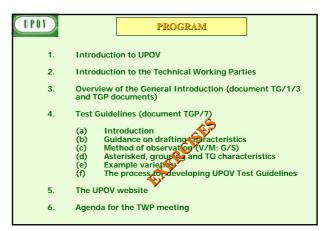
TECHNICAL WORKING PARTY
FOR AGRICULTURAL CROPS

Thirty-seventh Session
Nelspruit, South Africa, 2008

PREPARATORY WORKSHOP

July 13, 2008



1. INTRODUCTION TO UPOV

UPOV

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

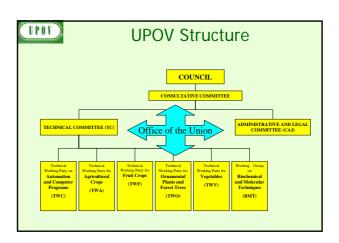
Members of the Union

 States
 Intergovernmental Organization(s)

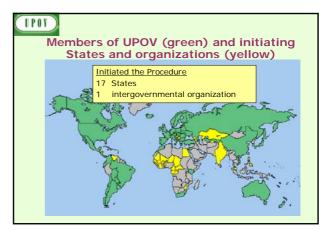
 Organs established by the Convention

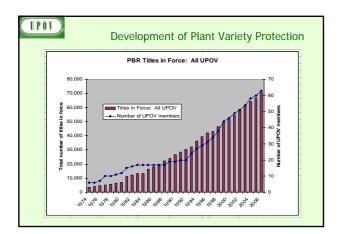
 Council
 Office of the Union

 Other Bodies

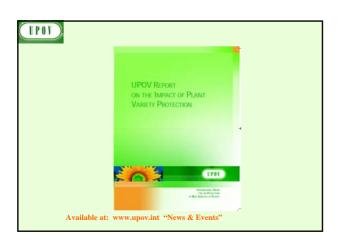






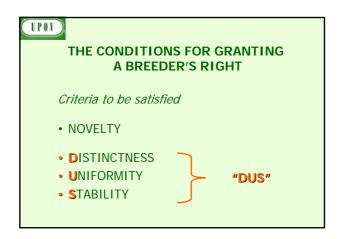


"To provide and promote an effective system of plant variety protection, with the aim of encouraging the development of new varieties of plants, for the benefit of society"



2. INTRODUCTION TO THE UPOV TECHNICAL WORKING PARTIES (THE DUS EXAMINATION)

UPOV

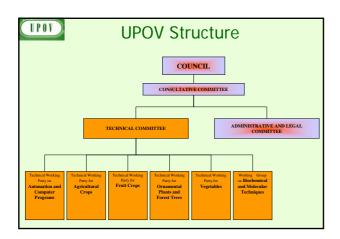


THE CONDITIONS FOR GRANTING A BREEDER'S RIGHT

Other conditions

- VARIETY DENOMINATION
- FORMALITIES
- PAYMENT OF FEES

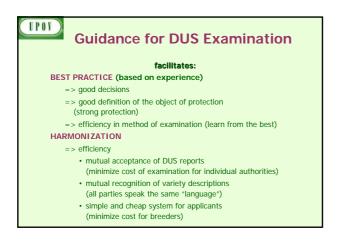
NO OTHER CONDITIONS!



3. OVERVIEW OF THE GENERAL INTRODUCTION

(DOCUMENT TG/1/3 AND TGP DOCUMENTS)

GUIDANCE FOR DUS EXAMINATION



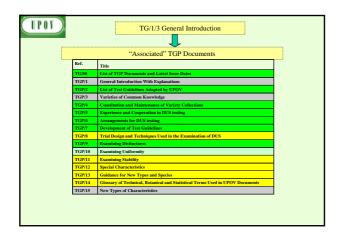
UPOV provides guidance by:

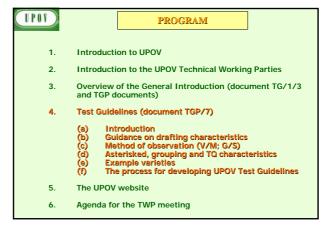
• The "General Introduction" (TG/1/3)

