



## Review

# Plant speciation through chromosome instability and ploidy change: Cellular mechanisms, molecular factors and evolutionary relevance

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## ARTICLE INFO

## Article history:

Received 15 May 2014

Received in revised form

17 September 2014

Accepted 17 September 2014

## Keywords:

Polyploidy

Speciation

Unreduced gametes

Aneuploidy

Dysploidy

Somatic polyploidization

Meiotic restitution

Cytological mechanisms

## ABSTRACT

Plant speciation and diversification strongly rely on structural changes in the nuclear genome, both at the whole ploidy and individual chromosome level. Phylogenetic, comparative mapping and cytological studies have provided insights into the evolutionary mechanisms that shape the plant genome. These include major genome alterations, such as whole genome duplication and hybridization (auto- and allopolyploidy), but also comprise the concomitant or independent occurrence of minor chromosome changes, such as aneuploidization and dysploidy (inversions and translocations). Despite the relevance of chromosomal instability as a driver for genome evolution and adaptation, little is yet known about the cellular mechanisms and processes that actually underlie these modifications. Here, in this paper, we provide a comprehensive overview of somatic and meiotic defects that lead to polyploidy or structural genome changes and discuss their relevance for plant genome evolution and speciation. In addition, we elaborate on the existence of stress-induced changes in chromosome and ploidy integrity in plants and their putative role in boosting adaptive genome evolution in hostile environments.

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## Contents

1. Introduction .....	11
2. Meiotic non-reduction – a major driver of polyploidization in flowering plants .....	13
2.1. Sexual polyploidization through unreduced gametes .....	13
2.2. Cellular mechanisms and genetic regulation of meiotic restitution in plants .....	13
2.3. Meiotic restitution upon hybridization drives allopolyploid induction and speciation .....	15
2.3.1. Cellular mechanism of meiotic restitution in F1 hybrids depends on parental genome divergence .....	15
2.3.2. Molecular basis for meiotic non-reduction and 2n gamete formation in F1 hybrids .....	17
2.3.3. Genetic factors promoting F1 hybrid-associated meiotic restitution: lessons from Triticeae .....	17
2.4. Stress-induced meiotic restitution drives WGD under adverse conditions .....	18
2.4.1. Stress-induced meiotic restitution in plants: cellular mechanism and molecular regulation .....	18
2.4.2. Stress-induced meiotic restitution during plant evolution? .....	19
3. Somatic polyploidization .....	20
3.1. Natural pathways for somatic polyploidy in plants .....	20
3.2. Cellular mechanisms causing (pre-)meiotic endomitosis and gametophytic ploidy increase .....	20
3.3. Endomitosis and evolutionary speciation .....	22
4. Karyotype change: aneuploidy, dysploidy and chromosome rearrangements .....	22
4.1. Definitions and overview .....	22
4.2. Karyotype change primarily results from non-homologous recombination events .....	23

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4.3.	Molecular and cytological mechanisms for aneuploidy .....	23
4.4.	Somatic aneuploidy .....	24
4.5.	The relationship between chromosome rearrangements and speciation .....	24
4.6.	Aneuploidy and speciation .....	24
4.7.	Cryptic aneuploidy in allopolyploids: homoeologous chromosome substitutions .....	25
4.8.	Dispensable, “B” and sex chromosomes .....	25
4.9.	Environmental stress can trigger ploidy change .....	25
5.	Conclusions .....	25
	References .....	26

## Definitions

**Aneuploidy:** Loss or gain of one or more chromosomes or chromosome segments relative to an established chromosome complement for a particular genome.

**Autopolyploidy:** Presence of three or more sets of homologous chromosomes or chromosomes from the same origin within a single cell or organism.

**Allopolyploidy:** Presence of three or more sets of chromosomes from at least two different species origins.

**Bivalents:** Pairs of parental chromosomes physically linked by cross-overs (e.g. chiasmata) during early stage meiotic cell division, more specifically from diakinesis up till metaphase I.

**Cytological:** Relating to the cell.

**Cytomixis:** Transfer of DNA or genetic material from cell to cell through cell wall channels.

**Cytological diploidization:** The process by which regular bivalent chromosome pairing arises or is enforced during meiosis after polyploidization.

**Dysploidy:** Rearrangement of DNA and sections of chromosome within an established chromosome complement without loss or gain of DNA, but with change in chromosome number.

**First Division Restitution:** Failure of meiosis to separate homologous chromosomes into separate daughter nuclei, yielding 2n gametes that largely maintain parental heterozygosity.

**Gamete:** A reproductive cell (e.g. ovum or sperm), generally with half the number of chromosomes present in the parent somatic tissue.

**Homeology:** Similarity in DNA sequence between chromosomes with shared ancestral homology that do not behave as homologous chromosomes.

**Homology:** Similarity between whole chromosomes or regions of DNA, usually referring to similarity in DNA sequence and gene order between chromosomes originating from the same species.

**Inbreeding depression:** Accumulative concentration of deleterious recessive alleles and/or increasing homozygosity resulting in negative phenotypic outcomes.

**Interspecific hybridization:** Sexual reproduction involving two gametes from different species origins.

**Karyotype:** The set of chromosomes present within a cell.

**Kinetochore:** Protein complex that localizes to the chromosome's centromere and that functions as a linker between the chromocenter and the spindle microtubuli, enabling chromosome segregation in meiosis as well in mitosis.

**Laggard chromosome:** A chromosome left behind on the metaphase plate after anaphase separates chromosomes into daughter nuclei: such chromosomes may either be excluded from daughter nuclei or rejoin forming daughter nuclei later than other chromosomes.

**Meiocyte:** A cell performing meiotic cell division.

**Meiotic restitution:** Failure of meiosis to produce gametes with half the chromosome complement of the parent individual, resulting in gametes with the somatic chromosome number.

**Microtubule:** Proteinaceous cylindrical structures, composed of tubulin components, that are distributed in the cytoplasm of eukaryotic cells, providing structural support and mediating

subcellular locomotion and transport microtubule through end processing.

**Multivalent:** Physical linkage of three or more chromosomes at the meiotic diakinesis-metaphase I stages through establishment of genetic cross-overs or chiasmata.

**Neo-functionalization:** The acquisition of novel function in one of a pair of genes resulting from a gene or a whole genome duplication event.

**Polyploidy:** The presence of more than two sets of chromosomes within a single cell or organism.

**Somatic:** Of the body, not in the germline.

**Translocation:** The movement of a chromosome segment to a different genomic location, usually via a non-homologous recombination event.

