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Reviewed work(s):

Source: *Taxon*, Vol. 47, No. 4 (Nov., 1998), pp. 919-924

Published by: [International Association for Plant Taxonomy \(IAPT\)](#)

Stable URL: <http://www.jstor.org/stable/1224211>

Accessed: 02/06/2012 01:39

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(106-121) Report of the Special Committee on Orthography, with 16 proposals to amend the Code, mainly its Art. 60.

Gea Zijlstra, Secretary¹

The set-up of a Special Committee on Orthography was authorised by the Nomenclature Section of the Tokyo Congress when it discussed (see Englera 14: 206-215. 1994) several proposals by Brummitt & Taylor (in Taxon 41: 610-611. 1992). Manara's proposals (in Taxon 39: 368-371) were referred to the Committee as well.

The Committee did not have a good start. The convener died, another member was ill during most of 1997 and did not contribute, a third member never responded. On the other hand, one 'ex-officio' member (Nicolson) and two correspondents (Adolphi and Brummitt) were active in the discussions, and the correspondents became members, even though Adolphi due to other commitments had to resign before the Committee finished its task. The Committee thus started with six members but was reduced to five members when the second half of the proposals was voted on: Brummitt, Jeffrey, Perry, Traverse, and Zijlstra (the Secretary).

The Committee started by discussing many examples (those from Brummitt & Taylor and others that had been gathered by the Secretary), with the aim to find main lines of argument from which guidelines and prospective proposals could be derived. Most of the discussions related to Art. 60.1-3, some others to Art. 60.6 and 60.9 (several requests to reconsider diaeresis and hyphen had been received). Extensive discussions on Art. 60.7 and 60.11 took place between Perry and Zijlstra, without agreement, before the matter was submitted to the other members, who added a few comments in the final stage. The Committee was unable to consider the Manara proposals.

A number of proposals did not achieve a qualified majority because of the Committee's composition. Two of its six members qualify as extreme non-correctors, three would correct under strict conditions only, whereas the sixth held that "the permission to correct errors has been in the *Code* for a very long time, and many corrections have been made accordingly, and I don't see the need to introduce a lot of bureaucracy to approve them all". He agreed that two examples, in particular, "seem to point in opposite directions" (the *Gluta* case of Ex. 3 and the *Cereus* case of Ex. 6), and at a very late stage suggested a proposal to explain this contradiction: an additional sentence to the effect that long-established usage overrides all other considerations. The Secretary felt unable to draft a proposal to that effect which she could herself approve, and could not imagine that enough members would favour it. Had it been made, it would have signified a fourth option for the *Gluta* example, which plays a key role. None of the three options that the Committee had thus far considered had received sufficient support to be included here.

Some of the Committee's discussions on the liberty to correct epithets is summarised here. When discussing correctability of epithets, the Committee considered the examples in Art. 73, Prop. C, D and E of Brummitt & Taylor. In every case a majority was against allowing correction, for various reasons (in brackets the number of the seven members that used that argument):

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- *Bignonia callistegioides* should not be corrected to *B. calystegioides* (5 : 2) because *callistegioides* is a correct word (2), on publication there was comparison with '*Callistegia*' (2), *callistegioides* is the original spelling (1), and *callistegioides* has not been corrected by the original author (1). Arguments in favour were: because it is clear that the epithet is derived from *Calystegia* (2), and the correction was already made long ago (1).
- *Solanum rohrii* should not be corrected to *S. rothii* (4 : 2 : 1) because in the original publication its author (Wright) mentioned 'Rohr' (3), this kind of corrections no longer should be made (3), Wright, when in 1906 he noticed his error, retained *rohrii*, the correction of his misreading was not made him but proposed by Brummitt & Taylor in 1990 (2), and *S. rohrii* is the spelling in use (1). Arguments in favour were that 'Rohr' was an error for 'Roth' (1).
- *Cassia langsdorffii* should not be corrected to *C. langsdorffii* (5 : 1 : 1) because the person commemorated was not mentioned (4), the correction was not made by the original author but by Brummitt & Taylor in 1990 (2), the deletion one 'f' might be considered a matter of latinisation (1), the spelling 'Langsdorf' also was in use for the person commemorated (1), and *C. langsdorffii* is the spelling in use (1). Arguments in favour were that the name of the person commemorated usually is written 'Langsdorff' (1), and, with hesitation, the desirability to standardise.

The Committee considered 42 proposals, of which 16 were supported by 60 % or more of its voting members. The votes are given after each proposal (for : against).