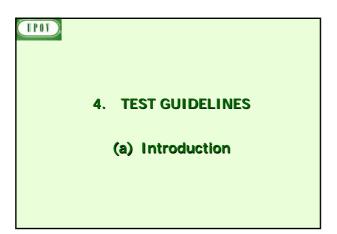
- General technical principles

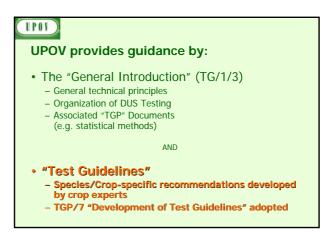
- Organization of DUS Testing

- Associated "TGP" Documents
(e.g. statistical methods)







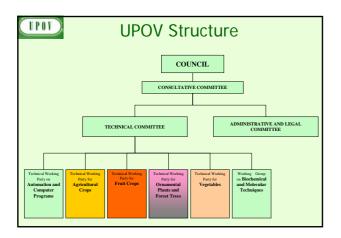


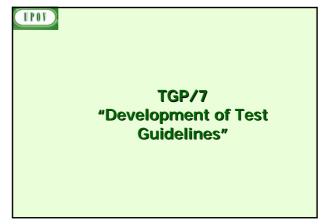


Test Guidelines

• 249 Test Guidelines adopted

• Further 62 to be discussed in 2008
(19 revisions / 43 new Test Guidelines)





1. Introduction

2. Procedure for the Introduction and Revision of UPOV Test Guidelines

3. Guidance for Drafting Test Guidelines

• The TG Template

• Additional Standard Wording for the TG Template

• Guidance Notes for the TG Template

1. Introduction

Purpose of document TGP/7:

\*to provide guidance on the development of

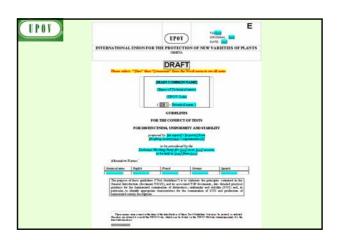
UPOV TEST GUIDELINES

\*to provide guidance on the development of

INDIVIDUAL AUTHORITIES' TEST GUIDELINES,
in the absence of UPOV Test Guidelines

The TG Template
(Annex I of document TGP/7)

•Format of the cover page,
•Universal Standard wording of 10 Chapters,
•Format of the Table of Characteristic (Chapter 7),
•Format of the Technical Questionnaire (Chapter10)





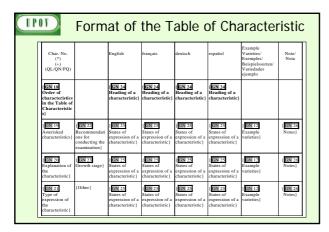
UPOV

# 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



UPOV

## 4. TEST GUIDELINES

# (b) Guidance on drafting characteristics

- selection of characteristics
- types of expression (QL, QN, PQ)
- states of expression / notes

UPOY

# "CHARACTERISTICS"

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

UPOV

## **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):

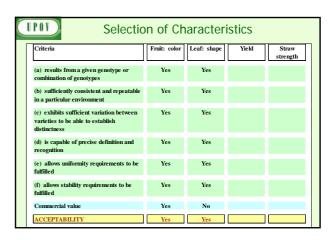
- (a) results from a given genotype or combination of genotypes;
- (b) is sufficiently consistent and repeatable in a particular environment;
- (c) exhibits sufficient variation between varieties to be able to establish distinctness;
- (d) is capable of **precise definition and recognition**;
- (e) allows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

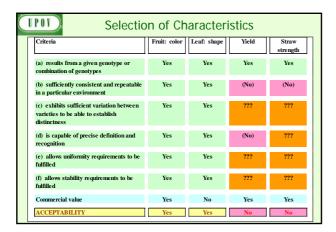
Selection of Characteristics

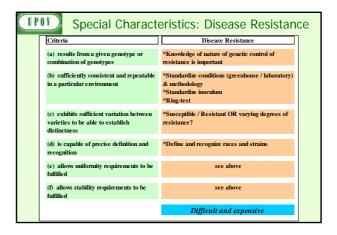
• Yield ???

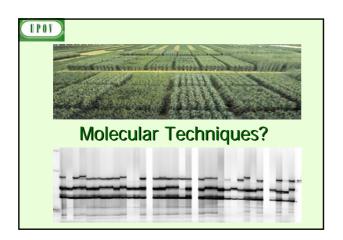
• Straw strength ???

