### TECHNICAL WORKING PARTY FOR VEGETABLES

Forty-Eighth Session

# **PREPARATORY WORKSHOP**

Paestum, Italy, June 22, 2014

# PROGRAM 1. Introduction to UPOV and the role of UPOV Technical Working Parties (TWPs) 2. Overview of the General Introduction (document TG/1/3 and TGP documents) Characteristics as the Basis for DUS Examination and Selection of Characteristics 3. Guidance on drafting Test Guidelines, (document TGP/7) a) Subject of the Test Guidelines, Material Required and Method of Examination; b) Method of Observation (MS, MG, VS, VG); c) Types of Expression (QL, PQ, QN), notes and distinctness; d) Shape and Color Characteristics; e) Example Varieties; f) The process for developing UPOV Test Guidelines, including: TG Template; Additional Standard Wording; and Guidance Notes; 4. Agenda for the TWP Session 5. Feedback from participants

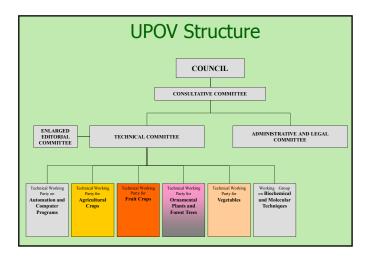
### 1. INTRODUCTION TO UPOV AND THE ROLE OF UPOV TECHNICAL WORKING PARTIES (TWPS)

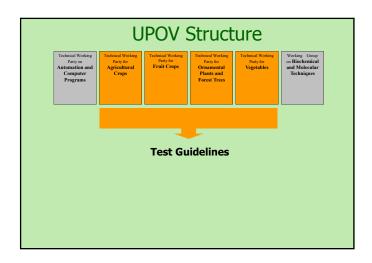
### UPOV: INDEPENDENT INTERGOVERNMENTAL ORGANIZATION

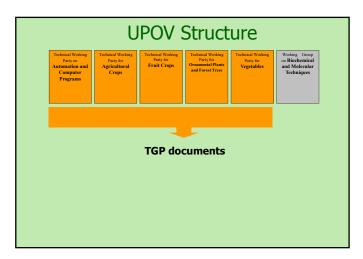
The International Convention for the Protection of New Varieties of Plants established in 1961 The International Union for the Protection of New Varieties of Plants

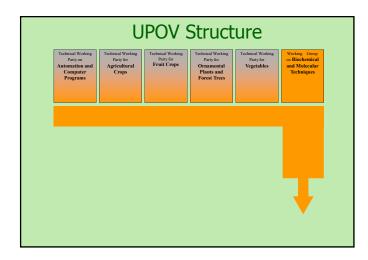
> Union internationale pour la protection des obtentions végétales

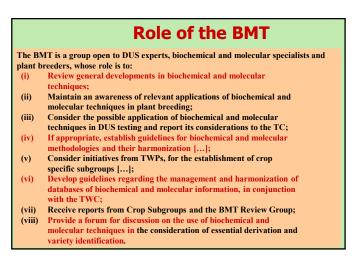












### 2. OVERVIEW OF THE GENERAL INTRODUCTION (document TG/1/3 and TGP documents)

a) Characteristics as the Basis for DUS Examination

**b) Selection of Characteristics** 

2. OVERVIEW OF THE GENERAL INTRODUCTION (document TG/1/3 and TGP documents)

a) Characteristics as the Basis for DUS Examination

**b)** Selection of Characteristics



### THE CONDITIONS FOR **GRANTING A BREEDER'S RIGHT**

Other conditions

- VARIETY DENOMINATION
- FORMALITIES
- PAYMENT OF FEES

**NO OTHER CONDITIONS!** 

### **Guidance for DUS Examination**

### facilitates:

- BEST PRACTICE (based on experience)
  - => good decisions
  - => good definition of the object of protection (strong protection)
  - => efficiency in method of examination (learn from the best)

### HARMONIZATION

### => efficiency

- mutual acceptance of DUS reports
- (minimize cost of examination for individual authorities)
- mutual recognition of variety descriptions
- (all parties speak the same "language")
- simple and cheap system for applicants
- (minimize cost for breeders)

# **UPOV** provides guidance by:

- The "General Introduction" (TG/1/3)
  - General technical principles
  - Organization of DUS Testing
  - Associated "TGP" Documents (e.g. statistical methods)

	TG/1/3 General Introduction
	Ļ
	"Associated" TGP Documents
Ref.	Title
TG/00	List of TGP Documents and Latest Issue Dates
TGP/1	General Introduction With Explanations
TGP/2	List of Test Guidelines Adopted by UPOV
TGP/3	Varieties of Common Knowledge
TGP/4	Constitution and Maintenance of Variety Collections
TGP/5	Experience and Cooperation in DUS testing
TGP/6	Arrangements for DUS testing
TGP/7	Development of Test Guidelines
TGP/8	Trial Design and Techniques Used in the Examination of DUS
TGP/9	Examining Distinctness
TGP/10	Examining Uniformity
TGP/11	Examining Stability
TGP/12	Special Characteristics
TGP/13	Guidance for New Types and Species
TGP/14	Glossary of Technical, Botanical and Statistical Terms Used in UPOV Documents
TGP/15	Guidance on the Use of Biochemical and Molecular Markers in the Examination of Distinctness, Uniformity and Stability (DUS)

### **2.** OVERVIEW OF THE GENERAL **INTRODUCTION** (document TG/1/3 and TGP documents)

a) Characteristics as the Basis for DUS Examination

### **b) Selection of Characteristics**

= version 3

### "CHARACTERISTICS"

- may have direct commercial relevance
  - Flower color (ornamental)
  - Fruit color
- but commercial relevance NOT required
  - Leaf shape

# **Selection of Characteristics**

The basic requirements that a characteristic should fulfill before it is used for DUS testing or producing a variety description are that its expression (TG/1/3: Section 4.2.1) :

- (a) results from a given genotype or combination of genotypes;(b) is sufficiently consistent and repeatable in a particular
- environment;(c) exhibits sufficient variation between varieties to be able to
- establish distinctness;
- (d) is capable of  $\ensuremath{\mbox{precise}}$  definition and recognition;
- (e) allows **uniformity requirements** to be fulfilled;

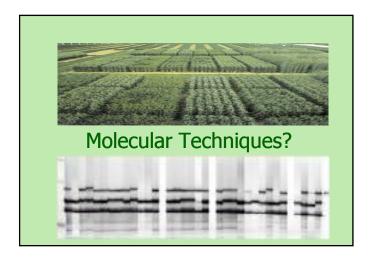
(f) allows **stability requirements** to be fulfilled, meaning that it produces consistent and repeatable results after repeated propagation or, where appropriate, at the end of each cycle of propagation.

Selec	tion of Characteristics
• Yield ?	??
• Straw	strength ???
Etc.	