Proposals on Art. 60.1-3

Debates on the question 'to correct or not to correct?' (Brummitt & Taylor in Taxon 39: 298-306. 1990) are mostly due to different interpretations of Art. 60, especially 60.1 and 60.3. Some authors place emphasis on the liberty to correct whereas others are reluctant to correct. The need is felt to define more precisely which corrections are permitted and have to be accepted when already made, and which changes should not be made and must not be condoned if made earlier. It was not possible, however, to find arguments that would be acceptable for a majority.

(106) *Reword Art. 60.1 as follows (additions are in italics)* (4 : 2):

"60.1. The original spelling of a name or epithet is to be retained, except for the correction of typographical or orthographical errors (*Art. 60.3*) and the standardisations imposed by Art. 60.5 (u/v or i/j used interchangeably), 60.6 (diacritical signs and ligatures), 60.8 (compounding forms), 60.9 (hyphens), 60.10 (apostrophes), and 60.11 (terminations; see also Art. 32.6). *In all other cases, an altered spelling should not be used, unless it is conserved or a proposal for conservation is pending or being prepared (see Art. 14.11).*"

The proposed text implies three changes: (a) A reference to Art. 60.3 is added, that should indicate which typographical or orthographical errors are to be corrected and which alterations are not to be made; (b) from the enumeration at the end of Art. 60.1, the words "as well as Rec. 60.H" are deleted, which had been added editorially after the Tokyo Congress, even though the Nomenclature Section did not consider the matter; (c) a second sentence is added, to make it clear that there is no latitude in accepting or rejecting an earlier change of spelling of a name or epithet: an alteration of the spelling not permitted under the rules can be achieved only by conservation. With this sentence added, it is no longer necessary to retain Note 1 (see next proposal).

(107) Delete Art. 60 Note 1 and Ex. 5 (4 : 2).

The proposed new wording for Art. 60.1 mentions the possibility of conservation of spelling for all names. The example is superfluous.

Occasional but increasing misuse of Note 1 was noticed, when it is thought to imply that an altered spelling of a generic name can be maintained only by conservation. From the *Lespedeza* example (Ex. 6) we think this assumption is wrong. If correction of a generic name were never justified, it would not be necessary to have an example illustrating that a certain generic name must not be corrected.

(108) Reduce Art. 60.2 to a Note, to precede Ex. 1 (5 : 1).

The text of this paragraph does not introduce anything new, it merely defines a term. Before the Leningrad Congress it was a Note, and there is no reason why it be given 'higher' status. Just compare this case with e.g. Art. 33 Note 1; in other similar cases (Art. 9.3, 9.4 and 9.7), the *Code* even has such information in a footnote.

(109) Add two examples after Art. 60 Ex. 1 (4 : 2):

"Ex. *Ibis*. *Cionosicyos* Griseb. (1860; original spelling occurring twice) is not to be altered to "*Cionosicyos*", as in Bentham & Hooker (Gen. Pl. 1: 826. 1867). Jeffrey (in Kew Bull. 25: 200. 1971) was correct in adopting the original spelling.

"Ex. *Iter*. *Stenanona* Standl. (1929) and *Dicranoweisia* Lindb. ex Milde (1869) are not to be corrected to "*Stenannona*" and "*Dicranoweissia*" by analogy to *Annona* L. (1753) and *Weisia* Hedw. (1801), respectively."

The Committee discussed the trend to standardise generic names that have been formed by analogy with an older generic name, and is opposed to it. In the case of *Cionosicyos*, Jeffrey (a specialist in this group) has now accepted the "*Cionosicyos*" spelling. There are several more names formed by analogy with "*Anona*" or "*Weisia*": *Anonaceaephyllum*, *Anonaspermum* (both correct names of fossil plants), *Diclinanona*, and *Anonidium* (correct names in *Annonaceae*), *Gyroweisia*, *Kleioweisiopsis*, *Oreoweisia*, *Pleuroweisia*, *Rhabdoweisia*, *Rhabdoweisiella*, and *Weisiopsis* (correct names in *Musci*), when only the illegitimate *Pseudoweissia* has a double "s".

(110) Replace Art. 60.3 by the following text (4 : 1):

"60.3. If there is a clear typographical error (i.e., evident from the name itself, without study of the protologue) a correction has always to be made. For the rest, there is a restricted liberty to correct an orthographical error. The liberty of correcting a name is to be used with reserve, especially if it concerns a generic name or if the change affects the first letter of the name or epithet."

Besides compulsory standardisations, corrections of clear typographical errors must always be made. The distinction between 'typographical' and 'orthographical' errors, however, is not always clear, and according to several Committee members some other errors also might deserve correction. Proposals to define these did not achieve the required 60 % majority within the Committee.

The proposed text is essentially the same as present Art. 60.3, with three differences: clear typographical errors are considered as a separate category, the 'first syllable' phrase has been deleted (we have never seen this used), and a generic name phrase is added because the Committee was (almost?) in agreement on this point.