**Transposable elements:** Specialized pieces of DNA that are able to either reproduce copies of themselves to insert elsewhere in the genome or that are able to excise and to move to different genomic locations.

**Second Division Restitution:** Failure of the meiotic cell division to separate sister chromatids into separate daughter nuclei, yielding 2n gametes in which parental heterozygosity is largely converted into homozygosity.

**Sub-functionalization:** The joint functionality of a pair of duplicated genes.

**Univalent:** An unpaired chromosome at metaphase I of meiosis.

**Unreduced gamete:** A gamete that contains the same chromosome complement as somatic cells of the parent individual, instead of the normally reduced gametophytic chromosome number.

**Whole genome duplication:** An event resulting in the presence of two copies of every chromosome and duplication of all genetic information within a single cell or individual.

## 1. Introduction

Flowering plants (angiosperms) show a high level of biodiversity, comprising an estimated number of 352,000 species subdivided in 14,559 genera and 405 families [1]. From an evolutionary perspective, this high level of variability indicates that plants have undergone extensive diversification and adaptive radiation, progressively generating new species adapted to a multitude of environments [2–5]. As sessile organisms, land plants require enhanced phenotypic adaptability and flexibility to cope with highly variable external parameters, such as extreme climate conditions, nutrient deprivation and ecosystem competition. On the genomic level, plant diversity correlates with a high degree of variation in overall genome size, ploidy level and chromosome number [6,7]. Known plant genome sizes range from 1C = 0.0648 pg in *Genlisea margaretae* to 1C = 152.23 pg in *Paris japonica* [8]. From an evolutionary standpoint, this extreme genomic variability results from a long lasting process of genome adaptation and change [9]. Much of this genomic variation is due to the action of transposable elements [10]; however, of potentially more functional importance are the cytological mechanisms permitting interspecific

hybridization, polyploidization and genome change through meiotic and mitotic mechanisms. Numerous types of chromosomal adaptations and ploidy alterations result from aberrations in the ubiquitous meiotic and mitotic processes, including whole genome duplications and chromosome rearrangements. Increasingly, these processes are found to provide underlying mechanisms for plant speciation, particularly in response to environmental change [11–13].

Recently, a great deal of attention has been paid to the role of individual gene doubling and whole genome duplication (WGD) events in speciation, particularly in plants. The process of WGD has thereby been proposed to act as a major source of evolutionary genomic variability and plasticity, hence constituting one of the main mechanisms driving diversification and speciation [9,14,15]. Indeed, several phylogenetic studies and comparative genome analyses have confirmed that most flowering plants have undergone one or more ancient WGDs early in their evolution, and that several species seem to have experienced one or more additional rounds of more recent, independent polyploidization events [16–20]. In addition, recent comprehensive phylogenomic analyses revealed the occurrence of two WGD events in ancestral plant lineages shortly before the divergence of extant seed plants and angiosperms. A common genome triplication event preceded the rapid radiation of core eudicot lineages, providing substantial evidence that gene and genome duplication and associated changes in chromosome stability have triggered evolutionary novelties and radiative adaptation, contributing to the rise and dominance of flowering plants [21,22].

In plants, like in other species, polyploid genomes are typically associated with major changes in genomic structure and phenotypic outcome, providing a broader basis for adaptivity and evolvability compared to their diploid counterparts. Studies using neo- and synthetic polyploids have revealed that polyploidy induces distinct phenotypic and morphological changes, such as differences in flowering time and flower number [23], plant structure and root architecture, as well as alterations in plant physiology, (a)biotic stress tolerance and other developmental processes [24]. Polyploidy has also been associated with increased heterozygosity, higher selfing rates, induction of asexuality and reduced inbreeding depression [25]. In the search for the putative mechanisms behind enhanced phenotypic variability of polyploids, a multitude of recent molecular and genomic studies have revealed that *de novo* polyploid induction causes both rapid and more prolonged changes at the genetic and epigenetic level, together with major alterations in the transcriptional landscape [26,27]. At the onset, polyploidy is associated with rapid and extensive restructuring of the genome, including profound changes in chromosome number and structure (translocations, deletions) [28–32] and epigenetic alterations, such as transposon activation, chromatin modifications and altered methylation patterning [33–38]. As a result of this initial ‘genomic shock’, newly formed polyploid plants often show distinct changes in their gene expression profile (e.g. gene silencing), often reflected by associated changes in the phenotype [39–42]. This initial period of genomic stress is often associated with plant lethality or reproductive sterility, largely impairing the reproductive success of the newly formed polyploidy [36,43]. Polyploids that are able to pass this initial bottleneck of genomic instability subsequently enter a second, more prolonged phase of genome evolution, whereby duplicated genes are either progressively lost [44] or retained, often showing sub- or neofunctionalization to yield novel genetic combinations and gene complexes [45–51]. As this process reduces genomic redundancy and converts the polyploid cell into a diploid one, both on the cytological and genomic level, this evolutionary process is often referred to as ‘diploidization’. Hence, through the combined changes in genetic and epigenetic structure, genome duplication in the long term provides an important source of

genetic flexibility, allowing an increased level of mutation, drift and selection and the associated emergence of evolutionary novelties [52]. Based on these observations, it is now generally assumed that plant evolution is characterized by repeated rounds of large-scale genome duplications (WGDs), followed by selective loss of individual genes, chromosomes or genome fragments and associated diploidization [25,53].

Historically, two types of polyploids are recognized: auto- and allopolyploids (sometimes referred to as polysomic and disomic). Although there is ambiguity about the definition of these two categories, the primary criterion for classifying a polyploid is its mode of origin. Autopolyploidy refers to polyploids originating from a polyploidization event within or between populations of a single species (intraspecific), whereas allopolyploids are the result of hybridization events between different biological species (interspecific) [25,54]. Early cytogeneticists believed chromosome pairing to be a reliable indicator of chromosome divergence and homology, using frequency of multivalent formation as a cytological parameter to distinguish between auto- and allopolyploidy [55]. Hereby, a high level of multivalent pairing in meiosis I suggested strong homology between chromosome sets and hence autopolyploidy. On the contrary, the predominant formation of bivalents was thought to result from the presence of non-homologous parental chromosome sets, hence indicating allopolyploidy. In spite of these classifications, the differentiation between auto- and allopolyploids is not absolute, since multivalent formation has been observed in hybrid polyploids, and bivalent pairing has occasionally been retrieved in intraspecific polyploids [56,57]. As a consensus and with the advent of molecular genetics, auto- and allopolyploids are now considered two extreme ends of a genome duplication-constituted continuum, in which the gradient of divergence between the parental genomes (and thus also the level of bivalent chromosome pairing) determines the level of auto- or allopolyploidy.

