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COLLECTION OF SOME RULES FOR THE ESTABLISHING OF TEST GUIDELINES

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## **COLLECTION OF SOME RULES FOR THE ESTABLISHING OF TEST GUIDELINES**

During its last meeting in October 1996, the Editorial Committee agreed provisionally on the following rules which it will further develop:

### 1. Remarks or Explanations

Remarks or explanations should be placed in the Test Guidelines as follows:

(a) short remarks for 1 to 3 characteristics should be placed in brackets after the wording of the characteristic in Chapter VII, Table of Characteristics;

(b) remarks or explanations for certain organs or groups of characteristics should be placed in Chapter IV, Methods and Observations;

(c) longer remarks or explanations for one or a few characteristics should be placed in Chapter VIII, Explanations to the Table of Characteristics.

### 2. Asterisk

A characteristic should only receive an asterisk if

(a) it is important for description;

(b) it is needed as a minimum information for the exchange of information on the variety;

(c) if all experts agree to the asterisk (in case one State objects to the indication of an asterisk to a given characteristic and states the reasons (e.g. no discriminating power under his country's conditions), no asterisk should be given);

(d) at least the range of example varieties remains the same in the different countries in case the expressions change from country to country;

(e) in the case of a resistance characteristic that it has the states "absent, present," characteristics with degrees of resistance should not receive an asterisk.

### 3. States of Expression

(a) In a 1 to 9 scale of a quantitative characteristic normally only the states 3, 5, 7 are indicated;

(b) Further states (e.g. 1 and 9) are only mentioned to indicate example varieties. If no example varieties are mentioned they will be deleted.

(c) If state 1 of a quantitative characteristic is indicated also state 9 should be indicated and vice versa (except if state 1 reads “absent, very weak” or corresponding cases).

(d) In case more states than only 3, 5, 7 are mentioned that does not necessarily mean that the whole range is represented in the reference collection.

(e) The mentioning of a state of expression of a quantitative characteristic in the Test Guidelines does not mean that that state really exists in the reference collection.

#### 4. Cutting Down a Characteristic to Several Characteristics

The cutting down should be done as early as possible (e.g. leaf color cut down to color and intensity of color), but may not always be useful (e.g. ornamentation of grain cut down to marbling (1/9), flecking (1/9), dotting (1/9)). It should thus not be obligatory but would depend on each case.

#### 5. Forming Meaningful Characteristics

(a) All Notes of a quantitative characteristic of the Table of Characteristics should be used, also the even Notes possibly not explicitly indicated. The naming of the even Notes must be obvious and clearly formable, otherwise they have to be indicated. If the even Notes are not mentioned in the Table of Characteristics this does not at all mean that these Notes are reserved for states of expression which may occur in future.

(b) It is not possible to form a state of expression by combining two qualitative states, as by definition there is not transition between qualitative states. Therefore the following combinations are not possible: elliptic to ovoid, smaller to equal, flat to convex (e.g. “flat to convex” would include flat and all intensities of convex expression, and therefore would not be a state but a wide range of expression).

(c) If several graduations of a qualitative state of expression are used for a characteristic, all these states of expression should be formed by combining the qualitative expression with a quantitative attribute. Therefore it should read: strongly convex–slightly convex–flat (and not strongly convex–convex–flat), straight–slightly recurved–strongly recurved (and not straight–recurved–strongly recurved), much broader than long–slightly broader than long (and not much broader than long, broader than long), light red–medium read–dark red (and not light red–red–dark red).

(d) For clearly one-dimensional quantitative characteristics a symmetric arrangement of the states around a medium state is meaningful and is planned (e.g. plant length: very short (1), short (3), medium (5), long (7), very long (9); intensity of .....: weak (3), medium (5), strong (7)). If such a characteristic is preceded by an absent/present characteristic, the intensity should always start with “very low.” If a clear differentiation versus “absent” is not

possible, the absent/present characteristic is not justified and the first state of expression should read: “absent or very low.”

(e) In the case of not clearly one-dimensional quantitative characteristics, a symmetric arrangement of the states around a medium state is not necessary (and often not meaningful). Moreover, there is no obligation to use a 1 to 9 scale (e.g.: flat (1), slightly concave (2), clearly concave (3); slightly convex (1), flat (2), slightly concave (3), clearly concave (4); in the middle (1), slightly to the base (2), clearly to the base (3), at the base (4)). In these cases the word “medium” or “intermediate” should be avoided as a term for a state, as it would be meaningless (e.g. leaf shape: intermediate).

