# Vriesea (Bromeliaceae, Tillandsioideae): a cladistic analysis of eastern Brazilian species based on morphological characters

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#### **Abstract**

Vriesea, with about 280 species distributed in two sections, Vriesea and Xiphion, is recognized as polyphyletic. We provide the cladistic analysis based on morphological data, with emphasis on species from eastern Brazil, its main center of diversity, which emerged as a monophyletic group in previous molecular and combined analysis. The data matrix contained information of 60 species of Vriesea, and two of Alcantarea, for a total of 62 terminal taxa and 66 characters. The analysis produced one tree with 652 steps. The classic infrageneric division of the sections was not corroborated. Characters traditionally used to separate the two sections supported clades containing species from both sections. Morphologically related monophyletic groups were recognized. Some characters have been highlighted as potentially important in the circumscription of small groups of species and have not yet been much used in the systematics of Vriesea.

Key words: morphology, phylogeny, taxonomy, Vrieseeae.

#### Introduction

Bromeliaceae has been recognized as a natural group since the development of ancient classification systems (e.g., Dahlgren et al. 1985; Cronquist 1988). Recently, their relationship with Poales has been supported by various phylogenetic hypotheses based on plastid sequencing data (e.g., Clark et al. 1993, rbcL; Givnish et al. 2006, ndhF; Bouchenak-Khelladi et al. 2014, rbcL and ndhF). Phylogenetic studies have been conducted in the Bromeliaceae based on both molecular and morphological data. The first group of studies used different data sets, with a focus on relationships among the subfamilies (Ranker et al. 1990; Terry et al. 1997a; Horres et al. 2000; Givnish et al. 2007, 2011), within the subfamilies (Terry et al. 1997b; Crayn et al. 2000; Barfuss et al. 2005; Horres et al. 2007; Schulte et al. 2009; Sass & Specht 2010) or within genera and subgenera (Rex et al. 2007; Sousa et al. 2007; Chew et al. 2010; Versieux et al. 2012). With the exception of the study of Gilmartin & Brown (1987), which questioned the monophyly of the family, its possible sistergroup, and the relationships among the subfamilies, phylogenetic analysis based on morphological data have focused on subfamilies (Varadarajan & Gilmartin 1988), tribes (Forzza 2001), genera (Gilmartin et al. 1989; Leme 2000; Faria et al. 2004; Hornung-Leoni & Sosa 2008; Almeida et al. 2009; Monteiro 2009, Gomes-da-Silva et al. 2012; Saraiva 2013) or subgenera (Gilmartin & Brown 1986; Beaman & Judd 1996; Tardivo 2002; Sousa 2004) in all subfamilies. Combined morphological and molecular data were also used to improve the resolution of the analysis (Faria 2006; Sousa et al. 2007; Aguirre-Santoro 2009; Gomes-da-Silva 2013).

All the phylogenetic analysis conducted has indicated the monophyly of the subfamily Tillandsioideae, and the isolated position of *Catopsis* Griseb. and *Glomeropitcairnia* (Mez) Mez (Terry *et al.* 1997b; Horres *et al.* 2000; Barfuss *et al.* 2005; Givnish *et al.* 2007, 2011; Gomesda-Silva 2013). Despite the homogeneity of the plastid and nuclear sequences used in the analysis in Bromeliaceae (Terry *et al.* 1997b; Horres *et al.* 2000; Barfuss *et al.* 2005; Gomes-da-Silva 2013), the "core tillandsioid" shows great morphological

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and ecological diversification in relation to the rest of the family (Gomes-da-Silva 2013).

Vriesea Lindl., the third-largest genus in the Bromeliaceae (Luther 2012), is currently composed of about 280 species (Luther 2012; Forzza et al. 2014) in two sections: Vriesea and Xiphion (E.Morren) E.Morren ex Mez. The genus has two centers of diversity. The first lies in northern South America, Central America, and the Caribbean (Smith & Downs 1977); and the second lies in eastern Brazil, where ca. 74% of the species occur. Vriesea is also the richest genus of the family in the Atlantic Domain (Martinelli et al. 2008). The species occur primarily in mesophytic environments, but are also common in "campos rupestres", high-altitude fields and inselbergs. The geographic distributions of the species range from very wide, from the north-eastern to southern parts of the Brazilian Atlantic coast, to microendemics (Costa et al. 2014).