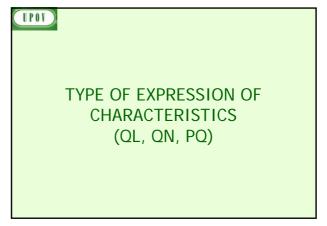
Etc.









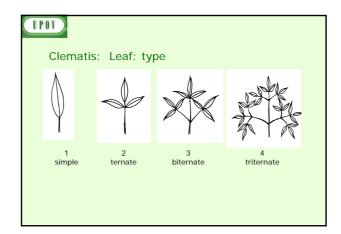


UPOV

### Qualitative Characteristics

"Qualitative characteristics" are those that are **expressed in discontinuous states** (e.g. sex of plant: dioecious female (1), dioecious male (2), monoecious unisexual (3), monoecious hermaphrodite (4)).

These states are self-explanatory and independently meaningful. All states are necessary to describe the full range of the characteristic, and every form of expression can be described by a single state. The order of states is not important. As a rule, the **characteristics are not influenced by environment**.



UPOV

#### Qualitative Characteristics

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)).

UPOV

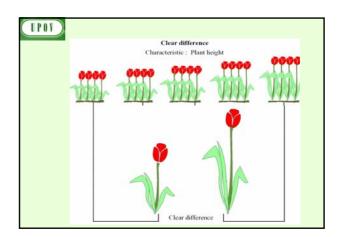
#### Quantitative Characteristics

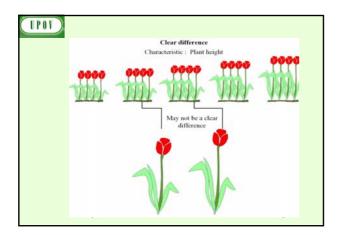
"Quantitative characteristics" are those where the expression covers the full range of variation from one extreme to the other. The **expression can be recorded on a one-dimensional, continuous or discrete, linear scale**. The range of expression is divided into a number of states for the purpose of 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.

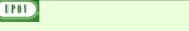
UPOV

## Quantitative Characteristics

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

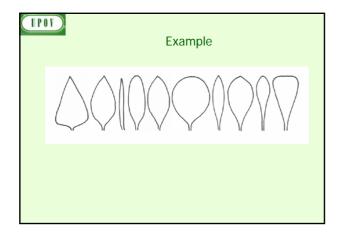


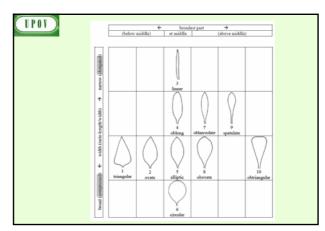


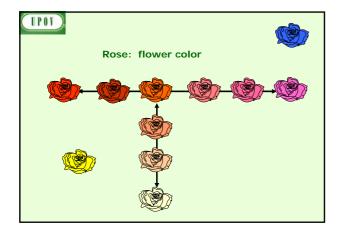


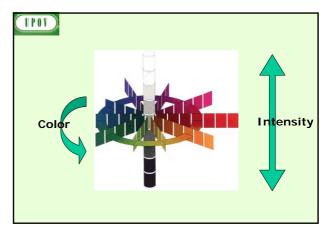
## Pseudo-Qualitative Characteristics

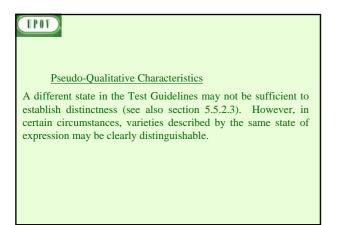
In the case of "pseudo-qualitative characteristics," the range of expression is at least partly continuous, but varies in more than one dimension (e.g. shape: ovate (1), elliptic (2), circular (3), obovate (4)) and cannot be adequately described by just defining two ends of a linear range. In a similar 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.

