec. 60C.1 (i.e. by adding a termination to a personal name), the difference should be more than a single vowel in its final part.”

This is intended to help implement the paragraph of proposal 134. A problem here is that this disallows *solanderi* (to be corrected to *solandri*). Allowing both forms would not really hurt as there is just the one Solander. However, there are many Alexanders, and this appears to be the way to keep them in their place. See also proposal 136.

(136) Insert in the note of proposal 135, immediately after “final part”:

“(i.e., after the last consonant belonging to the personal name)”

The paragraph of proposal 134, as implemented in the note of proposal 135, is a hinge point (as is the paragraph of proposal 130), and phrasing is critical. One of the options is to let it apply only to the part of the personal name after the last consonant. This will allow *solanderi* (as in *Geranium solanderi*) to exist as distinct beside *solandri* (the preferred spelling). The downside is that anything would be allowed in the matter *alexandri* versus *alexanderi* and any name using *alexandri* or *alexanderi* is to be retained in the original spelling. This may not be too bad, as there is at least one name that otherwise would become correctable: *Catophractes alexandri* (after J. E. Alexander, apparently an isolated case of a surname, not that of R. C. Alexander Prior). Note proposals 156 and 157.

(137) Move Art. 60 Ex. 11 to a position after the paragraph of proposal 110 and rephrase the second half of the second sentence:

“... Billardierius, but the resulting epithets differ only in a single vowel from epithets formed by adding a termination to the personal name (see Rec. 60C.1) and are not acceptable.”

This rewording is intended to mirror the wording of the paragraph of proposal 134.

(138) Add an example to the paragraph of proposal 134:

“*Ex. n.* Linnaeus is commemorated by *linnaei* and

linnaeanus, not by “*linnei*” and “*linneanus*”, which are based on his de-latinized name, Carl von Linné.”

This reflects tradition. Among currently used names, there might be a subspecies of *Hieracium* with an epithet that would become correctable.

(139) Add a note to the paragraph of proposal 134:

“*Note n.* An original spelling representing an intentional latinization is to be retained unless the latinization concerns only the ending (see Art. 60.7).”

(140) Move Art. 60 Ex. 12 to a position after the note of proposal 139:

This is an example of the case in point.

(141) Add an example to the note of proposal 139:

“*Ex. n.* *Calyptanthes caroli* Britton & P. Wilson (1920) honours the co-collector of the type, following the custom that a surname (Charles) with the same form as a given name (Charles) can be latinized (Carolus) as if it actually were that given name, a custom that is not generally accepted in botanical tradition. Since the latinization involves more than the ending, the epithet is to be accepted and not altered to “*charlesii*”.”

(142) Add an example to the note of proposal 139:

“*Ex. n.* *Wollemia nobilis* W. G. Jones & al. (1995) honours the discoverer David Noble (the implicit latinization being *Nobilis*), in the correct and appropriate genitive (singular, masculine, in third declension). Although coining such epithets is not recommended, the epithet is to be accepted and not altered to “*noblei*”.”

This is either an alternative or a supplement to proposal 141, depending on how desirable it is to include examples of high-profile plant species. Moreover, including such a recent example in the *Code* may have the effect of encouraging authors to coin more such epithets.

(143) Add a note to the paragraph of proposal 134:

“*Note n.* If sufficiently distinct, an epithet formed in accordance with Rec. 60C.1 is acceptable, even if applying [recommendation of proposal 112 / Rec. 60C.2] is recommended, and vice versa.”

This is a placeholder for the examples to follow.

(144) Add an example to the note of proposal 143:

“*Ex. n.* Latinized form that is a surname in its own right: Chamisso, Hieronymus and Martius are preferably commemorated by *chamissonis* (adjective *chamissonianus*), *hieronymi* and *martii* (adjective *martianus*), but

Cibotium chamissoi Kaulf. (1824), *Sphaerococcus chamissoi* C. Agardh (1820), *Lyngbya hieronymusii* Lemmerm. (1905), *Diploptropis martiusii* Benth. (1838) and *Mimosa martiusiana* Steud. (1841) are correct. The name *Hyptis “martiusii”* is to be correctly cited as *H. martiusii* Benth. (1833), not as *H. “martii”*.”

