

## PROPOSALS TO AMEND THE CODE

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## (018–020) Proposals to amend Articles 9.1, 9.2, 9.11 and the Glossary of the *Melbourne Code*

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Article 9.1 of the *Melbourne Code* (McNeill & al. in *Regnum Veg.* 154. 2012) states that there are two ways to establish a holotype:

“9.1. A holotype of a name of a species or infraspecific taxon is the one specimen or illustration (but see Art. 40.4) *used* by the author, or *designated* [emphasis ours] by the author as the nomenclatural type. As long as the holotype is extant, it fixes the application of the name concerned (but see Art. 9.15).”

Thus, a holotype may be (1) designated, as is mandatory nowadays, or it is (2) established *by usage* if it is the only specimen or illustration used by the describing author(s). The criterion of usage applies only before 1958, at which point it became mandatory to indicate a type (Art. 40.1).

Note that under the criterion of usage (before 1958), the single specimen or illustration *does not* have to be indicated (i.e., cited, designated, or mentioned) in the protologue. It serves as the holotype if it was the only element used by the author, whether indicated or not.

The criterion of usage is less familiar to taxonomists today than the first method of explicitly designating a holotype. This probably explains why the *Code* itself *completely misses the idea of usage* in the very next Article, Art. 9.2. Note the omission:

“9.2. A lectotype is a specimen or illustration designated from the original material as the nomenclatural type, in conformity with Art. 9.11 and 9.12, if no holotype was indicated [STOP!: Do you see the word *usage* here?] at the time of publication, or if the holotype is missing, or if a type is found to belong to more than one taxon (see also Art. 9.14). For sanctioned names, ...”

The same omission occurs in Art. 9.11 on the designation of a lectotype:

“9.11. If no holotype was indicated by the author of a name of a species or infraspecific taxon ...”

Because Art. 9.2 and 9.11 do not take into account *usage*, i.e., without indication of type, as permitted in Art. 9.1, they must be modified.

Two basic changes need to be made. First, Art. 9.1 would be clearer if it emphasized that a holotype can be established by usage without indication. This would sensitize taxonomists to this second method of establishing a holotype, making them less likely to overlook

it. Second, Art. 9.2 and 9.11 must be rephrased to allow for *usage* as permitted in Art. 9.1. Accordingly, we propose the following changes to Arts. 9.1, 9.2 and 9.11. The definition of “holotype” in the glossary would be amended accordingly editorially.

### (018) Amend Art. 9.1 to read (deletions in strikethrough, insertions in bold):

“9.1. A holotype of a name of a species or infraspecific taxon is the one specimen or illustration (but see Art. 40.4) **either (a) indicated used by the author, or designated by the author(s) as the nomenclatural type or (b) used by the author(s) when no type was indicated.** As long as the holotype is extant, it fixes the application of the name concerned (but see Art. 9.15).”

And accordingly amend the definition of holotype in the Glossary.

### (019) Amend Art. 9.2 to read (deletions in strikethrough, insertions in bold):

“9.2. A lectotype is a **one** specimen or illustration designated from the original material as the nomenclatural type **if**, in conformity with Art. 9.11 and 9.12, **if the name had no holotype was indicated** at the time of publication, or if the holotype is **missing lost or destroyed**, or if a type is found to belong to more than one taxon (see also Art. 9.14). For sanctioned names, a lectotype may be selected from among elements associated with either or both the protologue and the sanctioning treatment (Art. 9.10).”

And accordingly amend the definition of lectotype in the Glossary.

### (020) Amend Art. 9.11 to read (deletions in strikethrough, insertions in bold):

“9.11. If **no holotype was indicated by the author of a name of a species or infraspecific taxon had no holotype at the time of publication**, or when the holotype or previously designated lectotype has been lost or destroyed, or when the material designated as type is found to belong to more than one taxon, a lectotype or, if permissible (Art. 9.7), a neotype as a substitute for it may be designated.”