(111) Place Art. 60 Ex. 4 after Art. 60.3, amended as follows (5 : 1):

"Ex. 4. Clear typographical error: The misspelled *Indigofera* "*longipednuculata*" Y. Y. Fang & C. Z. Zheng (1983) is to be corrected to *I. longipedunculata*."

The one dissenting vote reflects agreement with the new placement but not with the rewording.

(112) *Add a Note after Art. 60.3, followed by Ex. 6 (second item) and a new example (4 : 2):*

“*Note Ibis.* An epithet may not be corrected because it is inappropriate, meaningless or disagreeable (see Art. 51).”

“*Ex. 6bis. Mammillaria esperanzaensis* Boed. (1933) may not be corrected to *M. “esperanzaensis”*, as done by Heath (in *J. Mammillaria Soc.* 29: 57. 1989).”

With respect to the new example, there is no rule permitting that such a disagreeable ‘a’ be deleted, and a correction that is not necessary should not be allowed.

A proposal on the diaeresis

The Committee considered the diaeresis clause of Art. 60.6 for two reasons: because the present wording in the *Code* is ambiguous, and because some taxonomists would like a change, to disallow a diaeresis. The tendency to omit the diaeresis is evident from several recent books: *NCU-3* (1993), Brummitt (*Vasc. Pl. Fam. Gen.*, 1992) and Gunn & al. (*Fam. Gen. Spermat.*, 1992).

Among taxonomists, four interpretations of the clause “the diaeresis ... is permissible” can be noted: (1) it is permitted to add a diaeresis in names that originally have been published without (and: a diaeresis added at publication of a name, of course should not be deleted); (2) if a name has been published with a diaeresis, this must be retained, but if published without, it is not permitted to add a diaeresis; (3) if a name has been published with a diaeresis, one may choose either to retain or to delete it; and (4) you may delete or add a diaeresis, as you like.

Within the Committee, all these options, plus (5) to disallow the diaeresis, were discussed. Interpretation (4) reflects the opinion of only one member, who does not want a change. The remaining members were against the option to add a diaeresis, so interpretations (4) and (1) were both cancelled. Two members who originally said that options (2) and (3), respectively, reflect their own policy, eventually opted for deletion, which was also favoured by the fifth member. This is what is being proposed.

It was not possible to find a majority for a second proposal, to clarify the present rule for the case that the Section should not accept the Committee proposal.

(113) *Replace the diaeresis clause in Art. 60.6 by the following (4 : 1):*

“The diaeresis, used in the original publication of names such as *Cephaëlis* and *Isoëtes* to indicate that a vowel is to be pronounced separately from the preceding vowel, is not permitted;”

The diaeresis is a pronunciation mark, and there is no reason to rule that no diacritical signs should be used except the diaeresis. The diaeresis has not been used consistently. Many names that had a diaeresis upon publication are met regularly without. Moreover, there are many cases in which two vowels are pronounced separately and might have had a diaeresis, but none was used originally.

The Committee is aware of Trehane’s intent to propose deletion of the diaeresis clause. Because that clause has long been in the *Code*, we consider it preferable to state explicitly that the diaeresis is not permitted. It is not really a matter of orthography, so simply removing all mention of diaeresis will not prevent it from being used.

If this proposal is accepted, the diaeresis in Art. 60 Ex. 13 will have to be deleted.

Proposals concerning the hyphen

There are different reasons to reconsider the hyphen provisions: the problem to accept a hyphen in a generic name, and problems in interpreting the present Art. 60.9, which might seem inconsistent with the correlated examples.

(114) *Insert the following sentences at the beginning of Art. 60.9, delete Art. 60 Note 2, and replace Ex. 15 (4 : 1):*

“60.9. In a generic name, the use of a hyphen is not permitted. If a generic name was published in two words joined by a hyphen, these words have to be united into one word.

“Ex. 15. Hyphen to be omitted: *Pseudoabsidia* Bainier (1903), not “*Pseudo-Absidia*”, nor “*Pseudo-absidia*”; *Laurocerasus* Duhamel (1755), not “*Lauro-Cerasus*”, nor “*Lauro-cerasus*”.

There are two problems with the occurrence of hyphens in generic names: (1) many generic names originally were published with a hyphen, when nobody seems to know and all use these names without a hyphen; and (2) when using a computer, it is difficult to alphabetise names with a hyphen.

Ad (1): even in *ING*, for which the original publication always has been checked, names appear without a hyphen although they were published with a hyphen, e.g. *Fitzroya* and *Laurocerasus*, published as *Fitz-Roya* and *Lauro-Cerasus* respectively. These examples also illustrate another problem: is a capital after the hyphen to be retained to conform with original usage? An example of a book that deleted all hyphens in generic names is Ainsworth & Bisby’s *Dictionary of fungi*, ed. 8 (1995), which e.g. has *Leucoinocybe* and *Pseudoabsidia*, both originally hyphenated.

