

(373) Delete Art. 20 Ex. 4–6; insert a new clause in Art. 20.4 (new text in bold):

“20.4. The following are not to be regarded as generic names:
[...]

(n) Some words that have been widely used in pharmacopoeia or as descriptive morphological terms: *Balsamum, Bulbus, Caulis, Cortex, Flos, Herba, Lignum, Oleum, Radix, Spina*.”

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We are grateful to Emma Wrangmore for providing feedback on generic designations associated with Art. 20.2 in IPNI, and to Michael Guiry, Paul Kirk and Alexander Doweld for their primary roles in providing to the scientific community data on algal, fungal and fossil names through AlgaeBase, Index Fungorum and the International Fossil Plant Names Index, respectively.

(374) Proposal to amend Article 38.3 to clarify what local, indigenous or traditional information is to be accepted in a validating description or diagnosis

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Information obtained from traditional knowledge of various peoples of the world was, and still is, widely used in taxonomy of plants and fungi. Ethnobotany and ethnobotanical linguistics are also important for exploration and conservation of biodiversity (e.g. Young, Ethnobotany, 2007; Berlin, Ethnobiological Classification: Principles of Categorization of Plants and Animals in Traditional Societies, 2014). Vernacular, folk and traditional plant names are often condensed forms of traditional knowledge, reflecting morphology, ecology, utility and other qualities of the plant taxa (see, e.g., Hidayati & al. in Franco & al., Case Studies in Biocultural Diversity from Southeast Asia: Traditional Ecological Calendars, Folk Medicine and Folk Names: 167–225, 2022, https://doi.org/10.1007/978-981-16-6719-0_7), and thus they can be reflected also in scientific names of organisms.

Hayova & al. (Prop. 221 in Taxon 72: 455, 2023) proposed “to add a new Recommendation after Article 38, with the advice to report local/indigenous vernacular names (if available) of new taxa and to use such names, if appropriate, in scientific nomenclature”. If the proposal of Hayova & al. (l.c.) is accepted, protologues of new taxa might therefore contain vernacular names and/or cite publications containing traditional knowledge. Actually, Art. 6.13 footnote of the *Shenzhen Code* (Turland & al. in Regnum Veg. 159, 2018) provides no restriction on the kind of information already allowed to be included in the protologue, but if the proposal of Hayova & al. (l.c.) is accepted, such inclusions may become far more common. This kind of information from the protologue might appropriately be used for various purposes related to plant taxonomy and nomenclature.

However, not all information in the protologue can be used in a “description or diagnosis” required by Art. 38.1 for valid publication of a new name. The current proposal is to make it clear that any “description or diagnosis” mandated by Art. 38.1 is limited to

morphological characteristics (and possibly, in future, DNA sequences, see Thiele & al. in Taxon 72: 965–973, 2023) of the taxon itself, and does not include any reference to any other human cognizance of the taxon, whether that be scientific (“geographical origin, or geological age”, see Art. 38.3) or traditional/cultural.

There could be a situation when the local or indigenous name is in fact descriptive (e.g. meaning “white-flowering tall shrub” or “prickly wide-leaved weed”). A mere citation of such descriptive names, in the past or in the future, should not be sufficient to constitute a description or diagnosis under Art. 38.1. If such names are in a language other than those permitted by Art. 39, they might arguably not be considered part of the validating “description or diagnosis” anyway, but this proposal makes that clear and avoids any such arguments.

On the other hand, there could be a situation when an author of a name refers to some earlier publication on traditional knowledge, which contains a morphological description of the taxon, i.e. a description not relying on properties ruled out by Art. 38.3. In that case, it can be accepted as the validating “description or diagnosis”; there is no good reason why such a morphological description should not be cited.

An addition to Art. 38.3 is therefore proposed.