Selection of Characte	eristic	s	
Criteria	Fruit: color	Leaf: shape	Yield
(a) results from a given genotype or combination of genotypes	Yes	Yes	
(b) sufficiently consistent and repeatable in a particular environment	Yes	Yes	
(c) exhibits sufficient variation between varieties to be able to establish distinctness	Yes	Yes	
(d) is capable of precise definition and recognition	Yes	Yes	
(e) allows uniformity requirements to be fulfilled	Yes	Yes	
(f) allows stability requirements to be fulfilled	Yes	Yes	
Commercial value	Yes	No	
ACCEPTABILITY	Yes	Yes	

Selection of Characte	eristic	s	
Criteria	Fruit: color	Leaf: shape	Yield
<ul> <li>(a) results from a given genotype or combination of genotypes</li> </ul>	Yes	Yes	Yes
(b) sufficiently consistent and repeatable in a particular environment	Yes	Yes	(No)
(c) exhibits sufficient variation between varieties to be able to establish distinctness	Yes	Yes	???
(d) is capable of precise definition and recognition	Yes	Yes	(No)
(e) allows uniformity requirements to be fulfilled	Yes	Yes	???
(f) allows stability requirements to be fulfilled	Yes	Yes	???
Commercial value	Yes	No	Yes
ACCEPTABILITY	Yes	Yes	No

Criteria	Disease Resistance
<ul> <li>(a) results from a given genotype or combination of genotypes</li> </ul>	*Knowledge of nature of genetic control of resistance is important
(b) sufficiently consistent and repeatable in a particular environment	*Standardize conditions (greenhouse / laboratory) & methodology *Standardize inoculum *Ring-test
(c) exhibits sufficient variation between varieties to be able to establish distinctness	*Susceptible / Resistant OR varying degrees of resistance?
(d) is capable of precise definition and recognition	*Define and recognize races and strains
(e) allows uniformity requirements to be fulfilled	see above
(f) allows stability requirements to be fulfilled	see above
	Difficult and expensive



TGP/7 :"Development of Test Guidelines"

Additional Information and guidance on Asterisked, grouping and TQ characteristics

	ndard es Characteristic
Function	Criteria
1.Characteristics that are accepted by UPOV for examination of DUS and from which members of the Union can select those suitable for their particular circumstances.	<ol> <li>Must satisfy the criteria for use of any characteristic for DUS as set out in Chapter 4, section 4.2.</li> <li>Must have been used to develop a variety description by at least one member of the Union.</li> <li>Where there is a long list of such characteristics and, where considered appropriate, there may be an indication of the extent of use of each characteristic.</li> </ol>

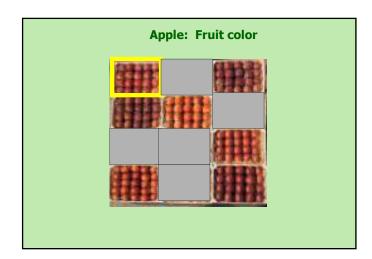
# Asterisked Characteristic

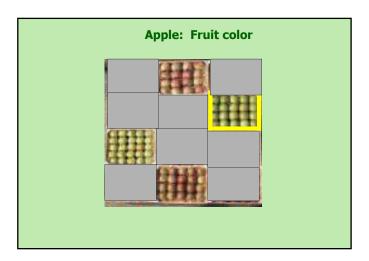
7. <u>Table of Characteristics/Tableau des caractères/Merkmalstabelle/Tabla de caracteres</u>

Char. No.	English	français	Deutsch	español	Example Varieties Exemples Beispielssorten Variedades ejemplo	Note Nota
٢	Plant: growth habit	Plante : port	Pflanze: Wuchsform	Planta: porte		
QN	upright	dressé	aufrecht	erecto	Inuppink	1
	semi-upright	semi dressé	halbaufrecht	semierecto	D0158-1	2
	spreading	étalé	breitwüchsig	abierto	Sumnem 03	3
	semi-trailing	semi-étalé	halbhängend	semirrastrero	Inupsaf	4
	trailing	coureux	hängend	rastrero	Organza	5

Function         Criteria           1.Characteristics that are important for the international harmonization of variety descriptions.         1.Must be a characteristic included in the Test Guidelines.           2.Should always be examined for DUS and included in the variety description by all members of the Union         2.Should always be examined for DUS and included in the variety description by all members of the Union           EXCEPT when the state of expression of a preceding characteristic or regional environmental conditions render this inappropriate.         3.Must be useful for function 1.           4.Particular care should be taken before selection of disease resistance         1.4.Particular care should be taken before selection of disease resistance	Asteriske	ed Characteristic
for the international harmonization of variety descriptions.	Function	Criteria
cnaracterístics.	for the international harmonization of variety	Test Guidelines. 2. Should always be examined for DUS and included in the variety description by all members of the Union EXCEPT when the state of expression of a preceding characteristic or regional environmental conditions render this inappropriate. 3. Must be useful for function 1. 4. Particular care should be taken before

# Sector Description of Varieties and Organization of the Growing Tail A compine of Varieties and Organization of the Growing Tail A compine of Varieties and Common knowledge to be grown in the trial with the characteristics: A compine of Varieties and characteristics are three of growing characteristics: A compine characteristics care three of growing characteristics: A compine characteristics: A compine characteristic: A compine the trial with the characteristic are three of common knowledge that can be excluded from the growing trial used for examination of disfutnesses and (b) to organize the growing trial used for examination of disfutnesses. A compine the trial are trial are growed to examination of disfutnesses. A compine the trial component of the compine the arcteristic: A compine the trial component of the compine the arcteristic are three of the component of the trial with the set of the component of the companize the growing trial used for examination of disfutnesses. A compine the trial with the characteristic: A compine the trial with the distance of component howledge that can be excluded from the trial with the trial

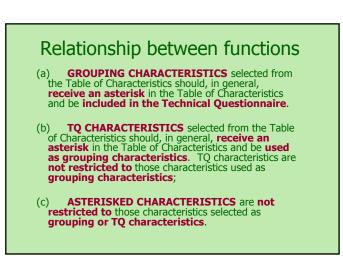




10.	Technical Questionna	iire		
TECI	HNICAL QUESTION	NAIRE	Page {x} of {y}	Reference Number:
				Application date: (not to be filled in by the application)
	to be completed i		INICAL QUESTION	NAIRE on for plant breeders' rights
1.	Subject of the Techn	tical Que	estionnaire	
1.1	Botanical name	M	alus domestica Borkh	
1.2	Common name	AĮ	ople	
2.	Applicant			
	Name			
	Address			
	Telephone No.			

TEC	CHNICAL QUESTIONNAIRE	Page {x} of {y}	Reference Number:	
5. con	Characteristics of the variety responding characteristic in Test G			
	Characteristics		Example Varieties	Note
5.5 (37)	Fruit: hue of over color – with bloom	removed		
	orange red		Cox's Orange Pippin, Egremont Russet	1[]
	pink red		Cripps Pink, Delorgue	2[]
	red		Akane, Galaxy, Red Elstar, Regal Prince	3[]
	purple red		Red Jonaprince, Spartan	4[]
	brown red		Fiesta, Joburn, Lord Burghley	5[]
5.6 (39)	Fruit: pattern of over color			
	only solid flush		Red Jonaprince, Richared Delicious	1[]
	solid flush with weakly defined stripes		Galaxy	2[]
	solid flush with strongly defined stripes		Jonagored	3[]
	weakly defined flush with strongly defin	ned stripes	Gravensteiner	4[]
	only stripes (no flush)		Helios	5[]
	flushed and mottled		Elstar	6[]
	flushed, striped and mottled		Jonagold	7[]

ereapi	ng Characteristic
Function	Criteria
<ul> <li>characteristics in which the documented states of expression, even where recorded at different locations, can be used either individually or in combination with other such characteristics:</li> <li>to select varieties of common knowledge that can be excluded from the growing trial used for examination of distinctness, and/or</li> <li>to organize the growing trial so that similar varieties are grouped together</li> </ul>	<ol> <li>Qualitative characteristics or (b) Quantitative or pseudo-qualitative characteristics which provide useful discrimination between the varieties of common knowledge from documented states of expression recorded at different locations.</li> <li>Must be useful for functions 1 and 2.</li> <li>Should be an asterisked characteristic and/or included in the Technical Questionnaire or application form.</li> </ol>