However, the genus has been recognized as polyphyletic (Terry et al. 1997b; Horres et al. 2000; Barfuss et al. 2005; Givnish et al. 2011; Gomes-da-Silva et al. 2012) and many taxonomic and nomenclatural changes were made, including transferring of species to Tillandsia L. and the segregation of the genera Alcantarea (E.Morren ex Mez) Harms and Werauhia J.R.Grant (Grant 1993, 1995a, 1995b, 2004; Butcher 2009). Besides its controversial circumscription, there is also difficulties to delimit several species (Costa & Wendt 2007; Costa et al. 2007, 2014). Some of these so-called species-complexes were taxonomic revised contributing to the systematics of the genus (Costa et al. 2009; Gomes-da-Silva & Costa 2011; Versieux 2011; Moura & Costa 2014; Silva 2014; Uribbe 2014). The taxonomic history and a detailed morphological description of the genus are provided by Costa et al. (2014).

The analysis conducted by Barfuss *et al.* (2005), based on seven plastidial regions, suggest the polyphyly of *Vriesea*, since its species emerged into the two main lineages of "core tillandsioids". In one of these lineages, the tribe Vrieseeae, at least four distinct lineages were recognized: two of them formed by Brazilian species of *Vriesea*, with *Alcantarea* as the sister-group; and two others formed by extra-Brazilian species of *Vriesea* and species of *Werauhia*. *Alcantarea* was also recognized as sister-group of *Vriesea* in a molecular analysis based on a low-copy nuclear (*Floricaula/Leafy*) and two plastidial sequences (*trnK-rps16*)

and trnC-petN), where ten species of Vriesea were included (Versieux et al. 2012). In the most inclusive contribution to date, Gomes-da-Silva (2013) conducted the cladistic analysis of Vriesea based on both plastidial and morphological data, in which the Brazilian lineage was recuperate as monophyletic, and Alcantarea was corroborated as its sister-group. In the present study, we performed a cladistic analysis for the species from eastern Brazil of genus Vriesea based on morphological data, focusing especially on the Brazilian center of diversity of the genus, considering the proposed monophyly of this group.

Thus, the aims of this study were: (1) test the monophyly of the sections *Vriesea* and *Xiphion*; (2) recognize monophyletic groups among the Brazilian species of *Vriesea*, to support the taxonomic revisions of small groups; and (3) evaluate potential morphological characters for elucidating phylogenetic hypotheses in the genus.

## **Material and Methods**

Morphology and Taxonomy: The morphology of the Brazilian species of Vriesea is described and commented by Costa et al. (2014). The morphological study was based on a large set of herbarium specimens, field sampling, and observation of specimens grown in private (A. Costa and E. Leme) and public (Instituto de Pesquisas Jardim Botânico do Rio de Janeiro) collections. The main references used to the morphological analysis were Smith & Downs (1977) modified with Stearn (1973), Radford (1986), Weberling (1989) and Sharf & Gouda (2008). The taxonomy followed the monograph by Smith & Downs (1977); for the taxonomic and nomenclatural changes in the family after them, the series De Rebus Bromeliacearum (Luther & Sieff 1994, 1997 a, b; Luther 2001; Luther & Rabinowitz 2010) and the List of Brazilian Species (Forzza et al. 2014) were consulted.

# Cladistic analysis:

Selected taxa. Our study included 60 species of Vriesea from southeastern Brazil, mainly from the Atlantic Forest domain, which represent a monophyletic group (e.g. Barfuss et al. 2005; Versieux et al. 2012; Gomes-da-Silva 2013). The ingroup included species of Vriesea (Appendix 1) with both simple and compound inflorescences of both sections, in an attempt to cover the widest possible range of morphological variation of the Brazilian species of the genus.

We included two species of *Alcantarea* (*A. farneyi* and *A. glaziouana*) as outgroup since it is the sister group of the Brazilian species of *Vriesea* (Barfuss *et al.* 2005; Versieux *et al.* 2012; Gomesda-Silva 2013), representing a suitable group for rooting (Nixon & Carpenter 1993).