Comparative genomics and phylogenetic studies suggest that both auto- and allopolyploidization have played a prominent role in plant speciation and diversification. For example, DNA sequencing technology has detected remnants of interspecific hybridization events in the evolutionary history of many modern polyploid species [9,58–61]. Similarly, autopolyploid origins have been established for apple (*Malus x domestica*) [62] and for a triploid tropical lucerne cytotype (*Arachis pintoi*) [63]. However, despite the evolutionary relevance and occurrence, the exact mechanism(s) and cellular process(es) underlying evolutionary events of polyploid origin remain largely unknown. Currently, there seems to be a major discrepancy between studies of speciation, which tend to take an ecological and population genetics perspective, and cytological studies of mitotic and meiotic cell division and associated alterations in chromosome behavior and genome stability. Meiotic mechanisms have occasionally been investigated in relation to speciation [64,65], but experimental investigation into the role of chromosome change (aneuploidy and dysploidy) in plant speciation has traditionally lagged behind similar studies in animals [66]. However, with the advent of molecular genetics and genomics, next-generation sequencing and cytogenetic techniques, the role of chromosome change in speciation events can be more thoroughly investigated [67]. Hybridization may also occur without associated genome doubling [68] and increasing evidence suggests that hybridization without polyploidy can also play a major role in speciation events [69]. However, despite the abundant knowledge on hybridization- and polyploidization-induced genome flexibility and associated chromosome instability, the exact cytological mechanism(s) and cellular process(es) fuelling repeated boosts of diversification and speciation during plant evolution remain largely unknown.

During the last decade, a plethora of mitotic and meiotic cell division anomalies have been implicated in trans-generational

ploidy change and chromosome instability. To what extent these anomalies have contributed to plant speciation events remains largely elusive. However, recent studies provide preliminary evidence for the involvement of distinct cytological processes, strongly dependent on the type of speciation (e.g. hybridization or polyploidy) and the presence of genetic or environmental factors. In this review, we describe the three major cytological mechanisms causing ploidy change: (1) meiotic non-reduction and 2n gamete formation, (2) somatic genome duplication and (3) minor karyotype changes through aneuploidy and/or dysploidy, and outline their role as drivers of plant speciation. We focus on underlying cellular defects and associated molecular regulators and outline specific induction through genomic and environmental stresses, suggesting a role for stress-induced polyploidization and chromosome change in plant evolution. Recent advances in our understanding of the cytological mechanisms facilitating rapid chromosome change highlight an intimate association with environmental stress conditions and specific genomic conditions (mutations, hybridization), and suggest pathways for natural and induced species formation through changes in chromosome or ploidy constitution.

## 2. Meiotic non-reduction – a major driver of polyploidization in flowering plants

### 2.1. Sexual polyploidization through unreduced gametes

The meiotic cell division is a critical reproductive process, and is tightly controlled to guarantee reductional homologous chromosome segregation and subsequent formation of haploid male and female gametes. In some instances, however, alterations in the meiotic program or cellular defects in meiosis I (MI) or meiosis II (MII) may switch the meiotic cell division into a mitotic-like one, generating diploid spores out of a diploid mother cell. This mechanism is generally termed meiotic restitution or meiotic non-reduction, and the resulting gametes are referred to as unreduced or 2n gametes [70–73]. Importantly, the ectopic formation of diploid gametes, instead of the normal haploid ones, intrinsically leads to progeny with an increased chromosome number. This mechanism of genome polyploidization is termed ‘sexual polyploidization’ and can be subdivided into two types: bi- and unilateral sexual polyploidization [54]. In the former, fusion between two diploid gametes yields a tetraploid individual, which, depending on the selective conditions, may initiate the de novo establishment of a stable tetraploid lineage. By contrast, in unilateral sexual polyploidization events, one diploid gamete fuses with a normal haploid one to generate a triploid embryo. Although triploid seeds are often non-viable through imbalances in parental genome dosage input in the endosperm [74], this triploid block is occasionally incomplete or absent allowing triploid plant formation [75,76]. Meiotic cell division in these triploids is generally extremely unbalanced yielding aneuploid gametes. However, through random segregation triploids also produce some euploid gametes, both haploid and diploid, which may contribute to the establishment of stable polyploid populations over time [77]. This process is generally referred to as the triploid bridge hypothesis [54] and is suggested to play a role in evolutionary polyploidization events.

A large number of different cellular defects conferring meiotic restitution have been described. From a genetic point of view, these mechanisms are classically subdivided into two main groups, namely First Division Restitution (FDR) and Second Division Restitution (SDR) (extensively reviewed in Refs. [71,73,76]). In brief, SDR mechanisms yield 2n gametes that are genetically equivalent to those formed by a loss of the second meiotic cell division. SDR gametes hence contain both sister chromatids from the same chromosome and display loss of parental heterozygosity from the

centromere to the first site of crossing-over (CO). In contrast, 2n gametes resulting from FDR-type meiotic restitution are genetically equivalent to those formed by a loss of MI. Hence, in FDR-type restitution, sister chromatids from the same homolog are split but homologous chromosomes are retained, and resulting gametes maintain parental heterozygosity in chromosomal regions spanning the centromere to the first CO. Interestingly, when FDR also includes a complete loss of meiotic recombination, the meiotic cell division is converted into a mitotic one, yielding 2n gametes that fully retain the parental genome constitution, including heterozygosity and epistatic interactions. This type of meiotic restitution is often observed in female gametogenesis of apomictic plants and parthenogenically reproducing animals as a reproductive adaptation to generate clonal progeny.

### 2.2. Cellular mechanisms and genetic regulation of meiotic restitution in plants

Detailed cytological studies in several plant species have revealed that meiotic restitution can originate from a plethora of cellular defects. These are generally subdivided into three main classes: (1) alterations in meiotic spindle dynamics; (2) defects in meiotic cell plate formation and (3) omission of meiosis I or II (reviewed in Refs. [71–73]).