These are examples of a phenomenon that will be well-known to the veteran nomenclaturist but may be a cause of wonderment to the more casual user of botanical names. If the phrase of proposal 136 is included in the note of proposal 135, then “Solander”, “*solandri*” and “*Geranium solanderi* Carolin (1965)” may be added here. This example makes an effort to include some non-Spermatophyte plants.

(145) Add an example to the note of proposal 143:

“*Ex. n.* Latinized form that is a latinization of a surname: Bigelow and Glaziou are preferably commemorated by *bigelovii* (adjective *bigelovianus*) and *glaziovii* (adjective *glaziovianus*) but *Carex bigelowii* Torr. ex Schwein. (1824), *Erythroxyllum glazioui* O.E. Schulz (1907) and *Vriesea glaziouana* Lem. (1867) are correct.”

This connects Art. 60 Ex. 10 and Rec. 60C.1(a). A lichen might be used instead of *Vriesea glaziouana*, but it is unclear if *Buellia glaziouana* (Kremp.) Müll. Arg. is in current use. Otherwise see proposal 144.

(146) Add an example to the note of proposal 143:

“*Ex. n.* Given name covered by [paragraph of proposal 121 / Rec. 60C.2]: a person to be commemorated by the given name Michael, Mike, Mikhail, etc. is preferably honoured by the epithet *michaelis*, but *Nepenthes mikei* B. R. Salmon & Maulder (1995) honouring Mike Hopkins is correct. Similarly a person called Hugh or Hugo is preferably honoured by an epithet *hugonis*, but *Epidendrum hughii* Rchb. f. (1882) honouring Hugh Low is correct.”

A better example might be *Scilla hughii* Tineo ex Guss., if it could be established to be based on a given name.

(147) Add a note to the paragraph of proposal 134:

“*Note n.* For the purposes of [paragraph of proposal 134], only epithets commemorating the same person are to be compared. An epithet based on a given name, formed in accordance with [paragraph of proposal 121 / Rec. 60C.2], is not to be compared to an epithet based on a surname (formed in accordance with Rec. 60C.1), even though it may differ only in a single vowel. Such epithets will refer to different persons.”

The optimal phrasing is not entirely clear. What is intended here is that surnames are to be compared to surnames and given names are to be compared to given

names (all the given names corresponding with, or derived from, a particular latinized form).

(I48) Add an example to the note of proposal I47:

“*Ex. n.* An epithet based on the latinized form Albertus (given name Albert(o), Bert, etc.) is *alberti*, whereas a (hypothetical) epithet based on the surname Albert or Alberti would be *albertii*. An epithet based on Philippus (given name Flip, Philip(pe), etc.) is *philippi*, whereas *philippii* is the correct epithet when honouring Rudolph Philippi.”

This is mostly hypothetical, since in practice there does not appear to be much overlap: epithets based on the given name Albert(o) or Augustus are common, but there appear to be no epithets based on a surname Albert or August. The reverse is true for Martin. Henrici is another potentially troublesome surname in the same category as Alberti and Philippi. For instance, if there were to be a person named Henry Henrici, an epithet based on his given name would be *henrici*, whereas one based on his surname would be *henricii*.

(I49) Add an example to the note of proposal I47:

“*Ex. n.* An epithet based on the latinized form Gregorius (given name Greg(or(y))) is *gregorii*, whereas an epithet based on the surname Gregory is *gregoryi* (adjective *gregoryanus*), except for epithets based on J. W. Gregory and A. C. Gregory, where *gregorii* (adjective *gregorianus*) is correct (see [paragraph of proposal 114 / Rec. 60C.2]).”

(I50) Add an example to the note of proposal I47:

“*Ex. n.* An epithet based on the latinized form Alexander (given name Alejandro, Alex(ander), Alexandre, Alexej, Sander, etc.) is *alexandri* (note feminine *alexandrae* based on Alexandra), whereas an epithet based on the surname Alexander is *alexanderi* (feminine form *alexanderae*), except when it concerns R. C. Alexander Prior and *alexandri* is correct (see [paragraph of proposal 114 / Rec. 60C.2]). An epithet based on the latinized form Petrus (given name Pete(r), Pieter, etc.) is *petri* (note feminine *petrae* based on Petra), whereas an epithet based on the surname Peter is *peteri* (feminine form *peterae*).”