# 3. GUIDANCE ON DRAFTING TEST GUIDELINES (Document TGP/7)

# 3. GUIDANCE ON **DRAFTING TEST GUIDELINES**

a) Subject of the Test Guidelines, Material **Required and Method of Examination** 

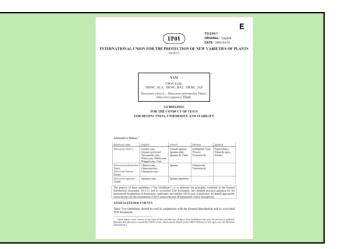
### **UPOV** provides guidance by:

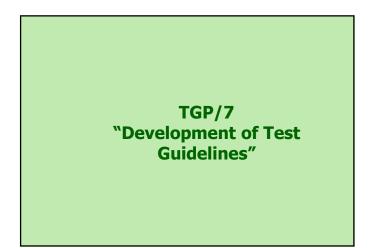
- The "General Introduction" (TG/1/3)
  - General technical principles
  - Organization of DUS Testing
  - Associated "TGP" Documents
    - (e.g. statistical methods)

AND

### "Test Guidelines"

- Species/Crop-specific recommendations developed
- by crop experts
- TGP/7 "Development of Test Guidelines" adopted





# TGP/7 :"Development of Test Guidelines"

### **Section 1. Introduction**

### TGP/7/3.... Section 1: Int page 6 SECTION 1: INTRODUCTION

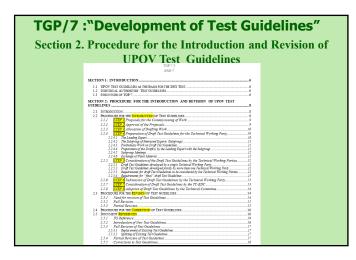
### 1.1 UPOV Test Guidelines as the Basis for the DUS Test

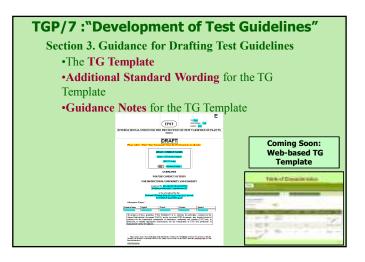
The General Introduction (Chapter 2, section 2.2.1) states that "Where UPOV has estiblished specific Test Guidelines for a particular species, or other group(s) of varietes, esterished specific Test Guidelines for a particular species, or other group(s) of varietes, is comparitoria with the share gategoing contained in the General Introduction, Smell Fram Bernard et al. 2015 test." In further states in Chapter 3, section 3.2.1, that "The individual Test Guidelines are prepared or where supporting trevised according to the procedures set out in document TGP7. Development of Test Guidelines". Thus, the purpose of this document is to growide guidance on the development of these UPOV Test Guidelines".

### Individual Authorities' Test Guidelines

The General Instructions due states that "Where UPOV has not established individual Test Guiddines relevant to the variety to be examined, the examination should be carried out in accordance with the primaripies in this document [bc] General Introductional and, in particular, the recommendations comined in Chapter 9, Cendence of DUS Testing in the Absence of Test Guiddines. In particular, the recommendations in Chapter 9 are based on the approach whereby, in the absence of Test Guiddines, the DUS examine proceeds in the same formal ways at 18 developing new Test Guiddines. The State on a "Development of Individual authorities' test guiddines" provides guidance on the development of individual authorities' test guiddines.

### 1.3 Structure of TGP/7





### 10 Chapters of UPOV Test Guidelines

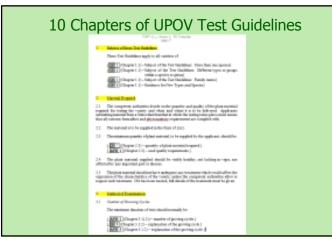
- 1. Subject of the Test Guidelines
- 2. Material Required
- 3. Methods of Examination
- 4. Assessment of Distinctness, Uniformity and Stability
- 5. Grouping of Varieties and Organization of the Growing Trial
- 6. Introduction to the Table of Characteristics

### 7. Table of Characteristics

- 8. Explanation on the Table of Characteristics
- 9. Literature
- 10. Technical Questionnaire

### 10 Chapters of UPOV Test Guidelines

- 1. Subject of the Test Guidelines
- 2. Material Required
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- 4. Assessment of Distinctness, Uniformity and Stability
- 5. Grouping of Varieties and Organization of the Growing Trial
- 6. Introduction to the Table of Characteristics
- 7. Table of Characteristics
- 8. Explanation on the Table of Characteristics
- 9. Literature
- 10. Technical Questionnaire





b) Method of observation (MS, MG, VS, VG)

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		and the second	-	sales!	territer.	Trend	
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### Method of Observation

### M: Measurement:

an objective observation against a calibrated, linear scale e.g. using a ruler, weighing scales, colorimeter, dates, counts, etc.);

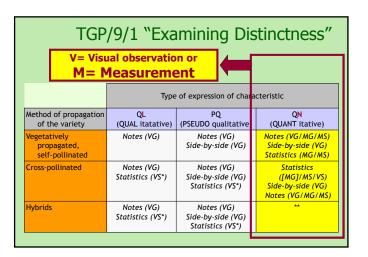
### V: Visual observation:

includes observations where the expert uses reference points (e.g. diagrams, example varieties, side-by-side comparison) or non-linear charts (e.g. color charts).

"Visual" observation refers to the sensory observations of the expert and, therefore, also includes smell, taste and touch.

TGP	/9/1 "Exar	mining Dist	inctness"
	Туре о	f expression of charact	eristic
Method of propagation of the variety	QL (QUAL itatative)	PQ (PSEUDO qualitative)	Q <mark>N</mark> (QUANT itative)
Vegetatively propagated, self-pollinated	Notes (VG)	Notes (VG) Side-by-side (VG)	Notes (VG/MG/MS) Side-by-side (VG) Statistics (MG/MS)
Cross-pollinated	Notes (VG) Statistics (VS*)	Notes (VG) Side-by-side (VG) Statistics (VS*)	Statistics ([MG]/MS/VS) Side-by-side (VG) Notes (VG/MG/MS)
Hybrids	Notes (VG) Statistics (VS*)	Notes (VG) Side-by-side (VG) Statistics (VS*)	**
		Statistics (VS )	

TGF	9/9/1 "Exar	mining Dist	inctness"
	V= Visual o	observation	
	Туре о	of expression of characte	ristic
Method of propagation of the variety	QL (QUAL itatative)	PQ (PSEUDO qualitative)	QN (QUANT itative)
Vegetatively propagated, Self-pollinated	Notes (VG)	Notes (VG) Side-by-side (VG)	Notes (VG/MG/MS) Side-by-side (VG) Statistics (MG/MS)
Cross-pollinated	Notes (VG) Statistics (VS*)	Notes (VG) Side-by-side (VG) Statistics (VS*)	Statistics ([MG]/MS/VS) Side-by-side (VG) Notes (VG/MG/MS)
Hybrids	Notes (VG) Statistics (VS*)	Notes (VG) Side-by-side (VG) Statistics (VS*)	**

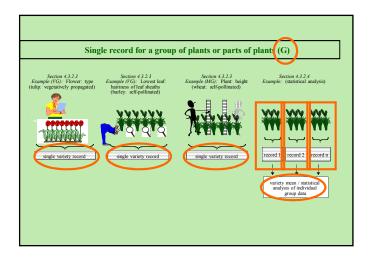


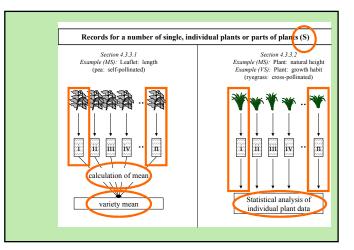
### Type of Record (for the purposes of distinctness)

# **<u>G</u>:** single record for a variety, or a **GROUP of plants** or parts of plants;

In most cases, "G" provides a single record per variety and it is not possible or necessary to apply statistical methods in a plant-by-plant analysis for the assessment of distinctness.