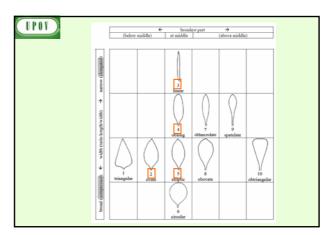


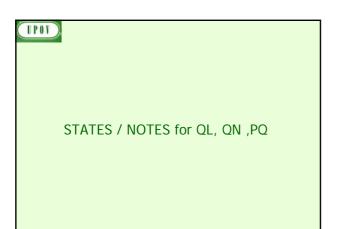


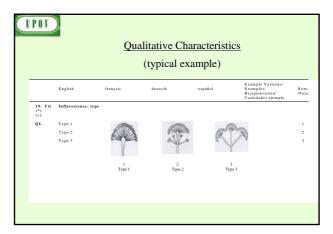


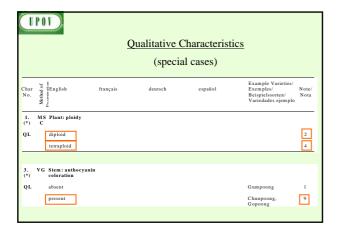


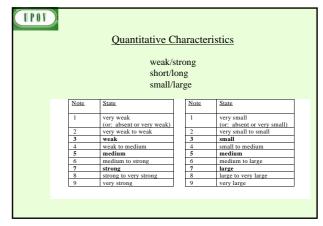


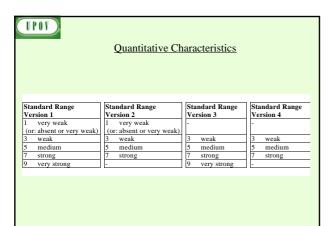


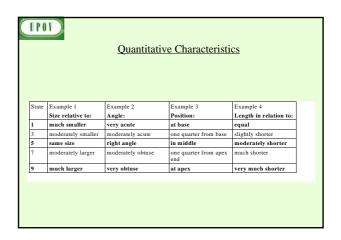


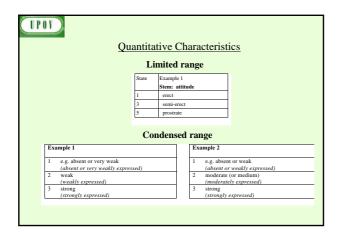


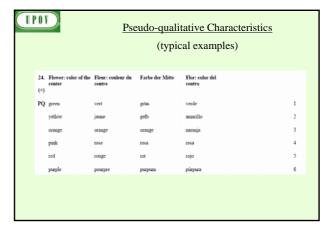


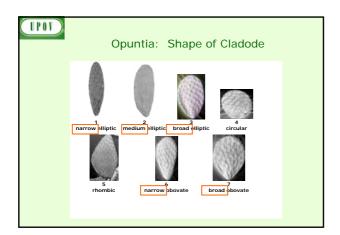


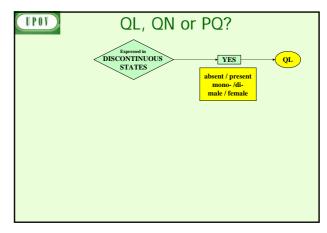


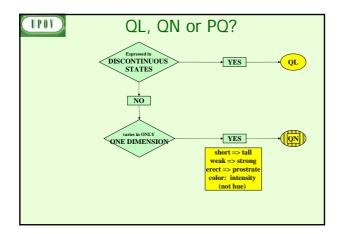


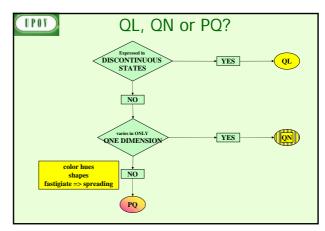


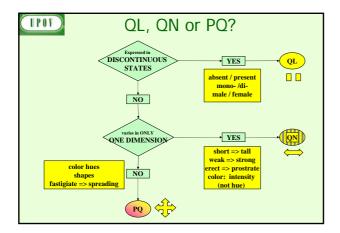


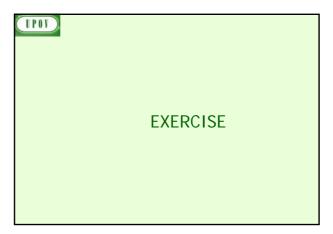








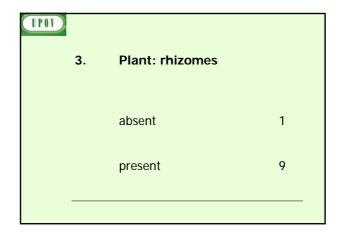


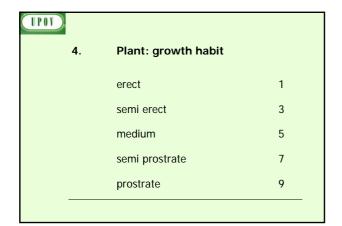


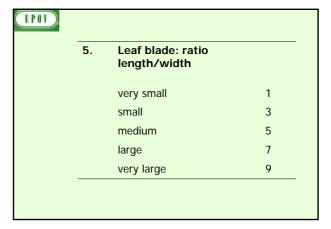
UPOV	Types of Expression
	QL: Qualitative
	QN: Quantitative
	PQ: Pseudo-qualitative