Alterations in meiotic spindle dynamics occur in either meiosis I or II and are caused by structural defects in spindle biogenesis, microtubule (MT) nucleation, kinetochore functioning or spindle orientation and organization. Although these defects generally lead to imbalances in chromosome dynamics and segregation, yielding aneuploid gametes, occasionally the presence of non-separated chromosomes induces a meiotic restitution event [78]. For example in cereal hybrids, such as wheat-rye F1 plants, both the ectopic formation of curved MI spindles and defects in spindle-kinetochore attachment completely block metaphase I chromosome separation and cell plate formation, yielding restituted cells which progress through MII to form dyads containing two unreduced gametes [79]. However, despite this, meiotic restitution in plants more commonly results from alterations in the three-dimensional organization of the spindle structure(s). In meiosis I, defects in bipolar spindle orientation either partially or fully omit polar-directed chromosome segregation, yielding restituted MI nuclei capable of undergoing meiosis II [80]. In meiosis II, alterations in the spatial positioning of the two metaphase spindles may lead to a rejoining or even a non-disjunction of the two haploid chromosome sets, eventually yielding restituted nuclei [81]. Particularly in male meiocytes of dicotyledonous plants, proper perpendicular orientation of the two MII spindles is crucial for correct chromosome segregation and meiotic ploidy reduction [82,83]. Indeed, the ectopic induction of tripolar (tps) and parallel (ps) or fused (fs) spindles has been found to reduce MII polarity from tetrahedral to tri- or bipolar, respectively, so that MII spindles rejoin chromatids at one or both poles, generating meiotically restituted FDR-type 2n gametes [84,85]. Interestingly, in most cases, ps, fs and tps are jointly observed in the same flower [82,83,86,87], indicating that all three processes constitute a different outcome of one common cellular defect. However, up till now, the underlying mechanism has not been revealed yet.

Studies in potato and *Arabidopsis thaliana* have revealed a genetic background for the ps/tps/fs male meiotic defect and resulted in the identification of several proteins required for MII spindle polarity, including JASON, AtPS1 (*A. thaliana* PARALLEL SPINDLES 1) and AFH14 [82,83,88]. Mutant forms of these proteins induce the formation of dyads and triads in male meiosis through alteration of MII spindle orientation, yielding 2n gametes capable of inducing sexual polyploidization. AFH14 is an *Arabidopsis* type II formin (FORMIN 14) that functions as a linking protein between

microtubules (MTs) and microfilaments (MFs) [88]. AtPS1 encodes an unknown plant-specific protein with an N-terminal Forkhead Associated (FHA) domain and C-terminal PINc domain, typically involved in protein–protein interactions and RNA processing and decay (i.e. Nonsense mediated mRNA decay), respectively [82]. JASON, on the other hand, is an unknown, plant-specific protein that positively regulates *AtPS1* transcript levels in early stage flower buds, suggesting that JAS controls MII spindle organization through AtPS1 [83].

Ps-induced 2n gamete formation has already been documented in several plant species and is hence considered one of the major routes for 2n gamete formation and sexual polyploidization in plants. Whether the meiotic ps defect and one or more underlying causative mutations has driven WGD in the evolution of sexually reproducing plants remains unknown. Interestingly, studies in potato revealed that tetraploid cultivars and related wild taxa contain a higher ps allele frequency compared to the ancestral diploid population, indicating that ps and the associated formation of 2n gametes has been the driving force behind the origin of cultivated tetraploid potatoes [89,90]. Although not yet demonstrated in other naturally evolved populations, this study shows that ps and other 2n gamete-forming mutations may have laid the basis for evolutionary WGD events and associated speciation and diversification in plants.

A second type of meiotic restitution in plants involves alterations in meiotic cytokinesis. Defects in meiotic cell plate formation either originate from (1) precocious induction of cytokinesis or (2) partial or complete loss of meiotic cell plate formation, either after MI or MII [73,84,91,92]. In both cases, physical separation of nuclei following MI or MII is affected, with two or more haploid nuclei enclosed in a common cytoplasm. Subsequent fusion of syncytial nuclei in these bi- or polynuclear cells eventually yields diploid or polyploid spores, forming a sexual basis for whole genome doubling [93–96].

Precocious induction of meiotic cell wall formation is only sporadically reported, either in MI [95] or MII [85], and hence not considered an important mechanism for meiotic restitution. In contrast, unreduced gamete formation through loss of cell plate formation has frequently been observed in different plant species [78,91,95–98], suggesting it is an important cellular mechanism driving sexual polyploidization. In meiocytes with a successive-type of cell division, loss of cell plate formation may either occur after MI or MII, generating FDR- or SDR-type 2n gametes, respectively [93,99]. In simultaneous-type PMCs, which form a “double wall” at the end of MII, loss of meiotic cell wall formation may either be partial or complete, yielding diploid, triploid or tetraploid gametes [96].

From a mechanistic point of view, loss of meiotic cell plate formation can result from several types of cellular anomalies, including alterations in microtubule (MT) array biogenesis or stability [100,101], defective transport of cell wall material, disturbed membrane vesicle fusion [102] and reduced deposition of callose [103]. For example, several studies using *A. thaliana* mutants have revealed that structural or functional irregularities in the establishment of internuclear radial microtubule arrays (RMAs) at the end of MII causes defects in cytokinesis, hence yielding bi- or polynuclear spores [100,101,104,105]. In addition to these ‘basal’ cytokinetic defects, alterations in meiotic cytokinesis may also occur as a secondary effect resulting from irregularities in spindle elongation or orientation. Indeed, studies on the maize MATH-BTB domain protein MAB1 revealed that the shorter spindles in *mab1* RNAi meiocytes cause an insufficient separation of telophase II nuclei, impairing subsequent internuclear cell wall formation and hence generating bi- or polynuclear spores [106]. Moreover, an extensive analysis of MT structures in potato and *Populus* meiocytes demonstrated that alterations in tetrahedral MII nuclei positioning

through irregularities in spindle orientation cause defects in interzonal RMA formation, indicating that meiotic non-reduction by ps, fs and tps actually results from ‘secondary’ defects in MII cell plate formation [85,92].

Thirdly, meiotic restitution may also originate from a complete omission of one of the meiotic cell divisions. In the case of loss of MI, both the processes of meiotic recombination and reductional cell division are omitted, and MII separates sister chromatids into two diploid FDR-type daughter cells, genetically identical to the parental line [107–110]. This process of clonal gamete formation is referred to as diplosporous apomeiosis [111,112] and is often observed in apomictically reproducing species, both in plants as well as in other eukaryotic clades [113–115]. Contrary to loss of MI, failure of MII still enables homologous recombination and MI chromosome segregation, however, separation of sister chromatids does not occur. Instead, centromeric cohesion is lost at the end of MII, yielding dyads that contain SDR-type 2n gametes [109,116].