Selected samples. The criteria for selection of specimens were based on the good condition of the structures analyzed. Live and dried specimens, flowers preserved in 70% ethanol, photographs, and information in the literature to complement the information gathered from examination of specimens were used. It was selected between one and two vouchers to represent each taxa in the following herbaria, in a total of 99 specimens analyzed: ESA, CEPEC, GUA, HB, MBML, R, RB, SP (for acronyms see Thiers, continuously updated) (Appendix 1).

Selected characters. The characters selected for the analysis are listed in Appendix 2. We selected 66 characters (of which 21 are binary and 45 are multi-state). Due to the heterogeneity and diversity of the species, quantitative characters were included in the analysis. The use of quantitative traits in cladistic analysis has been criticized by several authors (see Poe & Wiens 2000). However, their use can also increase the resolution of the analysis in many cases (Thiele 1993, Rae 1998, Wiens 2001) and should not be rejected. But, is important to clarify that we just use discrete characters (though some them are quantitative) in our analysis and measurements were used only to delimit more precisely the character states, which are largely used in taxonomical studies, e.g. small, medium and large.

Data Analysis. Morphological data were tabulated in a matrix of characters per species (Appendix 3) using Nexus Data Editor Software (NDE 0.5.0, Page 2001). Non-applicable data were represented by "-". Missing data were represented by "?". Autapomorphies were included in the data matrix as results of the cladistics investigation (Yeates 1992), but were not included in the computation of ensemble value of the consistency index (CI), as proposed by Bryant (1995).

We performed an analysis of Maximum Parsimony (MP), with Fitch' parsimony approach (Fitch 1971), and polarized after the rooting (Nixon & Carpenter 1993). All procedures were carried out using TNT (Goloboff *et al.* 2008), and WINCLADA version 1.00.08 (Nixon 2002) was used as a complementary tool for characters

optimization. For characters in which there is more than one most-parsimonious reconstruction (MPR-sets), the criterion for accelerated transformation (ACCTRAN) was used (Swofford & Maddison 1987) aiming to maximize the initial hypotheses of primary homology (De Pinna 1991).

The characters were analyzed with implied weight (Goloboff 1993), with concavity constant equal to eleven (K=11). Characters weighting based on their self-consistence improves the decision among the MPT(s) resolving conflicts produced by homoplasies, especially for morphological characters (Goloboff *et al.* 2008).

TNT was performed with New Technology (cf. Goloboff 1999; Nixon 1999) heuristic search algorithms, with following commands: hold 100000, collapse 3, qcollapse, condense, unique\*, best\*, xmult = rss, hits 5 replications 100 drift 100 fuse 5 ratchet 200.

Relative stability of individual branches was evaluated with two indexes: Bootstrap (BS, Felsenstein 1985) and Jackknife (JK, Goloboff *et al.* 2008). All indexes were calculated using implied weighting. Two different measures were chosen to assess the statistical support of each branch, since there are limitations of the indexes (Soltis & Soltis 2003; Müller 2005). Bootstrap (BS) and Jackknife (JK) were obtained with the same parameters listed above, with 10000 each pseudo-replicates.