S: records for a number of SINGLE, individual plants or parts of plants ...







3. GUIDANCE ON DRAFTING TEST GUIDELINES

c) Types of Expression (QL, PQ, QN), notes and distinctness;

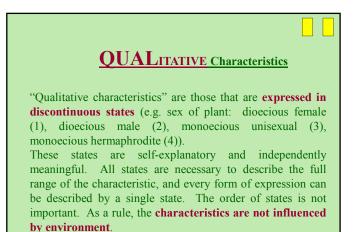
TYPE OF EXPRESSION OF CHARACTERISTICS (QL, QN, PQ) **Types of Expression** 

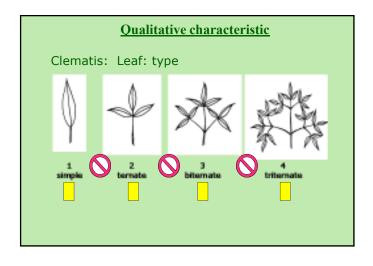
QL: QUALITATIVE

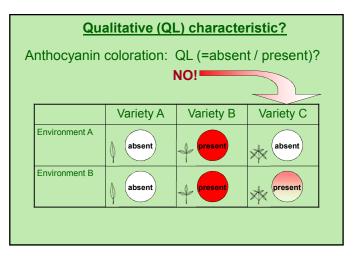
QN: QUANTITATIVE

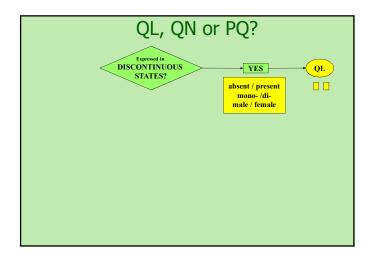
PQ: PSEUDO-QUALITATIVE

	Table of Characte	ristics/Tableau de	es caractères/Merkma	alstabelle/Tabla c	le caracteres	
Char. No.	English	français	Deutsch	español	Example Varieties Exemples Beispielssorten Variedades ejemplo	Not No
1. (*) (+)	Plant: growth habit	Plante : port	Pflanze: Wuchsform	Planta: porte		
(N)	upright	dressé	aufrecht	erecto	Inuppink	1
$\bigcirc$	semi-upright	semi dressé	halbaufrecht	semierecto	D0158-1	2
	spreading	étalé	breitwüchsig	abierto	Sumnem 03	3
	semi-trailing	semi-étalé	halbhängend	semirrastrero	Inupsaf	4
	trailing	coureux	hängend	rastrero	Organza	5
2.	Plant: height	Plante : hauteur	Pflanze: Höhe	Planta: altura		
(+)						
QN	short	basse	niedrig	baja	Yateye	3
	medium	moyenne	mittel	media	D0158-1	5
	tall	haute	hoch	alta	Inuppink	7



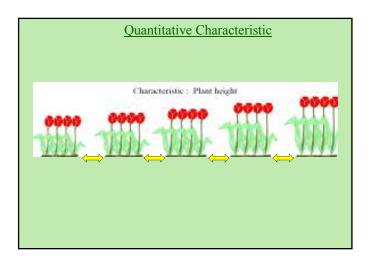


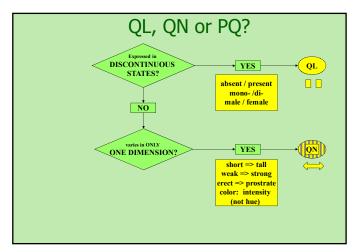






"Quantitative characteristics" are those where the expression covers the full range of variation from one extreme to the other. The **expression can be recorded on a one-dimensional**, **continuous or discrete, linear scale**. The range of expression is divided into a number of states for the purpose of description (e.g. length of stem: very short (1), short (3), medium (5), long (7), very long (9)). The division seeks to provide, as far as is practical, an even distribution across the scale. The Test Guidelines do not specify the difference needed for distinctness. The states of expression should, however, be meaningful for DUS assessment.

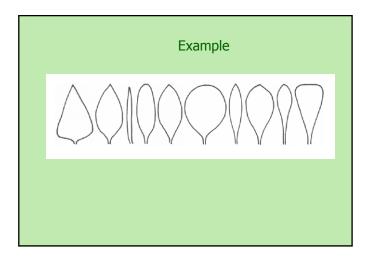


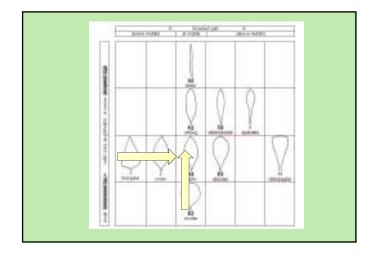


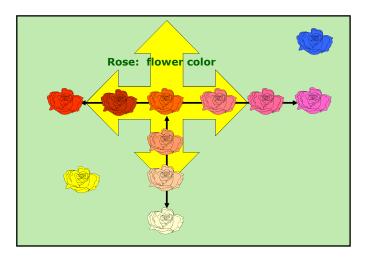
# **PSEUDO-QUALITATIVE** Characteristics

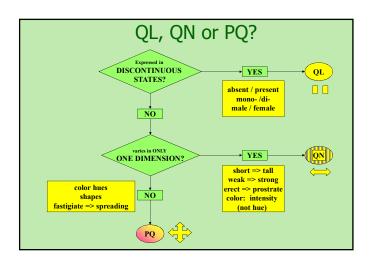
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In the case of "pseudo-qualitative characteristics," the **range of expression is at least partly continuous, but varies in more than one dimension** (e.g. shape: ovate (1), elliptic (2), circular (3), obovate (4)) and cannot be adequately described by just defining two ends of a linear range. In a similar way to qualitative (discontinuous) characteristics – hence the term "pseudo-qualitative" – each individual state of expression needs to be identified to adequately describe the range of the characteristic.











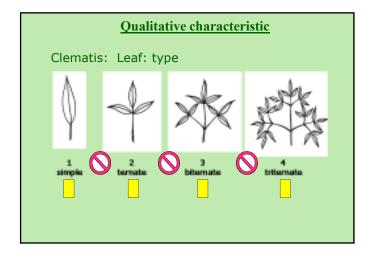
NOTES and DISTINCTNESS according to TYPE OF EXPRESSION (QL, PQ, QN)

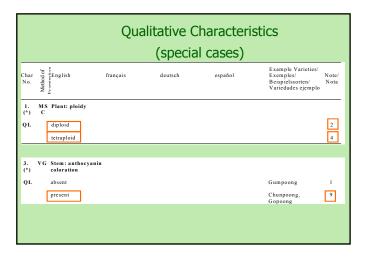
# Types of Expression

**QL: QUALITATIVE** 

**QN: QUANTITATIVE** 

**PQ: PSEUDO-QUALITATIVE** 





### **Qualitative** Characteristics: **distinctness**

In qualitative characteristics, the difference between two varieties may be considered clear if one or more characteristics have expressions that fall into **two different states in the Test Guidelines**. Varieties should not be considered distinct for a qualitative characteristic if they have the same state of expression.