In sexually reproducing species, loss of meiotic cell division has also repeatedly been observed [107,117–120], and hence may be considered an alternative mechanism driving natural polyploidization. Moreover, apomeiosis and clonal 2n gamete formation is the rule in apomictically reproducing species, indicating that the developmental switch from meiosis to apomeiosis forms a natural pathway for plant reproductive evolution [121,122]. In support of this, phylogenetic studies revealed that in many species apomixis evolved repeatedly from sexual pathways and this in several independent origins [123,124]. More importantly, in most species apomixis has been found strongly correlated with genomic instability and polyploidy [25,125,126], suggesting that the process of apomeiosis not only confers asexual reproduction but also induces transgenerational ploidy increase, and hence drives evolutionary polyploidization [127,128]. Although still under debate, it is postulated that polyploidy hereby functions as a genomic stabilizing factor, reducing the impact of deleterious mutations in the short term and hence providing a selective advantage over diploid apomicts [129–131].

Progression of the meiotic cell cycle and consolidation of reductional division in sexually reproducing species is tightly controlled by a complex network of (epi-)genetic factors [132,133]. Interestingly, genetic defects in some of these regulators have been found to induce meiotic restitution and 2n gamete formation (extensively reviewed in Refs. [72,73]), indicating that (epi-)genetic defects in meiotic cell cycle regulation may constitute a basis for sexual WGD. For example, genetic studies in *Arabidopsis* have identified two proteins, e.g. TAM (TARDY ASYNCHRONOUS MEIOSIS) and GIG1/OSD1 (GIGAS CELL1/OMISSION OF MEIOTIC DIVISION1) that are required for progression of meiotic cell division, and more specifically the MI-to-MII transition. As a result, functional loss of one of these proteins causes a complete omission of MII, generating dyads that contain SDR-type 2n gametes [109,116]. GIG1/OSD1 is an inhibitor of the Anaphase Promoting Complex/Cyclosome (APC/C) and functions in the maintenance of elevated CDK (CYCLIN-DEPENDENT KINASE) levels after MI [134,135]. TAM, on the other hand, encodes an A-type cyclin, e.g. CYCA1;2, that forms a functional complex with CDKA;1, to regulate meiotic cell cycle progression [116,136]. Besides regulators of MI-to-MII cell cycle transition, several other proteins implicated in the initiation of meiotic cell division, e.g. the mitosis-to-meiosis switch, have been identified. These include the *Arabidopsis* meiotic prophase I protein DYAD/SWITCH1 [108,137,138], the APOLLO (APOmixis-Linked Locus) histidine nuclease recently identified in *Boechera* [139], the maize DMT102 and DMT103 DNA-methyltransferases [140], the maize AGO104 (ARGONAUTE 104) protein [110] and its *Arabidopsis* ortholog AGO9 [141] and other proteins acting in the 24 nucleotide siRNA-mediated silencing pathway, such as RNA-dependent RNA polymerase 2 and 6 (RDR2 and RDR6), SUPPRESSOR OF GENE

SILENCING 3 (SGS3), DICER-LIKE 3 (DCL3) and POLYMERASE IV and V (NRPD1a and b). Functional loss of function of each of these proteins induces a complete omission of MI, yielding meiocytes that skip recombination and reductional cell division and directly undergo equational cell division to produce clonal  $2n$  megaspores. Genetic analyses revealed that all these proteins are either involved in the regulation of MI chromosome dynamics [142,143] and histone patterning [144], small RNA-mediated signalling and gene silencing or DNA methylation [140], indicating that meiotic induction and the meiosis-apomeiosis decision is under a strong epigenetic control (extensively reviewed in [73]). All together, these findings demonstrate that alterations in the (epi-)genetic machinery controlling reproductive pathways, such as initiation of meiosis and regulation of meiotic cell cycle progression, may cause meiotic non-reduction (e.g. loss of MI or MII), hence forming a molecular trigger for the formation of  $2n$  gametes capable of conferring sexual polyploidization. However, whether such aberrations have actually contributed to evolutionary relevant polyploidization and speciation events other than induction of apomictic reproduction remains unknown.

### 2.3. Meiotic restitution upon hybridization drives allopolyploid induction and speciation

Many polyploid speciation events involve the intercrossing of two closely or more distantly related species to obtain a stable allopolyploid lineage. At the genomic level, these ‘polyploid hybrids’ benefit both from fixed heterozygosity as well as from chromosome redundancy, providing them an increased genomic flexibility upon which selection can act. Studies in wheat and *Brassica* have also revealed that neo-allopolyploids display rapid and pervasive alterations at the DNA sequence and epigenetic profile level [145–147], including alterations in DNA methylation patterning [148,149], reciprocal translocations [30], insertions/deletions, elimination of low-copy non-coding DNA sequences [150], aneuploidy [151,152] and loss of 5S DNA unit classes [153]. This (epi-)genetic variability and resulting transgressive segregation is thought to provide allopolyploids a strong evolutionary advantage, which may explain their widespread occurrence, in natural as well as agronomic populations. A substantial amount of research has been performed in search of the cellular mechanism(s) underlying allopolyploid origin. The very early maxim of “hybridization followed by genome doubling” put forward by Ö. Winge (1917) was repudiated by (1975) [154], who made the first strong case for the involvement of meiotic mechanisms, and in particular unreduced gametes, in allopolyploid formation events. Subsequently, increasing evidence has supported the role of meiotic non-reduction and sexual polyploidization in F1 hybrids as a major route for allopolyploid formation (comprehensively reviewed by Ramsey and Schemske [54]).