If proposal 136 is passed, then the part about Alexander is no longer tenable and should be dropped or readjusted. If it is dropped here, then *alexandri* might be included in the example of proposal 123.

(I51) Add a note to the paragraph of proposal I34:

“*Note n.* For epithets based on the well-established latinized form of a given name, or based on a surname

identical to such a form, an ending of *-is* (a genitive in third declension) versus *-ii* (a termination added to a name) is not sufficiently distinct.”

When looking at epithets based on Gabriël there is a clear general pattern: *gabrielis* is used when based on a given name, *gabrielii* when based on a surname and *gabrielensis* when based on a geographical feature (*Cecropia gabrielis*, *Pulicaria gabrielii* and *Arctostaphylos gabrielensis*). However, *gabrielis* has been used at least once for a surname (*Aristolochia gabrielis*) and at least once for a geographical feature (*Psychotria gabrielis*). In addition, some epithets were published as *gabrielii* (likely all after a surname). Therefore, it is desirable to be explicit here that *-is* and *-ii* are not sufficiently distinct for the purposes of proposal 134.

(I52) Add an example to the note of proposal I51:

“*Ex. n.* An epithet based on a given name Michael is *michaelis* (with *michaelii* not sufficiently distinct to be acceptable as a de-latinization) while an epithet based on a surname Michael is *michaelii* (with *michaelis* not sufficiently distinct to be acceptable as a latinization); similarly for Gabriel and Victor.”

Rec. 60C.2: III - The second sentence, and other exceptional cases

The second sentence of Rec. 60C.2 deals with exceptional epithets dedicated to persons who are usually commemorated by epithets formed in accordance with Rec. 60C.1. Or, more specifically, it deals with surnames ending in “-o” or “-on” that are treated occasionally as nouns in third declension. The whole of Rec. 60C.2 focuses on genitives. The combination is unfortunate since there appear to be extremely few such ‘occasional epithets’ ending in *-onis*, i.e. genitives in third declension. There is *Muehlenbergia richardsonis* (which caused this sentence to be included, based on *Vilfa richardsonis*), a lone form in contrast to some forty basionyms using *richardsonii*. Possibly in current use is *Epidendrum jamiesonis* (based on Jameson). Apparently not in current use are *Thalictrum chiaonis* and *Potentilla loureironis*. In IPNI there is a *Podostemon johnsonis*, but this is a combination based on *Mniopsis johnsonii*. Examples are very few and hard to come by.

An in-between case is Ecklon: about one third of the epithets-in-the-genitive dedicated to him have the form *ecklonis*, which is not enough to make this the traditionally preferred form, but rather too much to make it an exception.

Another well-known name involved here is Bertero, which is not only commemorated by the genitives *berteri*, *berterii*, (the now correct) *berteroi* and the adjectives *berterianus* and (the now correct) *berteroanus*, but also by a few dozen basionyms using *berteronianus*, treating

Bertero as a noun in third declension. This makes adjectives of surnames that are ‘occasional third declension nouns’ a fact to be reckoned with.

In addition, this set includes some proposals on other epithets on which it may be wise to have a considered decision.

(153) Add an example to the note of proposal 143, to be placed after the example of proposal 146 (or to 60C.2):

“*Ex. n.* Names containing an epithet traditionally accepted as having a Latin ending (treating the surname ending in “-o” or “-on” of a well-known naturalist as a Latin noun in third declension), even though based on a modern surname that preferably is treated in accordance with Rec. 60C.1, epithet in genitive singular: *Aloë ecklonis* Salm-Dyck (1837), *Dimorphotheca ecklonis* DC. (1838) and *Mesembryanthemum ecklonis* Salm-Dyck (1842) based on Ecklon, *Vilfa richardsonis* Trin. (1840) based on Richardson. Adjectives: *Puya berteroniana* Mez (1896) and *Tragus berteronianus* Schult. (1824) based on Bertero. The name *Aristea “eckloni”* is to be correctly cited as *A. ecklonii* Baker (1878) (with a termination in accordance with Rec. 60C.1), not as *A. “ecklonis”* (in third declension).”