## **Results and Discussion**

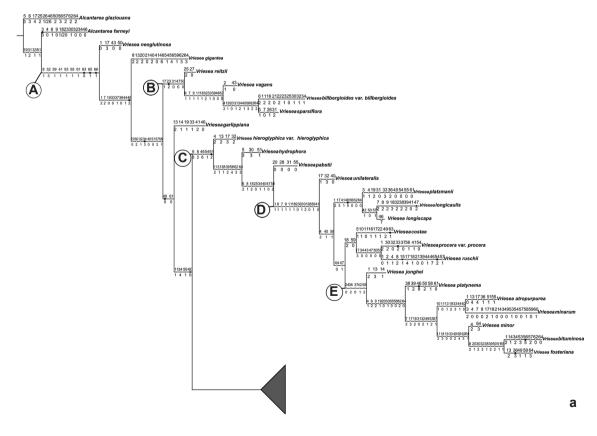
Cladistic Analysis: The cladistic analysis produced one tree with 652 steps. The indexes were CI 0.21, RI 0.52 (Fig. 1). Among the 66 characters analyzed, 65 were informative. The two Alcantarea species emerged as sister to the Brazilian species of Vriesea. In the first infrageneric classification proposed for Vriesea (Wawra 1883), the species subsequently classified under Alcantarea were included in the group Reginae. In the other monographs for the family (Mez 1894, 1896, 1934-5; Smith 1966; Smith & Downs 1977), the essence of the original classification was maintained even with the addition of new species. Only Baker (1889) and Harms (1930) did not consider Alcantarea as a subgenus of Vriesea. The former author classified the species of Alcantarea under Tillandsia subg. Vriesea, and the latter proposed a separate genus for them. Currently, Alcantarea is considered as a valid genus (sensu Harms 1930; Grant 1995 a, b; Versieux et al. 2012) due to the peculiar combination of seeds with a long and erect apical coma, and petals strongly recurvate. Analysis based on molecular and combined data indicate that *Alcantarea* is the sister-group of Brazilian species of *Vriesea* (Barfuss et al. 2005; Versieux *et al.* 2012; Gomes-da-Silva 2013).

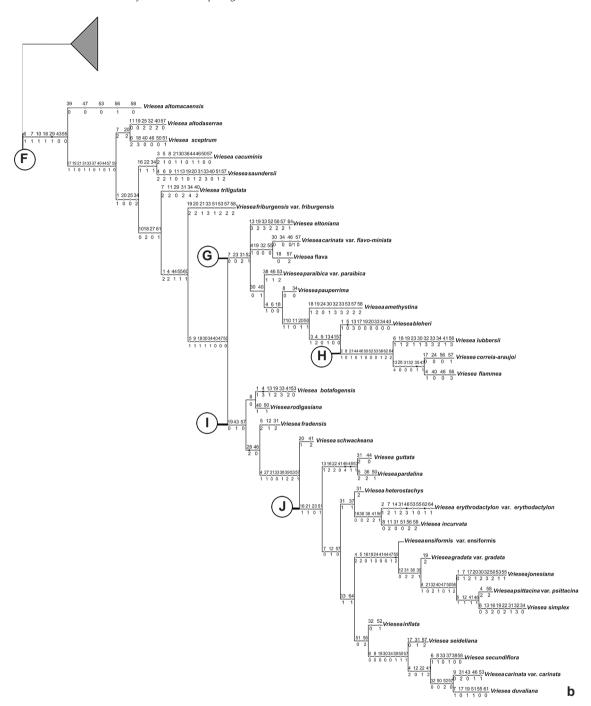
The Brazilian species of *Vriesea* (clade A, BS 90, Tab. 1, Fig. 2) was supported by ten synapomorphies among them, the stamens and pistil in gullet blossom position during anthesis (char. 61:1), the stigma convolute-blade type (char. 63:0), superior ovary (char. 65:1), and the seed with short apical coma (char. 66:1), the three later are not homoplastic. The classic infrageneric division into the two sections *Vriesea* and *Xiphion* (Mez, 1894, 1896, 1934–5; Smith & Downs, 1977) was not supported. However, the study identified clades including species belonging to both sections (clades B, G, H, I, J to *V*. sect. *Vriesea*, and C, D, E to *V*. sect. *Xiphion*).

The clade B is supported by the inflorescence triple raceme (char. 23:2, non homoplastic, and except *V. billbergioides* var. *billbergioides*), the floral bracts membranaceous (char. 47:0), and pedicel less than 5 mm long (char. 50:0). *Vriesea billbergioides* var. *billbergioides* and *V. sparsiflora* 

share the peduncle red (char. 19:1), the white petals (char. 56:3), stamens (char. 62:2), and stigma (char. 64:2), among others. These two species occur in narrow areas of montane forest in Rio de Janeiro and São Paulo States (Costa & Wendt 2007; Costa *et al.* 2007).