(e.g. sex of plant: dioecious female (1), dioecious male (2), monoecious unisexual (3), monoecious hermaphrodite (4)).

# **Types of Expression**

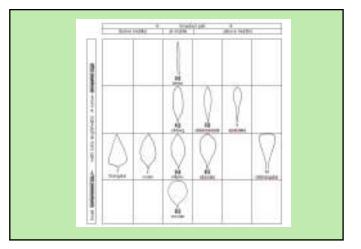
QL: QUALITATIVE

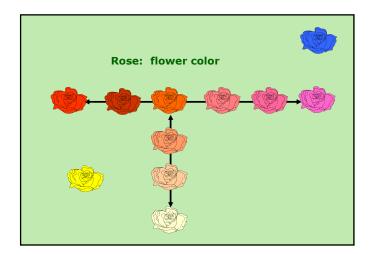
QN: QUANTITATIVE

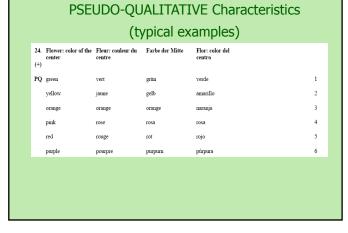
**PQ: PSEUDO-QUALITATIVE** 

### **PSEUDO-QUALITATIVE** Characteristics

In the case of "pseudo-qualitative characteristics," the **range of expression is at least partly continuous, but varies in more than one dimension** (e.g. shape: ovate (1), elliptic (2), circular (3), obovate (4)) and cannot be adequately described by just defining two ends of a linear range. In a similar way to qualitative (discontinuous) characteristics – hence the term "pseudo-qualitative" – each individual state of expression needs to be identified to adequately describe the range of the characteristic.

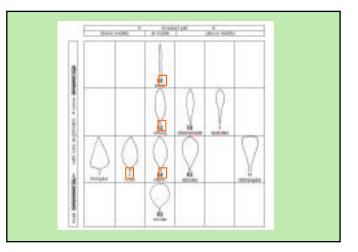


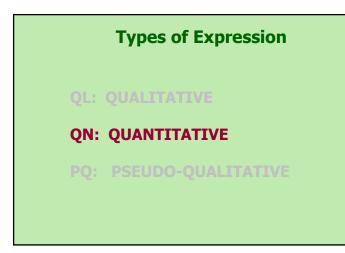




### Pseudo-Qualitative Characteristics: distinctness

A different state in the Test Guidelines may not be sufficient to establish distinctness (see also section 5.5.2.3). However, in certain circumstances, varieties described by the same state of expression may be clearly distinguishable.



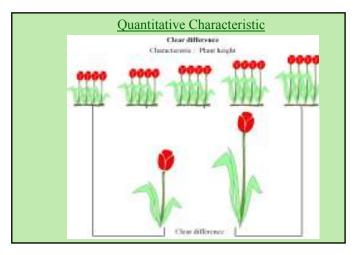


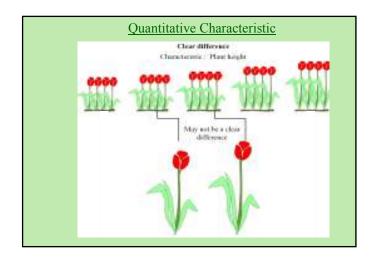
# **QUANTITATIVE** Characteristics

"Quantitative characteristics" are those where the expression covers the full range of variation from one extreme to the other. The **expression can be recorded on a one-dimensional, continuous or discrete, linear scale**. The range of expression is divided into a number of states for the purpose of description (e.g. length of stem: very short (1), short (3), medium (5), long (7), very long (9)). The division seeks to provide, as far as is practical, an even distribution across the scale. The Test Guidelines do not specify the difference needed for distinctness. The states of expression should, however, be meaningful for DUS assessment.

### Quantitative Characteristics: distinctness

Quantitative characteristics are considered for distinctness according to the method of observation and the features of propagation of the variety concerned...



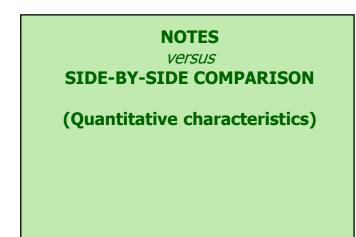


	weak/stro short/long small/larg	g	
Note	State	Note	State
1	very weak (or: absent or very weak)	1	very small (or: absent or very small)
2	very weak to weak	2	very small to small
3	weak	3	small
4	weak to medium	4	small to medium
5	medium	5	medium
6	medium to strong	6	medium to large
7	strong	7	large
8	strong to very strong	8	large to very large
9	very strong	9	very large

Quantitative Characteristics (1-9)

State	Example 1 Size relative to:	Example 2 Angle:	Example 3 Position:	Example 4 Length in relation to:
1	much smaller	very acute	at base	equal
3	moderately smaller	moderately acute	one quarter from base	slightly shorter
5	same size	right angle	in middle	moderately shorter
7	moderately larger	moderately obtuse	one quarter from apex end	much shorter
9	much larger	very obtuse	at apex	very much shorter

C	-	titative Characteri (at least 3 notes)	stics
	Example 2	2	
	2 mode 2 (mode 3 strong	bsent or weak nt or weakly expressed) rate (or medium) erately expressed) gly expressed)	
5	State	Example 1	
		Stem: attitude	
	1	erect	
	3	semi-erect	
4	5	prostrate	
		·]	



# TGP/9/1 "Examining Distinctness"

### 5.2 Approaches for assessing distinctness

5.2.1 Introduction

5.2.1.1 Approaches for assessment of distinctness based on the growing trial can be summarized as follows:

(a) Side-by-side visual comparison in the growing trial

(see Section 5.2.2);

- (b) Assessment by Notes / single variety records ("Notes"): the assessment of distinctness is based on the recorded state of expression of the characteristics of the variety (see Section 5.2.3):
- (c) Statistical analysis of growing trial data:

### Quantitative Characteristics: distinctness

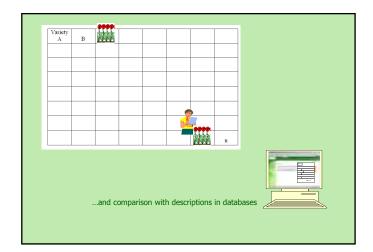
The General Introduction explains that, in the case of visually observed quantitative characteristics:

"5.5.2.2.2 A direct comparison between two similar varieties is always recommended, since direct pairwise comparisons are the most reliable. In each comparison, a difference between two varieties is acceptable as soon as it can be assessed visually and could be measured, although such measurement might be impractical or require unreasonable effort."

# TGP/9/1 "Examining Distinctness"

5.2.3.1.2 Where the requirements for distinctness assessment by Notes / single variety records are met it would usually also be possible to make a side-by-side visual comparison. However, in the case of assessment by Notes / single variety records, such proximity is not required, which is a particular advantage where the growing trial contains a large number of varieties and where there are limited possibilities for ensuring that all similar varieties are grouped together in the growing trial. ...

On the other hand, because the varieties are not the subject of a side-by-side visual comparison, the difference required between varieties as a basis for distinctness is, with the exception of qualitative characteristics (see below), somewhat greater.