Depending on the decisions at various hinge points (e.g., proposals 130, 134 and 143), this may be placed either in the ‘new’ article on epithets based on personal names, after the paragraph of proposal 134, or in the recommendation replacing Rec. 60C.2. It would be conceivable to introduce a date of publication after which such epithets are no longer acceptable. This is very much a 19th century phenomenon. The most recently published name found was *Thalictrum chiaonis* (1944), but this seems intended as a deliberate nomenclatural statement, and is not part of a greater tradition (also, it does not appear to be a name in current use). Names with the epithet *ecklonis* have been published as recently as 1923 (not counting combinations). The genitive inflection of Ecklon and the adjective from Bertero do occur in some fairly well-known current names: *Mesembryanthemum ecklonis* is the basionym of *Delospermum ecklonis* and *Dimorphotheca ecklonis* is the basionym of *Osteospermum ecklonis*.

(154) Add an example to the paragraph of proposal of 134, to be placed after the example of proposal 137:

“*Ex. n.* *Lathyrus “bauhini”* was published to commemorate one of the brothers Bauhin, the implicit latinization being Bauhinus. Since the epithet differs only in a single vowel from the epithet formed by adding a termination to the personal name, this name is to be correctly cited as *L. bauhinii* P. A. Genty (1892). An epithet honouring both brothers Bauhin would be *bauhiniorum*.”

The brothers Bauhin are part of botanical tradition,

and the epithets honouring them have been more often published as *bauhini* rather than *bauhinii*. This is a lone case of an epithet based on a surname that is often latinized in botanical tradition, where the epithets formed from the latinized and un-latinized surnames differ only in -i versus -ii respectively. Preferring *bauhinii* (based on Bauhin) over *bauhini* (based on Bauhinus) would make it easier to explain the *Code*. Instead of *Lathyrus bauhinii*, the example of *Hieracium bauhinii* Schult., commemorating Caspar Bauhin could be used. However, see proposal 155.

(155) Add to the example of proposal of 115:

“*bauhini* based on Bauhinus (either of the brothers Bauhin, *bauhinorum* for both)” and (among the adjectives): “*bauhinianus*”.

This is the reverse of proposal 154.

(156) Add an example to the note of proposal 119:

“*Ex. n.* An epithet based on the modern surname Faber, derived from the Latin word *faber* (craftsman, artisan), should be formed in accordance with Rec. 60C.1. The genitive *fabri*, when honouring the Rev. Ernst Faber, is to be corrected to *faberi* or, when honouring C. Fabre-Tonnere, to *fabrei*.”

The epithet *fabri* is controversial. This is a unique latinization: *faber* is not a Latin name but a second declension noun and to all appearances *fabri* is a descriptive epithet (“of the craftsman”). *Faber* only became a surname in the late Middle Ages. Noteworthy is that when Craib made the combination in *Abies* based on *Keteleeria fabri* he did not accept the *fabri* but used *faberi*. Currently *Abies fabri* and *Acer fabri* are widely accepted names (see <http://www.rhs.org.uk/rhsplantfinder>) although neither tree is widely cultivated. The epithets *fabri* (in up to five current names?) are exceptional: of the names with the epithet originally published as *faberi*, honouring the same Rev. Faber, the Flora of China (see <http://mobot.mobot.org/W3T/Search/FOC/projfsoc.html>) recognizes between 16 and 25 as in current use. However, see proposal 157.

(157) Add a note after the note of proposal 117:

“*Note. n.* An epithet formed by treating the surname Faber as a latinized form with genitive *fabri* (although not recommended) is to be accepted as correct.”

This is the reverse of proposal 156. Note that this would cover *Castanopsis fabri* and *Clethra fabri* as well as *Abies fabri* and *Acer fabri*, but not *Carex fabri* and *Quercus fabri*, which honour C. Fabre-Tonnere and concern a latinization affecting only the ending (cf. Art. 60 Ex. 11) and are to be corrected to *fabrei*. Note also proposal 136, which bears on the question of *fabri* and *faberi* as distinct spellings.

(158) Add an example to the paragraph of proposal 157:

“*Ex. n.* The combination *Abies “faberi”*, based on *Keteleeria fabri*, is to be correctly cited as *A. fabri* (Mast.) Craib (1920).