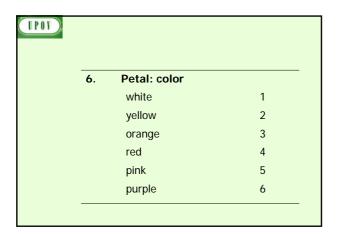
		Note/ Nota
1.	Plant: ploidy	
	diploid	2
	tetraploid	4
	hexaploid	6
	octoploid	8

TPOY		
2.	Leaf sheath: anthocyanii coloration	า
	absent or very weak	1
	weak	3
	medium	5
	strong	7
	very strong	9

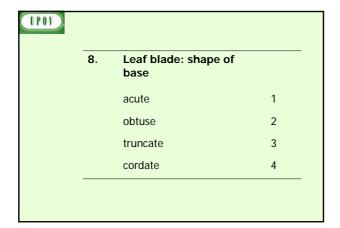


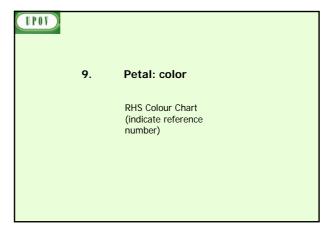


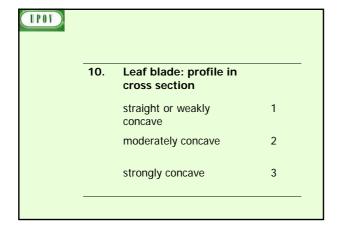


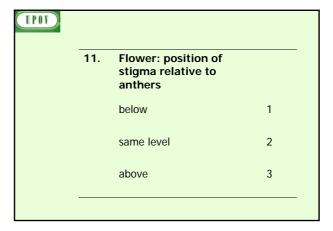


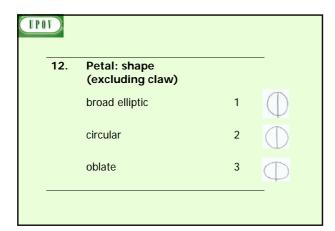
7. Leaf blade: intensity
of green color of
upper side
light 3
medium 5
dark 7





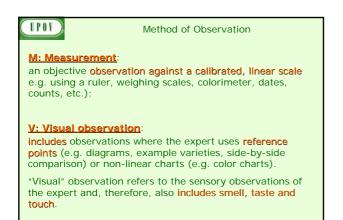


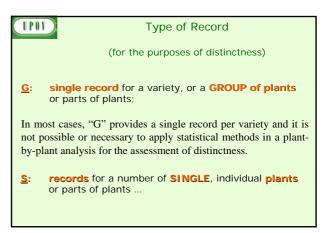


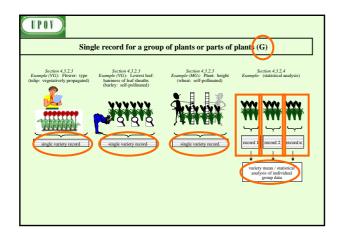


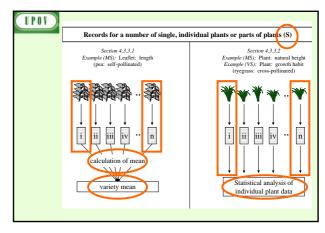
4. TEST GUIDELINES
(document TGP/7)

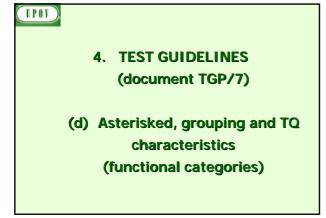
(c) Method of observation
(visual / measurement;
single record / several records)