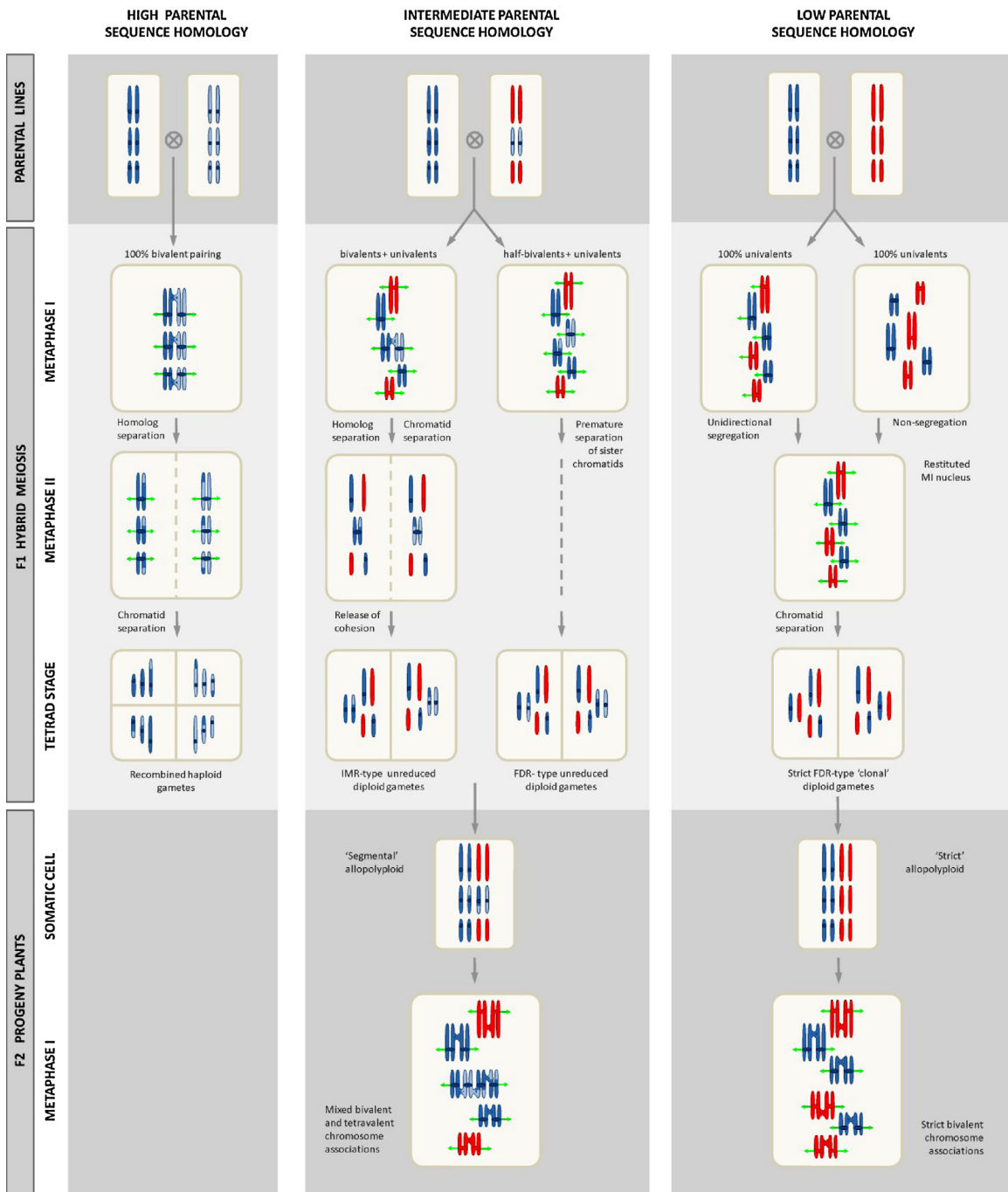
F1 plants resulting from wide hybridization events generally produce non-viable gametes due to instabilities in meiotic chromosome segregation and gametophytic aneuploidy. These F1 meiotic defects typically originate from irregularities in MI homologous chromosome pairing; a process that strongly depends on the sequence similarity of the two parental genotypes [155–157]. If homologous chromosome pairs are not present, as is the case in wide hybridization events (e.g. genome composition AB), pairing of homeologous chromosomes is strongly disrupted and achiasmate univalents instead of recombining bivalents are formed at metaphase I. Due to the absence of bivalent-based bipolarity, univalents segregate randomly at anaphase I, yielding unbalanced MI products that develop into aneuploid gametes [158], similar as in a- and desynaptic mutants and haploid lines [159–161]. Although the induction of gametophytic aneuploidy may occasionally lead to variations in chromosomal structure and copy

number [162], resulting gametes are generally non-viable [158]. Strikingly, despite this meiosis-based gametophytic sterility, F1 hybrids generally still produce a small or sometimes large number of seeds, which in most cases have a duplicated chromosome number [163–166]. Cytological and genotypic analysis of de novo F1 amphipoly- or polyhaploids revealed that this is caused by the induction of meiotic restitution and the associated formation of unreduced gametes [163,167–171]. Importantly, studies in several plant species have revealed that the exact mechanism of meiotic restitution differs by hybrid type, largely depending on the level of homologous chromosome pairing and hence on the relatedness of the original parent lines.

#### 2.3.1. Cellular mechanism of meiotic restitution in F1 hybrids depends on parental genome divergence

In the case of hybridization between two remote genotypes, such as wheat-rye and other cereal wide crosses, resulting F1 hybrids shows a complete lack of pairing and crossing-over, yielding univalents instead of bivalents at metaphase I (Fig. 1). Cytological analysis revealed that these univalents either show a unidirectional segregation to one pole, yielding an asymmetrical dyad composed of one anucleate cell and one cell with a restituted nucleus, or alternatively display chromosome lagging and thus remain positioned at the cell equator [80,164,172]. Alternatively, in some cases, MI shows a retrograde migration of telophase I chromosomes from the poles back to the center of the cell [79]. In all these cases, MI yields a non-reduced diploid cell that progresses through the second meiotic cell division to form a dyad containing two unreduced  $2n$  gametes [173]. Interestingly, studies in *Lilium* interspecific hybrids and haploid *Arabidopsis* have revealed that univalents have the potential to divide equationally during MI, indicating that the complete loss of bivalent formation may convert the double meiotic cell division into a single mitotic one [174,175]. This process is typically referred to as a ‘single-division meiosis’ (SDM) [173,176] or a ‘mitotic-like division’ [169,170]. However, in a strict sense, SDM represents an extreme form of univalent-induced delay of MI chromosome segregation, completely impairing distinction between the two meiotic cell divisions and hence mimicking a mitotic cell division. In support of this, SDM and FDR have often been found to co-exist in F1 amphihaploids [165,173]. Interestingly, a similar type of meiotic restitution also occurs in asynaptic accessions and (poly-)haploid lines that show a complete loss of homolog interaction and bivalent formation [102,164,177,178], indicating that meiotic restitution is directly due to structural alterations in MI chromosome segregation and is not per se caused by genetic defects that alter meiotic cell division. Since in all these cases meiotic restitution involves a complete loss of MI, including both reductional cell division and recombination (FDR-type *sensu strictu*), resulting gametes are genetically identical to the parent and hence generate an autopolyploid version of the original hybrid. Despite their hybrid origin, these so-called strict allopolyploids act as homozygous diploids with strict bivalent chromosome pairing and disomic inheritance, as for example demonstrated in newly formed *Arabidopsis suecica* ( $2x = 26$ ) allopolyploids [179].