CITATION

Citation is not orthography, but both citation and orthography deal with the way names are put to paper, so these proposals (of limited scope) are included here rather than submitting them separately. The first half of this set of proposals is the result of a point raised by Guido Mathieu on the e-mail discussion forum Taxacom (<http://listserv.nhm.ku.edu/archives/taxacom.html>, from 5 October 2003 onward). At issue was the inclusion of unpublished (provisional, manuscript, etc.) names in internet databases. Such ‘names’ are useful in ‘helping things along’ until a name can be validly published, but must be separated from ‘real’ names. Although peripheral to the workings of the *Code*, this is a genuine issue. These proposals are submitted mostly to bring up the topic for consideration. Note that the second half (164–179) is purely editorial.

(159) Replace Rec. 50A.1 and 50B.1 by a single recommendation on names that are not validly published, the first paragraph to be:

“50A.1. In referring to a name that is not validly published (see Art. 32) every care should be taken not to give the impression that it is a name in the sense of this *Code* (see Art. 6.3 and 12.1); the more so when this name meets the requirements of Chapter III of this *Code*.”

Rec. 50A and 50B both deal with names that are not validly published. It is proposed to unite these recommendations to form a single one on citing such names, and to expand the number of cases dealt with by this recommendation. Rec. 50A is reworded to eliminate “invalid” (an addition in 1994), which is a choice of word traditionally not used in the *Code* (cf. *Regnum Veg.* 56: 16. 1968), and rightly so: a name in the sense of the *Code* is valid (Art. 6.3); if it is not valid then it is not a name and it has no status under the *Code* (Art. 12). Instead of “Art. 32” it would be possible to use “Section 2 of Chapter IV”. However, “Art. 32” is easier to read and Art. 32.1(d) requires the provisions of Section 2 to be met.

(160) Include a second paragraph in the new recommendation of proposal 159, beginning with:

“50A.2. In the citation of a name that is not validly published, an abbreviation should be added: “nom. nud.” (or “nomen nudum”) if a description has never been published (see Art. 32.1(c)); “pro syn.” (or “as synonym”) if it is merely cited as a synonym (see Art. 34.1(c)); ...”

The cases listed here may each be given the status of a clause, which will help readability and facilitate the insertion of examples (Rec. 50B Ex. 1 and perhaps some new examples).

(161) One of the cases to be included in the paragraph of proposal 160 to be:

“nom. prov.” if it has been merely proposed in anticipation of future valid publication (see Art. 34.1(b), see also Rec. 23A.3(i));”

There is a degree of uncertainty here, in that unpublished names might be separated into several separate cases. Is the name being put into print by the person to whom it is ascribed, or by somebody else? In the latter case, is the author still alive to publish the name validly him- or herself? Is the name likely to be published validly in the future or is it only in the literature? Is the name ascribed to somebody, or is it given without “author citation”? Besides “nom. prov.” it may be possible to use “ms.” or “ined.” here, possibly for different categories. This proposal is made primarily to bring this matter up for consideration and, therefore, is kept close to the letter of the *Code*. Any widespread custom that should be considered here could be brought to the attention of the Nomenclature Section in Vienna.

(162) One of the cases to be included in the paragraph of proposal 160 to be:

“nom. oppr.” if published in a work listed in Appendix V, in a rank specified there;”

Likely such names will not often be cited, but it seems prudent to provide for them.

(163) The conclusion of the paragraph of proposal 160 to be:

“nom. inval.”, “nom. non rite publ.” or “non rite publ.” if it does not fit in a category indicated above.”

Of the terms suggested here, “nom. inval.” is in fairly widespread use and is the shortest and most handy. However, a name that is not validly published is, under this *Code*, neither a name (Art. 6.3 and 12.1) nor invalid (see Subject Index) so that the abbreviation “nom. inval.” should be used with caution, lest it give rise to confusion. On the other hand, “(nom.) non rite publ.” (“(nomen) non rite publicatum”, “(name) not properly/rightly published”) is not only closer to the spirit of the *Code*, and thus more elegant, but is also the abbreviation given by Stearn (*Bot. Latin*: 523. 1997, under “validly”). An extra option would be to include “ined.” here, although it might better be reserved for names that are still in the process toward valid publication.

