ZooBank Policy
Title: Registration of Substitute Names
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I. PURPOSE

This policy establishes procedures for registering substitute names, as required by the Code to replace rejected junior homonyms.

II. POLICY

A substitute name is required when two or more different taxa within the family-group, the genus-group, or the species-group, have the same name. These names are homonyms as defined in Articles 52 to 58. The junior homonym must be rejected and replaced using procedures described in Article 60. The special case of secondary homonyms in the species-group is dealt with in Article 59.

A substitute name for a family-group taxon may also be needed if the name of its type genus is unavailable for any reason.

III. PROCEDURES

Before a substitute name for a homonym can be proposed, it is first necessary to establish that it truly is a homonym, as defined in Articles 52 to 58. The following analysis assumes that this has been done.

A substitute name for a junior homonym may be either (a) a new replacement name (nomen novum); or (b) the oldest of any available and potentially valid synonyms.

1. New Replacement Name

If a junior homonym does not have an available and potentially valid synonym, a new replacement name is needed. To register a new replacement name or nomen novum, the following information must be included in the ZooBank registry:

(i) the junior homonym, which the substitute name is intended to replace, must be registered in ZooBank, in accordance with the relevant policies for registering names;
(ii) the senior homonym must be registered in ZooBank in accordance with the relevant policies for registering names;
(iii) an explicit statement in the ZooBank registry that the junior homonym has no available and potentially valid synonyms;
(iv) the new replacement name (nomen novum) must be registered in ZooBank in accordance with the relevant policies for registering names, with an explicit statement that it is a new replacement name (Article 13.1.3), and that it is intended to be a substitute for the junior homonym;
(v) if the junior homonym being replaced is a genus-group name and does not have a type species, a type species must be designated and registered.

2. Use of an Available Synonym as a Substitute Name

If a junior homonym has any available and potentially valid junior synonyms, the oldest available junior synonym must be used as the substitute name for the junior homonym.

To register an existing name as a substitute name, the following information must be included in the ZooBank registry:

(i) the junior homonym, which the substitute name is intended to replace, must be registered in ZooBank in accordance with the relevant policies for registering names;
(ii) the senior homonym must be registered in ZooBank in accordance with the relevant policies for registering names;
(iii) an explicit statement in the ZooBank registry that the senior homonym has precedence over the junior homonym;
(iv) the available and potentially valid synonym must be registered in ZooBank in accordance with the relevant policies for registering names;
(v) the taxon name usage in which the proposed substitute name was first proposed as a synonym of the junior homonym must be registered in ZooBank;
(vi) the taxon name usage proposing that the substitute name serve as a replacement for the junior homonym must be registered in ZooBank, with an explicit statement that the substitute name is a replacement for the junior homonym;
(vii) if the junior homonym being replaced is a genus-group name and does not have a type species, a type species must be designated and registered.

The taxon name usages indicated in items (v) and (vi) in the above list may be the same.

3. Substitute Name for a Secondary Homonym in the Species-Group

Homonyms in the species-group require special consideration for three reasons, as described in Article 59. First, a valid and available species-group name may become a secondary homonym if it is moved from one genus to another, or if two genera are synonymised. Second, this situation may be reversed if the two species are no longer considered congeneric. Third, Article 59 includes a time limit, so a secondary homonym that is replaced before 1961 is treated differently from one replaced after 1960.

The logical structure for handling a substitute species-group name in these different sets of circumstances is summarised in Figure 1.

The use of an available synonym as a substitute name within the species group depends on a taxonomic judgement that the two species names in question are synonyms. That judgement is potentially subject to change if the synonymy is questioned. This possibility is specifically referred to in Article 60.2.1. If that happens, the next oldest available and potentially valid synonym should be used as a substitute name. The procedure described in section 2 above is then repeated, or if no other synonym is available, a new replacement name is needed as dealt with in Section 1 above.
4. Substitute Name for an Invalid Family-Group Name

The name of a family-group taxon is invalid if the name of its type genus is invalid (Article 39). A substitute family-group name must then be established, either a new replacement name or an available synonym, using the same procedures as described in sections 1 and 2 above. The name of the family-group taxon is formed in accordance with Article 29.
Article 59.2 to 59.4

A species-group name is a secondary junior homonym, but no longer considered congeneric with the senior homonym

- junior homonym has been replaced
  - replaced before 1961 (Article 59.3)
    - substitute name is in use.
      - junior homonym is permanently invalid, cannot be reinstated
        - if this causes instability, ask the Commission for a ruling (Article 59.3.1)
  - replaced after 1960 (Article 59.4)
    - substitute name is not in use.
      - junior homonym is to be reinstated unless it is invalid for some other reason
    - substitute name is not necessary
      - junior homonym has not been replaced (Article 59.2)