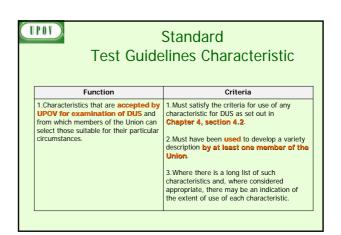






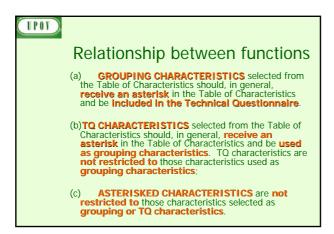


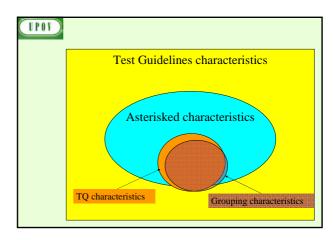




Asterisked Characteristic				
Function	Criteria			
1.Characteristics that are important for the international harmonization of variety	Must be a characteristic included in the Test Guidelines.			
descriptions.	Should always be examined for DUS and included in the variety description by all members of the Union			
	<b>EXCEPT</b> 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 characteristics.			

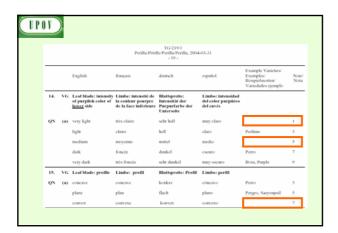
Function	Criteria		
characteristics in which the documented states of expression, even where recorded at different locations, can be used either individually or in combination with other such characteristics: 1. to select varieties of common knowledge that can be excluded from the growing trial used for examination of distinctness, and/or 2. to organize the growing trial so that similar varieties are grouped together	1.(a) Qualitative characteristics or (b) Quantitative or pseudo-qualitative characteristics which provide useful discrimination between the varieties of commo knowledge from documented states of expression recorded at different locations.  2.Must be useful for functions 1 and 2.  3.Should be an asterisked characteristic and/or included in the Technical Questionnaire or application form.		

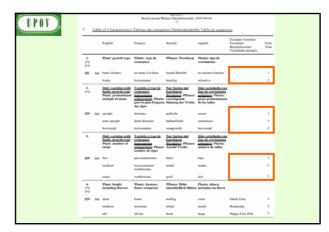


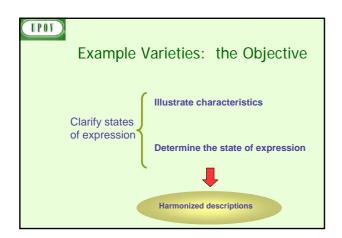


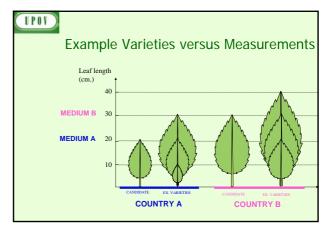
UPOV	
	4. TEST GUIDELINES (document TGP/7)
	(e) Example varieties

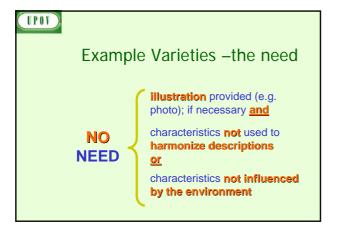
(IPOV)	7. <u>n</u>	able of Characteris	Lettuc tics/Tableau des can	TG/13/9 :/Laitue/Salat/Lechuga, - 7 - nctères/Merkmalsta		ucteres	
		English	français	Deutsch	español	Example Varieties Exemples Beispachsorten Variedades ejemplo	Note/ Nota
	1. (*)	Seed: color	Semence: couleur	Samenc Farbe	Semilla: color		
		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 cetyleden (fully developed)	Plantule: taille du cotyléden (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