The clade C includes species exclusively of V. sect. Xiphion, with both simple and compound inflorescences, and is supported by the foliar sheath more than 13 cm wide (char. 6:3), blade more than 51 cm long (char. 8:2), floral bracts green (char. 46:6), obovate petals (char. 54:1), stamens and pistil in flag-blossom position (char. 61:2), this last one non homoplastic. The basal lineages of this clade have species with compound inflorescences. This grade includes V. hieroglyphica var. hieroglyphica, V. pabstii, and V. hydrophora, all of them with nocturnal and secund flowers, and filaments enlarged toward the apex. These species occur along the Brazilian Atlantic Forest between Espírito Santo and Paraná states forming epiphyte populations. Among them, we highlight the clades V. longicaulis + V. longiscapa and V. procera var. procera + V. ruschi, which include other morphologically related taxa, two groups that





**Figure 1** – Resulting tree as a hypothesis of relationships among species of *Vriesea* and *Alcantarea* outgroup. Black circles non homoplastic characters; white squares, characters with homoplastic transformation.

are in need of better taxonomic circumscriptions of the species. The derived lineages of clade C, are formed by species with simple inflorescences (char 23:0), the clade D. This clade is supported by leaf sheaths castaneous to vinaceous (char. 7:1), and

floral bracts without keel (char. 41:1), among other nine, including quantitative ones. The species of the basal lineages of this clade have secund flowers. In the clade E occurs the reversion to non-secund flowers (char. 37:0) in *V. jonghei*, the type-species of

	5 1
Clades	Synapomorphies
A	8:1, 32:3, 39:1, 41:1, 53:1, 55:1, 61:1, <b>63:0</b> , <b>65:1</b> , <b>66:1</b>
В	17:1, 23:2, 31:0, 47:0, 50:0
C	6:3, 8:2, 46:6, <b>54:1, 61:2</b>
D	1:1, 6:1, 7:1, 9:1, 11:1, 18:1, 23:0, 30:1, 31::2, 38:0, 39:1, 41:0
E	24:0, 36:2, 37:0, 42:1, 58:2
F	6:1, 7:1, 10:1, 18:1, <b>29:1</b> , 43:0, 55:0
G	7:0, 23:0, 31:2, 52:1
Н	2:1, 8:0, 21:1, 44:0, 46:1, 50:0, 53:0, 56:1, 62:2, 64:2
I	19:0, 43:1, 57:0
J	16:1, 21:1, 23:0, 51:1

**Table 1** – Character optimization using ACCTRAN in the resulting tree as a hypothesis of relationships among species of *Vriesea* and *Alcantarea* as outgroup. Discussed clades; exclusive synapomorphies in bold.

V. sect. Xiphion. It is supported by the development of the inflorescence with floral bracts and flowers apressed before anthesis and ascending to patent at anthesis (char. 24:0), flowers patent at anthesis (char. 36:2), base of the floral bracts decurrent (char. 42:1), and petal appendages more than 1.1 cm long (char. 58:2). The species in this clade have always been considered to be closely related (e.g., Mez 1896), and had their identity misunderstood, especially in the major monographs of the family (Mez 1894, 1896, 1934–5; Smith & Downs 1977), probably because of the drying process for herbarium collections of the specimens that fails on preserve structures important to delimitate species, characters such as the color of the floral bracts, the longitudinal posture and the color of the petals, and the position of the stamens and pistil during anthesis. This led to an erroneous interpretation in subsequent works (e.g., Smith and Downs 1977; Reitz 1983; Leme & Marigo 1993; Siqueira-Filho & Leme 2006; Costa et al. 2007). This group now comprises 41 species, which were recently revised by Moura (2011; see Moura & Costa 2014). These species have their center of diversity in eastern Brazil, occurring mainly in the Atlantic Forest Domain, but also in the Cerrado and Caatinga, with only two extra-Brazilian species.