(164) Include a new recommendation, to be placed before Rec. 50C, with one paragraph:

“50N.1. In the citation of a name that was nomenclaturally superfluous when published and that is illegit-

imate (see Art. 52.1), the abbreviation “nom. illeg.” should be added.”

There is a grey area here in that, under Art. 52.1, a name is defined as illegitimate because it was nomenclaturally superfluous when published. This suggests that both “nom. illeg.” and “nom. superfl.” might be used. However, Art. 52.3 extends “nomenclaturally superfluous when published” to include cases of legitimate names, leaving only “nom. illeg.” (as used in App. IIIA). This does not take into account names that are illegitimate by Art 18.3 and 19.5 (also see proposal 199).

(165) Add an example to the recommendation of proposal 164:

“*Ex. 1. Argania sideroxylon* Roem. & Schult., Syst. Veg. 4: 502. 1819, nom. illeg.”

(166) Add a note to the paragraph of proposal 164:

“*Note 1.* In the citation of a name that was nomenclaturally superfluous when published, but that is not illegitimate (see Art. 52.3), the abbreviation “nom. superfl.” or “comb. superfl.” should be added.”

(167) Include ““(that is illegitimate by Art. 53–54)” in Rec. 50C:

“The citation of a later homonym (that is illegitimate by Art. 53–54) should ...” Not every later homonym is illegitimate.

(168) Split Rec. 50C Ex. 1 into three examples, and Rec. 50E Ex. 1 into two examples:

Most of the examples in Section 4 of Chapter IV deal with a single taxon each, which helps readability. In Rec. 50C Ex.1 and Rec. 50E Ex.1 more than one taxon is involved, separated by a semicolon. In Rec. 50E Ex. 2 a semicolon is used to separate different names for one taxon. This does not make for easy readability. Another example in this Section that might be split (into two examples) is Rec. 47A. Ex. 1. Also note Art. 46 Ex. 7, where splitting it (into two examples) would be less useful, since the two taxa involved are well separated by text; also this would mean extensive renumbering (up to Ex. 29).

(169) Add an example to Rec. 50E.1, as amended by proposal 047:

“*Ex. 1 ter. Glechoma* L. (1753), orth. cons., “*Glechoma*”.”

(170) Add a paragraph before Rec. 50E.2:

“*50E.1 bis.* If a name has been rejected and has been placed on the list of nomina utique rejicienda (see Art. 56 and App. IV) the abbreviation “nom. rej.” should be added in a full citation.”

It may seem that “nom. rej.” would fit best for a

rejected name in the sense of Art. 14.4, whereas a rejected name in the sense of Art. 56 could be a “nom. ut. rej.”. However, names against which others have been conserved (in the sense of Art. 14.4) will not be cited often: in general the correct name followed by “nom. cons.” will suffice: this will allow anybody interested to look up the details in the relevant Appendix of the *Code*. The only rejected names that are likely to be cited are those of App. IV. It might be worth considering adding “comb. rej.” here for combinations based on rejected names, but that may well be overdoing things. If this proposal is passed, the paragraph should be referred to in Art. 56.

(171) Add an example to the paragraph of proposal 170:

“*Ex. 1 quater. Betula alba* L. (1753), nom. rej.”

A nice, classic example of a name which can still, occasionally be found at large.

(172) Add a note to the paragraph of proposal 170:

“*Note 1.* This also applies to any combination based on a nomen utique rejiciendum (see Art. 56.1).”

(173) Add an example to the note of proposal 172:

“*Ex. 1 quinques. Dryobalanops sumatrensis* (J. F. Gmel.) Kosterm. in *Blumea* 33: 346. 1988, nom. rej.”

This is an example of a combination based on a rejected name, and that is therefore itself rejected. Depending on what is decided on proposal 170, “nom. rej.” here may be changed to “comb. rej.”.

(174) Add a paragraph before Rec. 50E.2, to be placed after the paragraph of proposal 170:

“*50E.1 ter.* While a proposal to conserve or reject under Art. 14 or 56 is pending (see Rec. 14A and Art. 57), the abbreviation “prop.” should be included in the relevant abbreviation in a full citation of the name involved, i.e. “nom. cons. prop.”, “nom. rej. prop.”, etc.”