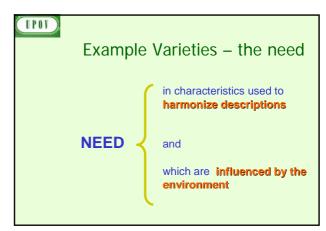


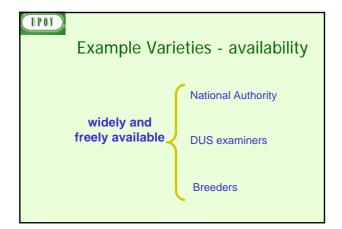


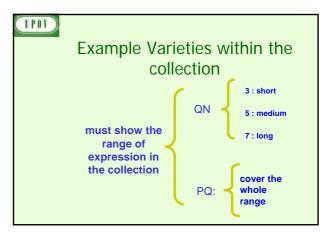












Example Varieties Fluctuation

Maintain the expression for the characteristic in relation to the other varieties in the collection

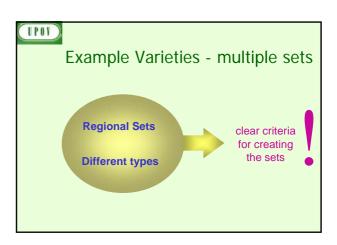
Example Varieties number

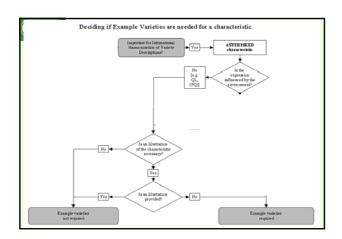
All desired characteristics covered with the minimum number of example varieties

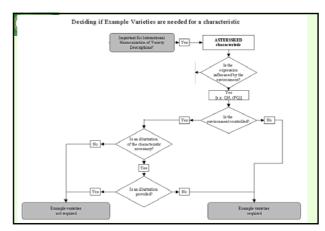
Example Varieties - agreement

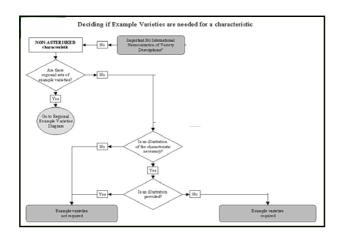
Proposed by the Leading Expert of the TG (in cooperation with interested experts)

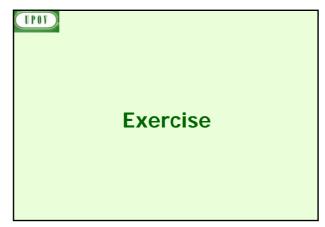
Accepted if no objections are presented



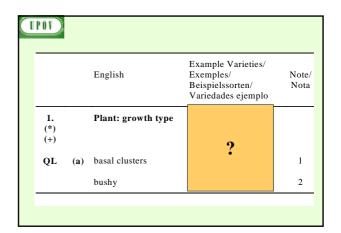




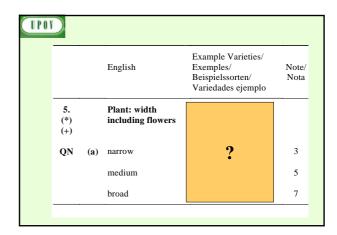


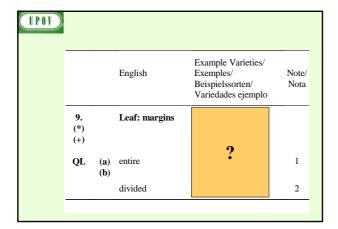


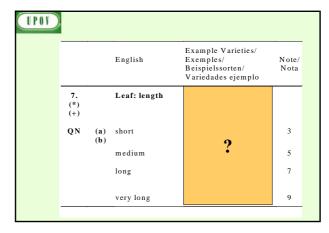
TPOV				
		English	Example Varieties/ Exemples/ Beispielssorten/ Variedades ejemplo	Note/ Nota
4. (*) (+)		Plant: height including flowers		
QN	(a)	short	?	3
		medium		5
		tall		7

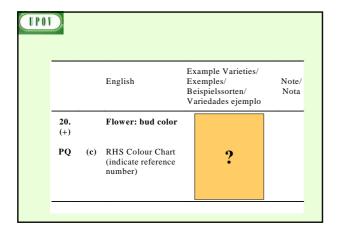


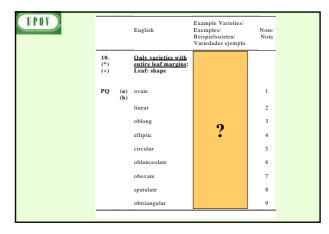
UPO					
	English		English	Example Varieties/ Exemples/ Beispielssorten/ Variedades ejemplo	Note/ Nota
	2. (+)		Only varieties with bushy growth type: Plant: predominant attitude of stems	_	
	QN	(a)	upright semi upright	?	1
			horizontal		5