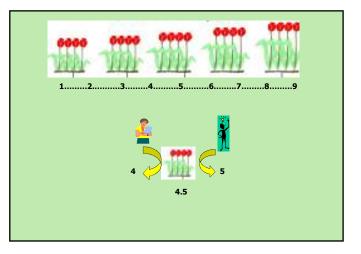
### Quantitative Characteristics: distinctness

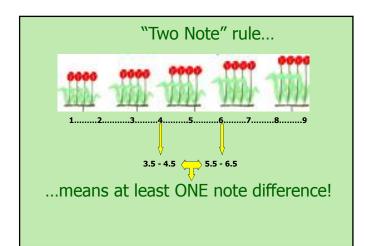
Quantitative characteristics are considered for distinctness according to the method of observation and the features of propagation of the variety concerned.

Test Guidelines (TGP/7 proposed revised text)

Difference of **two Notes to represent a clear difference if** the **comparison** between two varieties is performed **at the level of Notes**:

WHY?



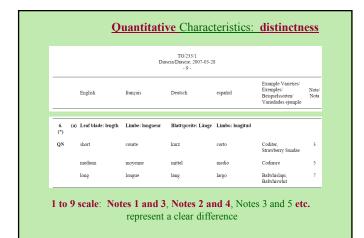


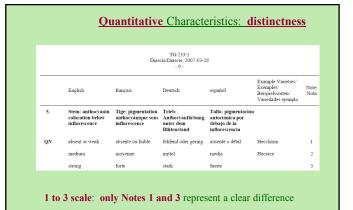
### Quantitative Characteristics: distinctness

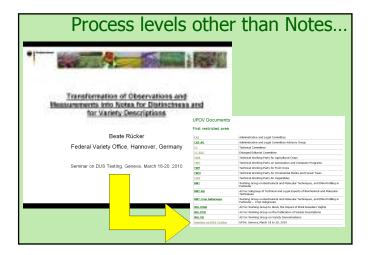
Quantitative characteristics are considered for distinctness according to the method of observation and the features of propagation of the variety concerned.

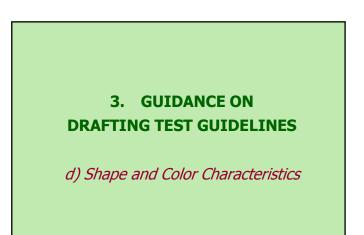
Test Guidelines (TGP/7 proposed revised text)

Difference of **two Notes to represent a clear difference if** the **comparison** between two varieties is performed **at the level of Notes**:









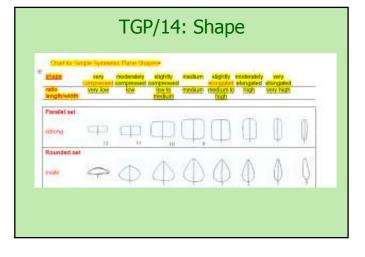
# TGP/14: Shape

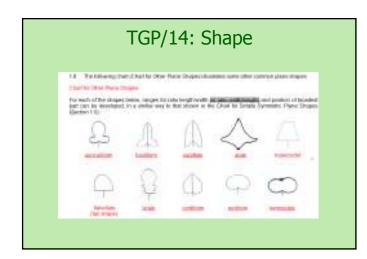
Characteristics related to shape, could use the following components:

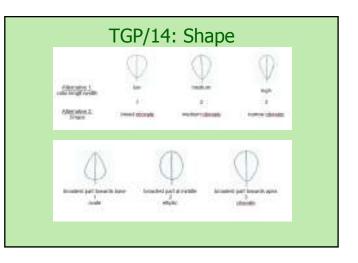
•Shape: e.g. ovate (1), elliptic (2), circular (3), obovate (4)...

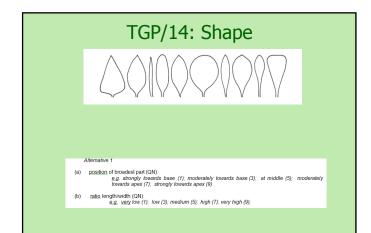
•Ratio length/ width (from low to high)

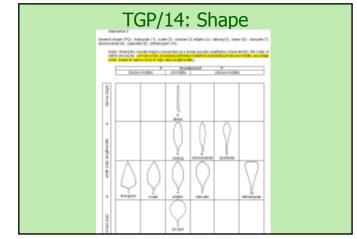
- Postion of broadest part
- •Shape of base
- •Shape of apex
- Lateral outline

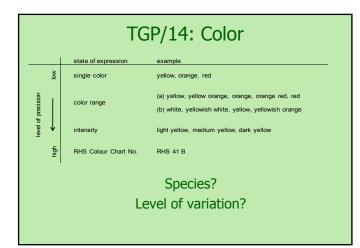












# TGP/14: Color

Single color

- A single color has the lowest precision to describe the state of expression.
- Example: Flower: color: white (1); yellow (2); orange (3); red (4)

# TGP/14: Color Color range

- (a) In color combinations the second color indicates the predominant color with blending of both colors, resulting in what can look like a single color. For example in "green red" the predominant color is red and in "red green" the predominant color is green.
- Example: Flower: color: white (1); yellow white (2); yellow (3); yellow orange (4); orange (5)
- (b) The use of "ish" in color combinations indicates that there is a predominant color (e.g. yellow) together with another minor color. For example,
- yellowish, covers all colors which are predominantly yellow (would include, for example, white yellow; brown yellow; orange yellow; etc.)
- yellowish green covers all colors which are predominantly green with some yellow (would include, for example, white yellow green; brown yellow green; orange yellow green etc.)
- Example: Flower: color: whitish (1); yellowish (2); greenish (3)

# TGP/14: Color

# Intensity

- Depending on the organ described, the intensity can be presented either in relation to a single color or in combination with different colors (example 2).
- Example 1: Leaf: green color of upper side: light (3); medium (5); dark (9)
- Example 2: Flower: color: white (1); light yellow (2); medium yellow (3); dark yellow (4); orange (5)

# TGP/14: Color Color Chart

- The "RHS Colour Chart" because of its worldwide availability.
  5 editions of this color chart, dating from 1966, 1986, 1995, 2001 and 2007.
  Reference number of the RHS color, color name and edition of the chart to be mentioned.
  UPON names for colors in ANNEX.
  Other color charts might also be appropriate.

- "Because daylight varies, color determinations made against a color chart should be made either in a suitable cabinet providing artificial daylight or in the middle of the day in a room without direct sunlight. The spectral distribution of the illuminant for artificial daylight should conform with the CIE Standard of Preferred Daylight D 6500 and should fall within the tolerances set out in the British Standard 950, Part I. These determinations should be made with the plant part placed against a white background".
- Observations should not be made in direct sunlight. The observations should be made on a cloudy day with sufficient light intensity, or in a shaded area.