Sister to clade C, the clade F includes only species of V. sect. Vriesea, with simple and compound inflorescences. The basal lineages of this clade include species of compound inflorescence, with primary bract longer than the branch peduncle, narrowly-oblong to linear petals, petals straight with apex apressed, and stamens included, including V. sceptrum, V. saundersii, V. triligulata and also V. altodaserrae, V. altomacaensis and V. cacuminis. These three first species were classified by Mez (1896, 1934–5), Harms (1930), and Smith & Downs

(1977) sometimes in *V.* sect. *Vriesea*, and sometimes in *V.* sect. *Xiphion*. The species belonging to this grade are in need of taxonomic revision, with special attention to floral morphology and geographic distribution (predominantly in forests at higher altitudes and high-altitude fields of the Serra do Mar, Brazil), not only to confirm their position in the genus, but also to improve their circumscriptions.

The clade G includes the species related to V. paraibica that were taxonomically treated by Costa et al. (2009). It was supported by simple inflorescences (char. 23:0), and keel present in two sepals (char. 52:1), among others. The derived lineage of this clade (clade H, BS 82; JK 97) was supported by 11 synapomorphies, among them the presence of stolons (char. 2:1), leaf blades up to 20 cm long (char. 8:0), no keel on the sepals (char. 52:0), stamens (char.62:2) and stigma white (char. 64:2). It includes three species of the so called *V. corcovadensis* group which was taxonomically treated by Gomes-da-Silva & Costa (2011). This group of species, formed by 11 taxa, shares the presence of unusual characters in Vriesea, including linear-triangular leaf blades, less than 1.5 cm in width, upper peduncle bracts longcaudate, peduncle bracts differentiated in blade and sheath, and polystichous flowers (in present analysis synapomorphic and non homoplastic to the highly supported BS 89 and JK 93, V. correia-araujoi + V. flammea), in addition to the utriculiform rosettes. Despite its polyphyletic situation by Gomes-da-Silva et al. (2012), this group was recovered as monophyletic by Gomes-da-Silva (2013) and the present study. Though Smith (1966) suggested that the polystichous flowers are only useful in separating species in the genus and do not justify the adoption of an infrageneric category (sensu Mez 1894, 1896, 1934–5), a more comprehensive phylogenetic

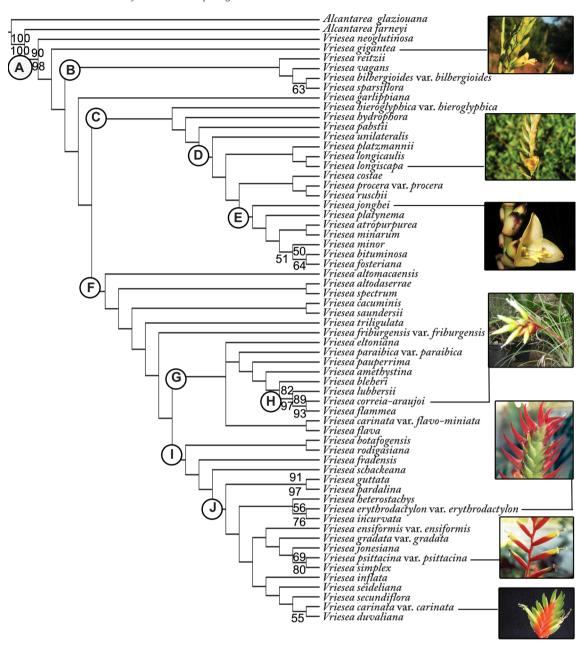


Figure 2 – Resulting tree as a hypothesis of relationships among species of *Vriesea* and *Alcantarea* as outgroup. The numbers above and below each node correspond to the values of Bootstrap (BS) and Jackknife (J) values above 50%, respectively.

analysis in the subfamily will elucidate the evolution of these characters and the relationship of the *V. corcovadensis* group in the tillandsioid complex.

The clade I, sister to G, includes also species from *V*. sect. *Vriesea* with both simple and compound inflorescences, and is supported by the floral bracts inflated (char. 43:1) and the petal appendages obtuse (char. 57:0). The species with

compound inflorescences form the basal grade. The species of clade J, represents a group that now includes about 35 species occurring in the Atlantic Domain (Forzza *et al.* 2014), many of which have questionable circumscriptions (Costa & Wendt 2007; Costa *et al.* 2007). These species have always been treated as a closely related group (e.g., Mez 1896; Smith & Downs 1977), and includes only species

with suberect peduncle (char. 16:1), bracts of the peduncle similar to the floral bracts (char. 21:1), simple inflorescence (char. 23:0), and sepals with 3 cm long or more (char. 51:1). This clade splitted into four morphologically and narrowly related species clades.