(374) Amend Art. 38.3 as follows (new text in bold):

“38.3. The requirements of Art. 38.1(a) are not met by statements describing properties such as purely aesthetic features, economic, medicinal or culinary use, cultural significance, cultivation techniques, geographical origin, or geological age; **or by statements indicating local or indigenous vernacular names (even descriptive ones); or by statements citing non-descriptive traditional knowledge.**”

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(375–376) Proposals to address valid publication based on information in the protologue (Articles 40, 8 Ex. 3 and 9.2)

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Article 40.2 of the *Shenzhen Code* (Turland & al. in Regnum Veg. 159. 2018) states that for purposes of publishing a new species name, “indication of the type as required by Art. 40.1 can be achieved by reference to an entire gathering”. In our view, it is implicit that Art. 40.2 is not satisfied if the referenced material is more than one gathering even if this fact is not apparent in the protologue. However, based on Prop. 163–164 by Mosyakin & McNeill (in Taxon 71: 1325–1326. 2022), there is a difference of opinion on this issue.

Article 8 Ex. 3 illustrates this matter. It states that because the apparent holotype includes material “collected at more than one time, it belongs to more than one gathering and cannot be accepted as a type. Raudonat & Rischer’s name is not validly published under Art. 40.2.” It is important to note that the Example does not make any statement about the actual language of the protologue. In our view, this Example is correct because there is no reference to a single gathering, as required by Art. 40.2, if the referenced item consists of more than one gathering. Whether this is apparent from the protologue is irrelevant.

We offer the following changes to the Example to make this point more explicit.

(375) Amend Art. 8 Ex. 3 as follows (new text in bold, deleted text in strikethrough):

“Ex. 3. The protologue of “*Echinocereus sanpedroensis*” (Raudonat & W. Rischer (in *Echinocereenfreund* 8(4): 88–97. 1995) states “**Holotypus: Mexico, Edo Sonora, Rancho San Pedro, Ri. 263, cult. W. Rischer Mai 1995 (ZSS), AX 16502**”. **While the protologue contains no additional information as to the contents of this** ~~was based on a~~ “holotype”, ~~it consisting~~ **consists** of a complete plant with roots, a detached branch, an entire flower, a flower cut in halves, and two fruits that, according to the label, were taken from the same cultivated individual at different times and preserved, in alcohol, in a single jar. Because this material was collected at more than one time, it belongs to more than one gathering and cannot be accepted as a type. Raudonat & Rischer’s name is not validly

published under Art. 40.2, **even though there is nothing in the protologue indicating the holotype is more than one gathering.**”

We also recommend that the Editorial Committee move this Example to Art. 40.

Examples (other than voted Examples) are not comparable to a rule and are “solely for illustrative purposes” (Art. 8 footnote 1). While we believe that Art. 8 Ex. 3 is fully supported by Art. 40.2, some clarification of the rules appears desirable to address whether external evidence on what is referenced in the protologue is relevant to determine if the publication rules are satisfied. In this regard, we note that Art. 9.2 already addresses certain errors and omissions in the protologue. It states “If a designation of holotype made in the protologue of the name of a taxon is later found to contain errors (e.g. in locality, date, collector, collecting number, herbarium code, specimen identifier, or citation of an illustration), these errors are to be corrected provided that the intent of the original author(s) is not changed. However, omissions of required information under Art. 40.6–40.8 are not correctable.” Because this Article mentions Art. 40.6–40.8, it also applies to the valid publication rules in Art. 40.

To further address this issue, consider the following hypothetical example. Assume that the protologue of a new name that is otherwise validly published by Santa (2023) states “Holotype: North Pole, December 25, 2020, *Santa* 302 (H)”. If the actual specimen is *Santa* 320 or *Santa* 802, Art. 9.2 treats the name as validly published. However, if *Santa* 302 consists of more than one gathering, it is not an error but is equivalent to an omission. Similarly, if *Santa* 302 is a photograph, we do not think it is correctable in light of Art. 40.4, which provides that the type may not be an illustration on or after 1 January 2006 (except as provided in Art. 40.5).

We also note that the statement in Art. 9.2 that omissions of required information are not correctable is better placed in Art. 40. If that information is not provided, the name is not validly published, and there is no holotype to be corrected.

We offer the following proposal to address this matter.