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# 4. TEST GUIDELINES (document TGP/7)

(f) The process for developing UPOV **Test Guidelines** 

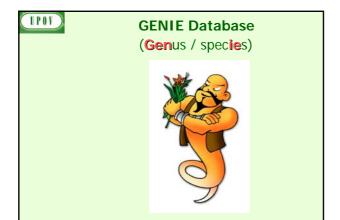
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## **Test Guidelines**

• 249 Test Guidelines adopted

but...

• >2,500 genera and species with varieties examined for PBR



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# GENIE Database 🥞



Variety denomination related information Protection offered by UPOV members

### **DUS information**

- UPOV Test Guidelines
- practical experience of UPOV (document TC/44/4)
- cooperation in DUS examination (document C/41/5)

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## **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

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

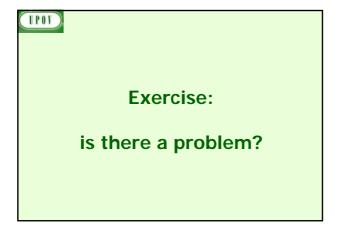
Test Guidelines: Plantus magnifica L.

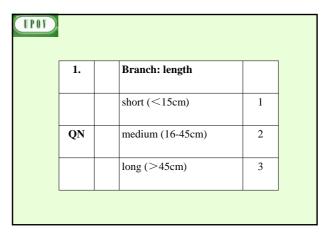
(Common name: Alpha)

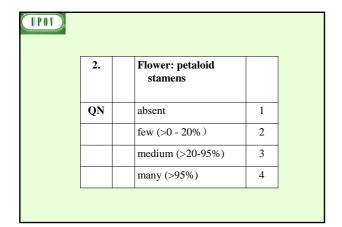
Technical Working Party:

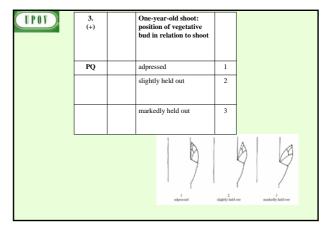
TWX (2005): TWX (2006): Alpha (proj.1) Alpha (proj.2) TWX (2007): Alpha (proj.3)

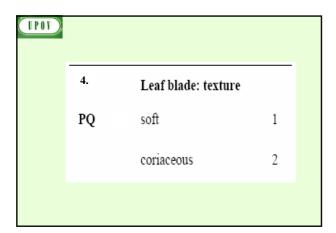
Enlarged Editorial Committee (2008): Alpha (proj.4) Alpha (proj.5) Technical Committee (2008): Final adopted document (2008): TG/500/1

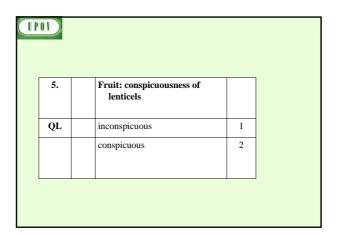


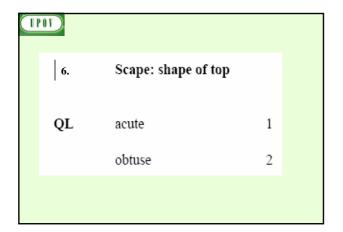


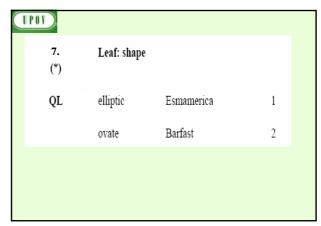


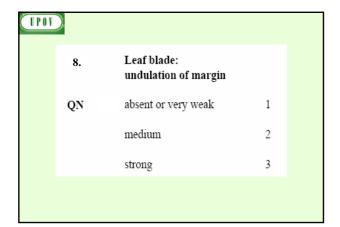


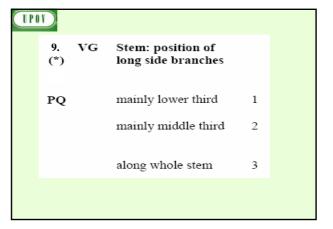












5. THE UPOV WEBSITE