In the case of intercrossing two more closely related species that share a certain level of genomic sequence similarity (e.g. homeology), resulting F1 hybrids may also exhibit events of meiotic restitution and  $2n$  gamete formation, albeit at a significantly lower rate compared to hybrids with more divergent genomes [180,181]. From a cytological perspective, the mechanism of meiotic non-reduction is highly similar to the one observed in (amphi-)haploid meiosis, with lagging chromosomes remaining at the MI equatorial cell plate that eventually reconstitute the first meiotic cell division. However, in hybrids with homeologous subgenomes, the genotypic constitution of resulting  $2n$  gametes differs significantly from the ones produced by a strict FDR-type mechanism, as



**Fig. 1.** The impact of sequence homology between parent progenitor genomes on meiotic restitution in their F1 progeny.

pairing and recombination may occur between (some) homeologous chromosomes. This behavior is exemplified by the presence of bivalents and/or multivalents, physically exchanging genetic material, amongst the other non-recombining univalents [63,182,183]. Depending on the exact mode of chromosome segregation and more specifically on the timing of bivalent dissociation, two putative mechanisms of meiotic restitution are possible, each producing  $2n$  gametes that slightly differ in their genetic make-up. In case of a premature loss of bivalent association, for example in a prolonged metaphase I state, both univalents and half-bivalents exhibit an equational cell division, yielding FDR  $2n$  gametes that largely maintain parental heterozygosity, except for the regions that have undergone reciprocal recombination (non-strict FDR). Alternatively, when bivalents maintain chiasmatal links up till

anaphase I and properly attach to the bipolar spindle, meiotic non-reduction typically involves a reductional segregation of bivalents together with an equational segregation of univalents, giving rise to unreduced gametes that do not comply to an FDR-type, but instead are equivalent to a so-called indeterminate (IMR)-type of meiotic restitution [73,174]. Importantly, besides parental genome exchange through homeologous recombination, genetic variability in IMR  $2n$  gametes is also increased by the dissimilar transmission of parental chromosomes [174]. Due to the partial homology of the parental taxa, resulting allopolyploids of both types of meiotic restitution (i.e. non-strict FDR and IMR) show a combination of bivalent and quadrivalent MI chromosome pairing, hence conferring a mixture of di- and tetrasomic inheritance. These polyploids, often referred to as segmental allopolyploids [184], form an

important part of the current natural and agronomic polyploid population, e.g. as shown by several cytological, molecular and genome sequencing studies [152,185–188] providing substantial evidence for the occurrence of both FDR- and IMR-type restitution, including partial homeologous recombination, in allopolyploid plant speciation [29].

All together these findings support the hypothesis that meiotic restitution upon hybridization forms an important driver for allopolyploid origin, and additionally indicate that the frequency and type of meiotic restitution (FDR *sensu strictu*, FDR- and IMR-type) strongly depends on the parental genome constitution, and more specifically on DNA sequence divergence and structural dissimilarities. As a general rule, increasing divergence of the parental genomes progressively hinders homeologous pairing and recombination, inducing FDR- and IMR-type meiotic restitution in meiocytes containing partially divergent genomes and FDR *sensu strictu* when genomes are highly divergent. Although the presented model for allopolyploidization most likely presents an oversimplified view, excluding the role of gene dosage and transcriptional and genetic alterations, the basic principle of hybridization-induced meiotic restitution may constitute a general system explaining allopolyploid origin (strict and segmental) during plant evolution. In support of this, Hunter et al. [189] demonstrated that progenitors of polyploid hybrids show significantly higher genetic divergence than those underlying homoploid hybridization, confirming the notion that parental genome divergence in a hybridization context drives whole-genome duplication and hence allopolyploid speciation.

### 2.3.2. Molecular basis for meiotic non-reduction and 2n gamete formation in F1 hybrids

From a mechanistic point of view, it is suggested that the induction of meiotic restitution and the frequency of its occurrence in F1 hybrids largely depends on the presence of univalents and hence on the lack of pairing caused by sequence non-homology, rather than on specific genetic defects [164]. In support of this, Wang et al. [190] found that F1 hybrids resulting from allotetraploid *T. turgidum* x tetraploid *Ae. tauschii* crosses (yielding ABDD genotypes) do not undergo meiotic non-reduction, whereas their triploid polyhaploid variants (ABD genotype) do, indicating that homologous pairing interferes with induction of meiotic restitution. In agreement with this, induction of pairing and bivalent formation in wheat/rye F1 hybrids, by using wheat parents with single rye chromosome substitutions, caused higher preference for the reductional, meiotic-like pathway, whereas a complete failure of bivalent pairing induces meiotic restitution and 2n gamete formation [191]. Similarly, studies in durum wheat revealed that the univalent-associated induction of meiotic restitution normally occurring in synthetic haploids [164] is impaired in 5D-5B chromosome substitution haploids, due to the induction of homeologous chromosome pairing and bivalent formation (by absence of the *Ph1* locus) [192]. In contrast to this hypothesis, Pignone [193] found that amphihaploid *T. turgidum* x *Ae. longissima* hybrids (ABS<sup>1</sup>, 2n = 21) and the corresponding backcrosses to *T. turgidum* (AABBS1, 2n = 35), which demonstrate a high level of bivalent formation, both exhibit an equational division of univalents, indicating that in some cases genetic factors or other parameters may be involved in the induction of meiotic non-reduction.