If this proposal is passed, the paragraph should be referred to in Rec. 14A and Art. 57.

Note that a somewhat parallel case exists in Rec. 32F.1. This might be incorporated here, but then this paragraph had better become an independent recommendation, as Art. 32.7 concerns a proposal to take away the status as a name. It might also be dealt with in the recommendation of proposal 159–163 in a paragraph analogous to this proposal.

(175) Move “(see Rec. 50E)” from Art. 14.2 to 14.1:

This “(see Rec. 50E)” originally (since 1961) was part of Art. 14.1, but when (in 1983) the paragraph was split, it was moved to Art. 14.2, not to best effect. Art. 14.1 deals with, among other things, how to find and rec-

ognize existing nomina conservanda, whereas Art. 14.2 deals with the question of what names are deserving of conservation. This Rec. 50E deals with citation of nomina conservanda, which is part of how to recognize them.

(176) Add a reference in Art. 14.2:

“(see Art. 57 and the resolution of the XV International Botanical Congress, Yokohama (in *Regnum Veg.* 131: xiv. 1994)).”

With the removal of “(see Rec. 50E)” it seems it would be advantageous to have Art. 14.2 refer to something that offers guidance, such as this resolution of the XV International Botanical Congress. Perhaps this resolution could be either reproduced in the *Code* or rephrased to become part of the *Code* (as a recommendation in Art. 14 or Art. 57)?

(177) Add “(see also Art. 57)” to Rec. 14A:

Rec. 14A deals with usage of a name while a proposal to conserve or reject is pending. Art. 57 deals with a specific such case and it would be well to refer to it here.

(178) In Art. 34.1(a) replace “in the original publication” by “upon publication”:

“(a) when, upon publication, it is not accepted by the author;”

Through most of the *Code*, the term “original” refers to the moment of valid publication: “original material” (Art. 9.2), “original form” (Rec. 50F), “original spelling” (Art. 60.2) and “original publication” (Art. 61.3). Thus, in Art. 34.1 (dealing with names that are not validly published), the use of “original” is unfortunate. Conceivably, Art. 34.1(a) could be misread to mean that when an author in a publication mentions a name (not accepting that name in that publication) then a later valid publication is no longer possible since the author did not accept it “in the original publication”. It is not entirely clear why the 1966 Editorial Committee changed the original (1952–1961) “when it is not accepted by the author who published it”, which seems satisfactory (“publishes” would be better). The words “upon publication” are those of Ex. 2 and seem as elegant as any.

(179) In Art. 34.1(b) replace “group” by “taxon”:

Before 1952, the term “group” was used as “taxon” is used now. The *Stockholm Code* (1952) saw the introduction of what is now Art. 1.1, stating that, in the *Code*, “taxonomic groups ... will be referred to as taxa”, and throughout the text replaced “group” by “taxon”. Although this provision first appeared in the *Code* at that same time (having been accepted in 1935), “group” was retained in Art. 34.1(b) for unknown reasons. The *Code* deals with nomenclature, not with taxonomy: it does not define a “taxonomic grouping”. The “group” in Art.

34.1(b) must, for it to be worth discussing, be recognizable as distinct, from a taxonomic perspective. Even in the worst case it would still be a “taxon”, albeit one of an undesirable nature, namely an unnamed taxon.

ACKNOWLEDGEMENTS

I wish to thank Eric Gouda (at the Botanical Gardens of Utrecht University, <http://botgard.bio.uu.nl/taxonomy/ortho.htm>) and Raimund Aichbauer (<http://www.nehosoc.nl/orthography.htm>), for hosting the web pages that demonstrate the possible effect of these proposals, and Rosemary Davies, of the Royal Botanic Gardens, Kew, for looking up derivations in references otherwise difficult to access. Obviously compiling these proposals would not have been possible if the databases of the International Plant Names Index (IPNI; <http://www.ipni.org/>) and, to a lesser extent, the Missouri Botanical Garden’s W3TROPICOS (<http://mobot.mobot.org/W3T/Search/vast.html>) had not been available online, and if the library of Utrecht University (staffed by Guda Bernard-Glijnis) had not been available for the traditional legwork.