The first of them shows a basal lineage formed by V. guttata + V. pardalina and form a well-supported clade (BS 91: JK 97) by the floral bracts rose (char. 46:4) covered with white wax (char. 48:1), among others. These species also share the foliar blades spotted, peduncle and fertile part of the inflorescence pendulous, and floral bracts pale rose. Together with *V. capixabae* Leme the three species form a group which boundaries are sometimes difficult to delimit (Gouda 2011). The second lineage includes V. heterostachys, V. incurvata and V. erythrodactylon var. erythrodactylon, which share the secund flowers (char. 37:1). Two important contributions were made on the phylogeography (Zanella 2013) and morphological variation (Silva 2014) of V. incurvata which helped to improve the species delimitation and its relatives. The lineage formed by V. ensiformis, V. gradata, V. psittacina and their varieties, form a group of species which the boundaries are very difficult to delimit even with live material because of the development of the inflorescence (char. 24:0). The same occurs with V. simplex and V. scalaris (not included in the present analysis), especially due to the feature used to separate one from the other, the length of the floral bract related to the sepals (Smith & Downs 1977). This clade is supported by the red peduncle (char. 19:1), the floral bract with no keel (char. 41:0), with the longitudinal posture involute (char. 44:0), and petals erect with apex strongly recurvate (char. 55:2). The remaining clade, including V. inflata, V. seideliana, V. secundiflora, V. carinata var. carinata and V. duvaliana, was supported by the sepals less than 3 cm long (char. 51:0), and petals yellow with green apex (char. 56:2). The taxonomic revision of the species of clade J is urgent because they form large populations between south Bahia and Rio Grande do Sul states along the Atlantic Forest, and the difficulty in delimiting these taxa resulted in misapplied names in most Brazilian herbarium collections.

The main morphological characters that traditionally distinguish *Vriesea* from *Alcantarea* species are the presence of the seed with short apical coma and the petals erect at anthesis

(Harms 1930; Smith & Downs 1977), both of them were synapomorphic to the genus in the present analysis. The color of the floral bracts and the position of the stamens related to the corolla were homoplastic. These characters were traditionally used to delimit the two sections (Smith & Downs 1977). However, the floral bracts green supported clade C with species of V. sect. Xiphion. The stamens included are synapomorphic and seems to be ancestral to clades C + F, with species of both sections. On the other hand, the exserted stamens supported the clades I + G + V. friburgensis var. friburgensis, all of them belonging to V. sect. Vriesea. Some other characters were adopted by different authors to circumscribe groups of species (Mez 1896; Smith & Downs 1977). The base of the floral bracts decurrent is characteristic of the species of clade E, related to V. jonghei; the species of clade J with species of V. sect. Vriesea have the floral bracts inflated and simple inflorescences; and the development of the inflorescence with the floral bracts and flowers apressed before anthesis and ascending to patent at anthesis are related to species of clades E and V. ensiformis clade.

The results of this analysis allowed the selection of some characters that are potentially important in the infrageneric systematics of Vriesea as the longitudinal posture of the floral bracts (char. 44, for clade H and V. ensiformis clade), presence of keel on the sepals (char. 52, for clade G), shape of the petals (char. 54, for clade C), transverse posture of the petals (char. 55, for clade F and and V. ensiformis clade), shape of the apex of the petal appendages (char. 57, for clade I), shape of the filament (char. 59, clades C+F) and position of stamens and pistil during anthesis (char. 61, for clade C). It deserves notice that some characters were already used as diagnostic for groups of species in the genus but never widely adopted as the petal shape (Wawra 1883) and the shape of the filaments (Morren 1874).

### **Final Remarks**

Although the analyses conducted here did not corroborate the monophyly of the sections, some groups of morphological related species were recuperated with clear synapomorphies. Several characters neglected to circumscribe the groups are proposed as potentially important to the systematics of the genus and should be investigated in a more inclusive analysis in the future.

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