### Allocation of UPOV Color Groups for each RHS Color in RHS Reference order RHS COLORS (RHS COLOUR CHART, EDITIONS 1986, 1995, 2001 AND 2007) BY UPOV COLOR GROUPS

UPOV roup No.	No. RHS	English	français	deutsch	español
11	001A	yellow	jaune	gelb	amarillo
5	001B	yellow green	vert-jaune	gelbgrün	verde amarillento
5	001C	yellow green	vert-jaune	gelbgrün	verde amarillento
5	001D	yellow green	vert-jaune	gelbgrün	verde amarillento
11	002A	yellow	jaune	gelb	amarillo
11	002B	vellow	jaune	gelb	amarillo
5	002C	yellow green	vert-jaune	gelbgrün	verde amarillento
5	002D	yellow green	vert-jaune	gelbgrün	verde amarillento
11	003A	yellow	jaune	gelb	amarillo
11	003B	vellow	jaune	gelb	amarillo
11	003C	vellow	jaune	gelb	amarillo
5	003D	yellow green	vert-jaune	gelbgrün	verde amarillento
11	004A	vellow	jaune	gelb	amarillo
11	004B	vellow	jaune	gelb	amarillo
5	004C	yellow green	vert-jaune	gelbgrün	verde amarillento
10	004D	lightyellow	jaune clair	heligelb	amarillo claro
11	005A	vellow	jaune	gelb	amarillo
11	005B	yellow	jaune	gelb	amarillo
11	005C	yellow	jaune	gelb	amarillo
10	005D	lightyellow	jaune clair	heligelb	amarillo claro
11	006A	yellow	jaune	gelb	amarillo
11	006B	yellow	jaune	gelb	amarillo
11	006C	vellow	jaune	gelb	amarillo
10	006D	lightyellow	jaune clair	heligelb	amarillo claro
11	007A	vellow	jaune	gelb	amarillo
11	007B	yellow	jaune	gelb	amarillo
11	007C	yellow	jaune	gelb	amarillo
11	007D	vellow	jaune	gelb	amarillo

# TGP/14: Color

Order of states of expression

- normally presented in the following order: white, green, yellow, orange, pink, red, purple, violet, blue, brown, black
- chronological appearance of the color (e.g. as the fruit ripens)

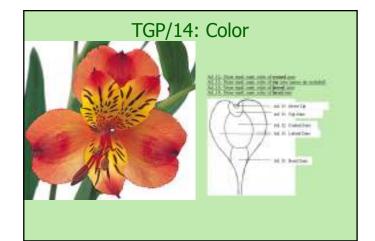
# TGP/14: Color APPROACHES TO DESCRIBE COLORS AND COLOR PATTERNS

- depends on the number of colors...
- the types of color distribution...
- and the number of color patterns possible for the species concerned.

# TGP/14: Color

Approach according to the size of the surface area

- (a) only a few colors, a few types of color distribution and a few patterns to be described,
- the colors are described according to the size of the surface area they cover



# TGP/14: Color Approach according to tissue layers

- one layer is covering the other:
- (a) Ground color (not always the largest surface area):
  - (i) the first color to appear chronologically.
  - (ii) has a continuous dispersion across the surface.
- (b) Over color (not always occupying the smallest surface area):
  - a second color, such as a flush, spots or blotches developed over time.

35. (*)		Fruit: ground color		37. (*)		Fruit: hue of over color – with bloom removed	
PQ	(f)	not visible	1	PQ	(f)	orange red	1
		whitish yellow	2			pink red	2
		yellow	3			red	3
		whitish green	4			purple red	4
		yellow green	5			brown red	5
		green	6				



# TGP/14: Color

### Approach according to defined parts of an organ

- (a) If the different parts of a plant organ can have different colors, the color of these different parts can be described separately.
- Example:
  - Petal: color of marginPetal: color of middle zone

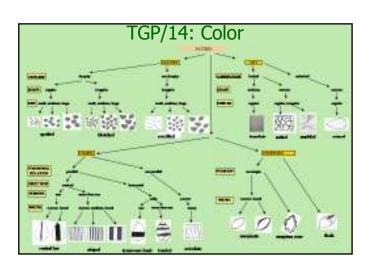
  - Petal: color of base
- (b) When an organ has one color with different intensities, the parts of the organ which are lighter or darker could be described as follows: ٠
- Example: • Ray floret: color distribution on upper side: • lighter towards base (1); even (2); lighter towards apex (3)



### Approach according to the RHS Colour Chart number ("Lisbon" approach)

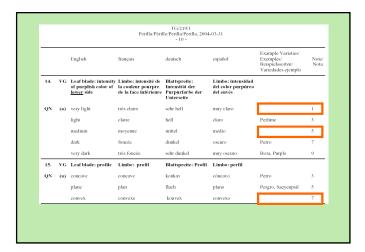
- All colors of the plant part concerned are assessed using the RHS Colour Charts first.
- The color should first be described, followed by: – area,
  - distribution,
  - Pattern
  - conspicuousness of the color (if necessary).
- The same sequence should be followed for color two, color three and so on. I

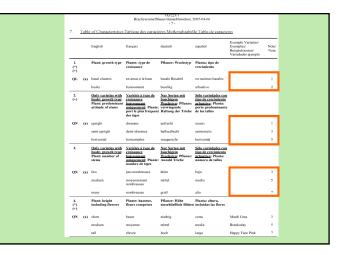


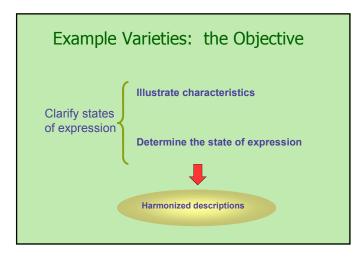


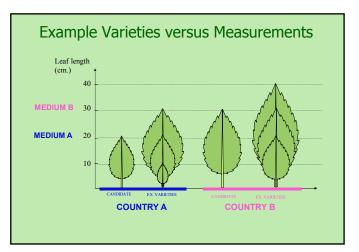
3. GUIDANCE ON DRAFTING TEST GUIDELINES	
e) Example Varieties	

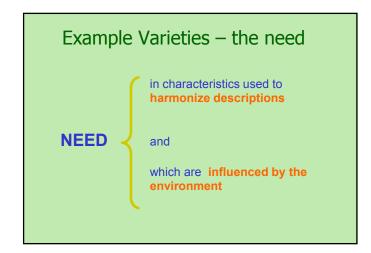
		Lettuce	/Laitue/Salat/Lechuga - 7 -	, 2004-03-31		
7. <u>T</u>	able of Characteris	tics/Tableau des cara	actères/Merkmalsta	belle/Tabla de can	acteres	
	English	frança is	Deutsch	español	Example Varieties Exemples Beispielssorten Variedades ejemplo	No No
1. (*)	Seed: color	Semence: couleur	Samen: Farbe	Semilla: color		
	white	blanche	weiß	blanco	Verpia	1
	yellow	jaune	gelb	amarillo	Durango	2
	black	noire	schwarz	negro	Kagraner Sommer	3
2. (*) (+)	Seedling: anthocyanin coloration	Plantule: pigmentation anthocyanique	Keimpflanze: Anthocyanfärbung	Plántula: pigmentación antociánica		
	absent	absente	fehlend	ausente	Verpia	1
	present	présente	vorhanden	presente	Pirat	9
3.	Seedling: size of cotyledon (fully developed)	Plantule: taille du cotylédon (à complet développement)	Keimpflanze: Größe des Keimblatts (voll entwickelt)	Plántula: tamaño del cotiledón (plenamente desarrollado)		
	small	petit	klein	pequeño	Romance	3
	medium	moyen	mittel	medio	Expresse	5
	large	grand	groß	grande	Verpia	7

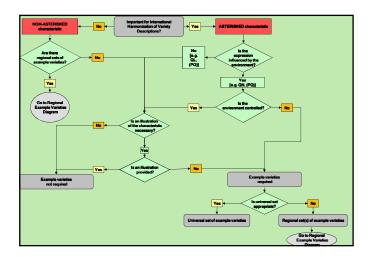












# 3. GUIDANCE ON DRAFTING TEST GUIDELINES

f) The process for developing UPOV Test Guidelines, including: TG Template; Additional Standard Wording; and Guidance Notes;

### **Genera and Species**

- >3,000 genera and species with varieties examined for PBR
- >2,700 genera and species for which UPOV members have practical DUS experience
- 301 Test Guidelines adopted
- Note: **301 Test Guidelines estimated to cover 90% of PBR-related varieties in UPOV Plant Variety Database**