Ad (2): *NCU-3* illustrates the problems that hyphens present to computers: *Neo-urbania* and *Neo-uvaria* are wrongly alphabetised, preceding *Neoabbottiella*.

If this proposal should be rejected, many such generic names would have to be conserved to retain current usage. If it is accepted, the following proposal is necessary.

(115) *Replace Art. 20.3 as follows, amend Art. 20 Ex. 6, and delete Ex. 7 (4 : 1):*

“20.3. The name of a genus may not consist of two words, unless they were originally joined by a hyphen. However, the hyphen must now be deleted (see Art. 60.9).

“Ex. 6. “*Uva ursi*”, as originally published by Miller (1754), consisted of two separate words unconnected by a hyphen, and is therefore not validly published (Art. 32.1(b)). The name is correctly attributed to Duhamel (1755) who published it as “*Uva-ursi*”, a spelling that under Art. 60.9 has to be corrected to *Uvaursi*.”

Ex. 7 is superfluous: correction of the hyphen is covered in Ex. 6 and mandated by Art. 60.9.

(116) *Upon acceptance of Prop. (114), insert a third and fourth sentence in Art. 60.9, and delete the Scirpus sect. Pseudoëriophorum portion in Ex. 13 (3 : 2):*

“In the name of a subdivision of a genus, in a compound epithet the use of a hyphen is not permitted. If a subdivisional epithet was published in two separate words or in two words joined by a hyphen, these words have to be united into one word.”

If e.g. a subgenus or section is raised to generic rank, the epithets in their names can become generic names. Especially when taxonomic opinion differs, it is undesirable that in the generic name the hyphen is to be deleted, whereas it may persist in the corresponding subdivisional epithet.

(117) *In the first line of the present Art. 60.9, add the words italicised below (3 : 2):*
 “60.9. The use of a hyphen in a compound epithet of an (*infra*)specific name is treated as an error to be”

This proposal is necessary upon acceptance of Prop. (116).

(118) *Add a Note after Art. 60.9, with an example (4 : 1):*

“*Note Iquinquies.* It is not permitted to add a hyphen in a compound epithet that originally was published as one word without a hyphen.

“*Ex. 14bis.* It is not permitted to add a hyphen in *Isoglossa eliasbandae* Brummitt (1985), named after the collector Elias Banda.”

With respect to epithets, there is uncertainty on the meaning of the words ‘a hyphen is permitted’. The Committee considers this Note to be the best interpretation of the present rule and to reflect current usage; this policy should be continued. There are many names that under the guidelines of Art. 60.9 might have a hyphen, when none was used originally. We do not want such names to appear with a hyphen.

Miscellaneous orthography proposals

(119) *In Rec. 60C.1(a), insert the phrase (4 : 1):*

“*gray-i* for Asa Gray (m), because a terminal y functions as a [semi]vowel”.

Epithets formed from personal names ending in -y are often seen with the wrong termination. Thus an example is useful.

(120) *In Rec. 60G.1(b), delete the words “cannae-folius (leaf of canna),” (4 : 1).*

This example is wrong.

(121) *After Art. 23.5, add a Note and three examples (4 : 1):*

“*Note 1.* An epithet which is a substantive in the nominative case retains its own gender and form of declension (if any); an epithet which is a substantive in the genitive case retains its own number and gender.

“*Ex. 4bis.* In *Sapium laurocerasus* Desf. (“*laurocerasum*”), the epithet is a substantive derived from the generic name *Laurocerasus*, so its termination -us must be maintained irrespective of the gender of the generic name the epithet is combined with.

“*Ex. 4ter.* In *Masdevallia echidna* Rchb. f. the epithet is the name of an animal. When the species was transferred to *Poroglossum*, the epithet should have remained unaltered: *P. echidna*.

“*Ex. 4quater.* *Convolvulus cantabrica* must not be changed to *C. cantabricus* since the epithet *cantabrica* is a pre-Linnaean generic name used as a noun in apposition.”

When Desfontaines published this species name, he wrote the epithet with an initial capital letter, so that it is evident that he referred to *Laurocerasus* Duhamel (1755; in fact a pre-Linnaean name already used by Clusius). Duhamel originally published his name as “*Lauro-Cerasus*” (see the Committee proposals on hyphens). *Echidna* is a later homonym, the correct name for this animal (the spiny anteater, also echidna in English) is *Tachyglossus*. Luer (1987) corrected Garay’s (1953) *Poroglossum* “*echidnum*”.