(f) In the case of one-dimensional quantitative characteristics which allow only 3 or 4 states, these states should, if possible, be formed in another way than in the usual 1 to 9 scale (e.g. absent or very weakly expressed (1), weakly expressed (2), strongly expressed (3) and not absent or very weak (1), weak (2), strong (3)).

## 6. Connection Between the States of Expression and Minimum Distance of Distinctness

(a) In purely qualitative characteristics each state is clearly separated from the other without any transition; the minimum distance is therefore always one Note.

(b) In purely quantitative characteristics which are observed visually, the scale of states should—if possible—be set up in such a way that as a rule a difference of two Notes can be expected to be a clear difference (this is meant by the requirement that the states be meaningful). However, these two Notes are no absolute standard for the minimum distance. Depending on environmental conditions, variety collection or special pair of varieties, the minimum distance may be more or less than two Notes. It is up to the expert doing the observations to decide on that.

(c) Characteristics which are handled like qualitative characteristics but which are not really qualitative characteristics, should be handled in such a way that possible fluctuations are taken into account when distinctness is assessed (see UPOV/TG/1/2, par. 21). Therefore one cannot automatically presume that the minimum distance is one Note. The sequence of the states should in such characteristics rather be chosen in such a way that as a rule a minimum distance of two Notes can be expected. Accordingly, the states may be for instance for growth habit: erect (1), semi-erect (2), prostrate (3), in one species; erect (1), semi-erect (3), intermediate (5), semi-prostrate (7), prostrate (9) in another species, and for a third species the states may be set up again in a different way

## 7. Grouping Characteristics

(a) As grouping characteristics, in the first instance, qualitative characteristics should be used. In case of doubt, candidate varieties have to be tested in more than one group.

(b) In the Technical Notes the grouping characteristics should have the same wording and states of expression as in the Table of Characteristics.

## 8. Seed Characteristics

Characteristics to be observed on the seed sent in by the applicant should be placed at the beginning of the Table of Characteristics; characteristics to be observed on the seed harvested by the Office should be placed at the end of the Table of Characteristics.

## 9. Intensity Characteristics

For characteristics on color intensity, no example varieties should be indicated except if only one color (e.g. green) is mentioned. Example varieties could be given in the explanations for each color separately.

## 10. Shape Characteristics

If all states of expression of a shape characteristic have some basic shape (e.g. narrow elliptic, medium elliptic, broad elliptic), the characteristic should not be expressed as a shape (e.g. width: narrow, medium, broad).

## 11. Resistance Characteristics

Resistance characteristics should only be included in the Test Guidelines if an agreed standardized method is included as well.

## 12. Example Varieties

(a) If new seed is no longer available for an example variety, the example variety should normally be deleted. It should only be kept if no other example variety can be found representing the expression.

(b) If more than one example variety is indicated, the example varieties should be stated in alphabetical order.

(c) If varieties are indicated for different groups, they should be separated by a semi-colon. They can, however, only be stated if they represent exactly the same expression (e.g. in case of length the same cm or mm under the same condition). If this is not the case, the characteristic has to be split into two characteristics.

(d) For quantitative characteristics, at least for a few states of expression example varieties should—as far as possible—always be indicated.

13. Population Standard

Test Guidelines for all vegetatively-propagated or self-fertilized varieties should contain a paragraph fixing the population standard and the acceptance probability.

14. Addresses

Test Guidelines should not contain addresses or names of experts.

15. Literature

In the case of numerous literature titles cited, a reduced number of the most important titles should be marked.

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## UNWRITTEN RULES FOR TEST GUIDELINES

The more hybrids exist between species, the less groupings are possible.

In annual species more groups are possible than in perennials.

In the Table of Characteristics the order is:

- according to the chronological order of recording (e.g. according to growth stage codes, if existing)
- or according to organs: plant, stem, leaf, flower, fruit.

Example varieties can only be combined for one characteristic if all have been tested at the same place and, if placed for one single state, have shown the same expression at that single place.

Species can only be provisionally indicated as examples if there is no doubt that the whole species shows the expression it represents and only if no example variety exists. Therefore a species cannot be indicated next to an example variety.

In case of characteristics with two single expressions and one combined expression, the combined expression is always placed at the end (e.g. only green (1), only red (2), green and red (3)), unless special reasons justify a different order (e.g. for Grapevine: to avoid an unnecessary deviation from a previous decision by the OIV).

If in the Table of Characteristics two characteristics exist, differing only by one word (e.g. observed an upper side or a lower side of the leaf) that word is underlined to draw attention to it in order to avoid confusion.

In the Test Guidelines abbreviations should be avoided.

A characteristic normally starts mentioning an organ of the plant followed, after a colon, by the suborgan or the specialty to be observed (e.g.: “Leaf: shape of blade” or “Leaf blade: shape”).