### **PRIORITY for UPOV Test Guidelines**

**PRIORITY** for species or crops with high:

- number of authorities receiving PBR applications;
- number of PBR applications;
- number of foreign applications received by UPOV members;
- economic importance;
- level of breeding activity

### **EXAMPLE (New Test Guidelines)**

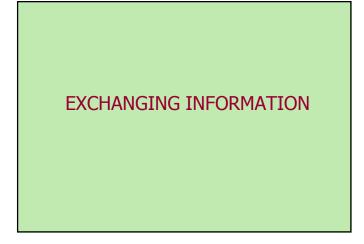
Test Guidelines: *Plantus magnifica* L. (Common name: Alpha)

Technical Working Party: TWX

TWX (2013): TWX (2014): TWX (2015): Enlarged Editorial Committee (2016): Technical Committee (2016): Final adopted document (2016):

Alpha (proj.**1**) Alpha (proj.**2**) Alpha (proj.**3**) Alpha (proj.**4**) Alpha (proj.**5**) **TG/500/1** 

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	Monday, Start	June 23 9.00	Tuesday Star	, June 24 8.30	Wednesd	ay, June 25 t 8.30	Thursday, June 26 Start 8.30	Friday, June 27 Start 9.00
68.30	30 1. <u>Deemins</u> <u>2. Adaption of the seconds</u> (TWVHR1) <u>3. Boot records on developments in <u>4. Boot records on developments and bot events (TWVHR25Prov.)</u> (b) Reports on developments within UPOV(TWVHR24)</u>		120-50countristicont/dl 120-50countristicont/dl TGP/7: Development of Test Guideline Paint naterial automateriol Coverage of the Test Guidelines (TVVV487) Drafter \$cffor Test Guidelines (TVVV487) 12. Lube disease resistance phraset enclose and in US examination (TVVV487)		<u>102 Bockment Loord</u> <u>102 Bockment Loord</u> Used in DUS Examination Variation dujo Ediment Observed Method of Calculation of COYU (TWV48/16) <u>10. Quidancefor datfers of TOs</u> (TWV48/16)		<u>12P3counterkticord</u> <u>12P3counterkticord</u> <u>12P3k</u> : TallOegan al Techniques <u>12P3k</u> : and <u>12P3k</u> : Techniques (TWV4691;)	Endormation and databases (0) UPCV information databases (TVVV466) (CVVV467) (c) Exchangeable software (TVVV467) (c) Exchangeable software (TVV467) (c) Exchangeable software (TVV4667) (c) Exchangeable software (CVV0467) (c) Exchangeable software (CVV0467) (c) Exchangeable software (c) Exchangeable
10.00 BREAK		BREAK		BREAK		BREAK	BREAK	
10.30	(TWV/442) 6. TGP documents (TWV/443) TGP14: Glossary of Terms Used in UPOV Documents Apex (TIp Characteristics (TWV/4422) CSI:email.coverview Photographs Single Aleasurement (MG)		Z. Variety denominators (TWW484)     Lindomity assessment     Off-types (TWW489)     J. Experience with new Tupes and     Species     New proposals for Test. Quidelines		TGs in plenary session (e.g. French bean, sweet pepper, lomato, spinach, cocurber, brassica, shilake)		13. Management of reference collections (TWO-MERZE) 14. Here issues arising for COUS seamnation (TWO-MSG2) 15. Matters to be resolved concerning Test Guidelines adopted to the Technical Committee	20. Date and place of next session 21. Fully encourant 22. Addition of report 23. Closing of the session
12.30			LUNCH		LUNCH		LUNCH	LUNCH
13.30	Basil DE	Bottle Gourd FR	*Cassava KE+BR	Widoof Chicory FR	TGs in plenary session (cont'd)			
15.00			BR	EAK	BREAK			Reserve
15.15	Brown Mustard JP	Cucurbita maxima x Cucurbita moschata FR	"Lentil FR	Lettuce NL	Reserve	Reserve	TECHNICAL VISIT Battipaglia	
16.45	Reserve Reserve		BREAK Reception (official "informat" dinner, group photo ?) Departure 18.20 (rom the botel				]	
17.00					Optional (Paestum)			



Sunday	Monday		Tuesday		Wednesday		Thursday		Friday
	Reports on developments in PVP		TGP document development		TGP document development		Experiences with new types and species Variety denominations		Databases, Electronic application systems Exchangeable software
[TECHNICAL WORKSHOP] (optional)	COFFEE		COFFEE		COFFEE		COFFEE		COFFEE
			TGP document		Room 1	Room 2	Uniformity method		Recommendations on
	Molecular t	development development		t	Test Guidelines subgroup	Test Guidelines subgroup	development		Test Guidelines
	LUNCH		LUNCH		LUNCH		LUNCH		LUNCH
	Room 1	Room 2	Room 1	Room 2			Room 1	Room 2	Future program
PREPARATORY WORKSHOP	Test Guidelines subgroup	Test Guidelines subgroup	Test Guidelines subgroup	Test Guidelines subgroup			Test Guidelines subgroup	Test Guidelines subgroup	Adoption of report
	COFFEE		COFFEE		TECHNICAL VISIT		COFFEE		
	Room 1	Room 2	Room 1	Room 2			Room 1	Room 2	
	Test Guidelines subgroup	Test Guidelines subgroup	Test Guidelines subgroup	Test Guidelines subgroup			Test Guidelines subgroup	Test Guidelines subgroup	END OF SESSION
	Continuation		RECEPTION				Continuation		

			WP Ver	nues		
	TWA	тwc	TWF	TWO	TWV	BMT
1994	Spain	Israel	New Zealand	Australia	United Kingdom	France
1995	Germany	Poland	United Kingdom	Netherlands	Netherlands	Netherlands
1996	Greece	Germany	Israel	Israel	Czech Rep.	
1997	Uruguay	Hungary	Netherlands	Denmark	Spain	United Kingdom
1998	France	Belgium	Australia	New Zealand	Poland	USA
1999	Canada	Finland	Slovakia	Czech Rep.	Germany	
2000	Sweden	Ukraine	Hungary	Hungary	France	France
2001	Mexico	Czech Rep.	Spain	Japan	Italy	Germany
2002	Brazil	Mexico	Argentina	Ecuador	Japan	
2003	Japan	Denmark	Canada	Canada	Netherlands	Japan
2004	Poland	Japan China (workshop)	Germany	Germany	Rep. of Korea	
2005	New Zealand	Canada	Japan	Rep. of Korea	Slovakia	USA
2006	China	Kenya	Brazil	Brazil	Mexico	Rep. of Korea
2007	Hungary	Romania	Rep. of Korea	China	Kenya	
2008	South Africa	Rep. of Korea	Portugal	Netherlands	Poland	Spain
2009	Rep. of Korea	USA	France	European Union	China	
2010	Croatia	European Union	Mexico	Mexico	Bulgaria	Canada
2011	Brazil	Geneva - UPOV	Japan	Japan	USA	Brazil
2012	France	Rep. Moldova	China	Rep. of Korea	Netherlands	

# 5. FEEDBACK FROM PARTICIPANTS

### From TC/50/36: <u>improving the effectiveness of the Technical</u> <u>Working Parties and Preparatory Workshops</u>

139. The TC considered the proposals concerning possible means of improving the effectiveness of the TWPs and the Preparatory workshops, as set out in document TC/50/35, and agreed:
 [...]
 (b) to make a survey of the participants at the TWP sessions in 2014
 [See document TC/50/36

Report on Conclusions, paragraphs 132 to 140 And document TWF/45/11]

**THANK YOU**