As an underlying molecular basis, it has been suggested that increasing deviations in DNA sequence similarity between parental chromosome sets may impair the single strand-based DNA homology search in prophase I, reducing the number of D-loop structures that form a transient interhomolog linkage and that are required for homologous pairing, synapsis and recombination [194,195]. Alternatively, divergence in sequence homology may alter chromatin remodelling capacities during early meiotic stages, hence affecting

the process of pairing and recombination [196,197]. In support of this, studies in wheat-rye hybrids revealed that perturbations in hom(e)ologous chromosome pairing are closely associated with asynchronies in prophase I chromatin condensation and failure in heterochromatin change [198,199] and eventually induce meiotic restitution and 2n gamete formation [172]. Additionally, chemical induction of chromosome condensation has been found to induce homeologous pairing in wheat interspecific hybrids, indicating that a synchronized change in chromatin remodelling is essential for MI reductional cell division [200]. Related to this, Rezaei et al. [201] suggested that meiotic instabilities in triticale are caused by structural differences in parental chromatin configuration, with rye displaying large telomeric blocks of heterochromatin and wheat showing smaller and intercalary band of heterochromatin. Since alignment of meiotic homologues generally initiates from the (sub-)telomeric regions [202], differences in chromatin state may hence impair hom(e)olog recognition and pairing [197], thereby yielding achiasmatic chromosomes capable of inducing meiotic restitution. Alternatively, loss of reductional cell division in F1 hybrids may also result from defects in kinetochore functioning and associated delay in meiotic cell cycle progression or by inactivation of MTs or kinetochores due to structural and/or functional incompatibilities in the amphihaploid MI chromosome set [172]. In support of this, Cai et al. [175] revealed that tetraploid wheat cv. 'Langdon' (LND) displays a syntelic orientation of sister kinetochores at MI, whereas its polyhaploid variant and interspecific hybrids with *Ae. tauschii* display an amphitelic orientation, conferring bipolar segregation of sister chromatids instead of hom(e)ologs. The tension created by this amphitelic orientation of sister kinetochores, together with the persistence of centromeric cohesion up till anaphase II, is thereby suggested to form a mechanistic basis for the onset of 'SDM' meiotic restitution. Moreover, since amphitelic association was only observed in asynapsed chromosomes, Cai et al. [175] suggested that synapsis acts as the predominant factor in determination of MI kinetochore orientation, and as such forms an important structural factor in the decision whether to divide reductionally or equationally. This is in agreement with the observation that a high level of chromosome pairing and synapsis prevents meiotic non-reduction and 2n gamete formation [190]. In support of this, Ressurreição et al. [203] found that the induction of asynapsis in the N5DT5B variant of Chinese Spring wheat (5D nullisomic and 5B tetrasomic, absence of the *Lpt* gene) [204] by low temperatures induces meiotic non-reduction, even when the two homologs are present. These findings provide strong evidence that the absence of synapsis rather than the haploid condition is the key feature switching syntelic to amphitelic kinetochore attachment and eventually inducing meiotic restitution in wheat. Moreover, since N5DT5B shows a reduced level of crossing-over [205], haploidy-dependent induction of meiotic restitution, as for example observed in newly formed F1 hybrids and other amphihaploids, may be directly attributable to defects in synapsis and recombination, typically occurring as secondary effects of alterations in meiotic homo(eo)logous recognition and pairing.

### 2.3.3. Genetic factors promoting F1 hybrid-associated meiotic restitution: lessons from Triticeae

Besides spontaneously occurring meiotic non-reduction, several studies have demonstrated the existence of genetic factors that induce/enhance the level of meiotic restitution upon hybridization. Particularly in the Triticeae tribe, genetic influence of the parents on the genome doubling capacity of resulting F1 hybrids has repeatedly been documented. A recent study of more than 100 types of *T. turgidum* x *Ae. tauschii* combinations revealed a high variability in selfed seed set, reflecting genetic differences in the *T. turgidum* germplasm to induce meiotic restitution [180]. This is in agreement with earlier reports, which demonstrate a high



variability in chromosome doubling capacity of specific tetraploid wheat varieties upon hybridization with *Ae. tauschii* [206,207]. Genetic studies hereby found that the durum wheat cultivar Langdon (LDN) carries a gene for meiotic restitution, causing high frequency FDR and partial fertility in hybrid combinations with rye and *Ae. squarrosa* [208]. Based on observations using LDN durum D-genome disomic substitution lines, Xu and Joppa [209] found that the underlying FDR-inducing gene is most likely located on chromosome 4A, however, the exact gene and underlying molecular mechanism has not yet been identified. Similarly, Zhang et al. [169] found that emmer wheat also induces high level FDR-type meiotic restitution in F1 hybrids with *Ae. tauschii* and that this is controlled by one or more nuclear genes. Although little is known about the function of these *Triticum* ‘meiotic restitution’ genes, the finding that 2n gamete formation is only promoted in an (amphi)haploid background and not in the usual diploid state Zhang et al. [169] suggests that these genes may only function in the partial or complete absence of chromosome pairing.

Interestingly, besides emmer and durum wheat, *Ae. tauschii* also harbors some level of natural variability in its genome doubling capacity upon hybridization with *T. turgidum* [210,211]. Using two representative *Ae. tauschii* accessions, an intensive QTL mapping approach hereby identified six QTLs that positively regulate F1 genome doubling and fertility recovery [212]. Although these QTLs may harbor genes implicated in different reproductive activities, Matsuoka et al. [212] argued that most if not all QTLs are involved in the regulation of meiotic non-reduction, with two QTLs containing putative ‘meiotic restitution’ genes; namely *Taf1* which is involved in female sterility [213] and *Ph2*, which is a suppressor of homeologous pairing. *Ph2* is part of the pairing homeologous (*Ph*) gene system in wheat, which negatively regulates interactions between non-homologous chromosomes (A, B, D, etc.), thereby ensuring diploid-like meiosis and disomic inheritance in polyploid genomes. The *Ph* system consists of a major pairing locus, e.g. *Ph1*, on chromosome 5B [214,215], an intermediate one, e.g. *Ph2*, on 3D [216,217] and several additional minor loci [218,219]. Interestingly, loss of *Ph1* in amphihaploid genome combinations and associated induction of homeologous pairing has been found to reduce the capacity of WGD in corresponding hybrids, whereas its presence significantly enhances meiotic restitution [168,220], indicating that *Ph1* and related genes may be important drivers for F1 amphihaploid meiotic non-reduction and allopolyploid induction. Recently, genetic studies identified *Ph1* as a major regulator of meiotic CDK activity [221–223], with major implications in early MI stage chromatin remodelling and induction of synapsis [196,222,224–226], whereas the intermediate pairing locus *Ph2* positively controls progression of synapsis [227], providing a molecular basis for the regulatory function of *Ph*-related genes in the induction of meiotic restitution and 2n gamete formation.

Recently, studies using haploid variants of wheat-rye substitution lines revealed interesting behaviors related to meiotic restitution. Silkova et al. [228] thereby found that a 6R(6A) substitution induces equational-type division of univalents leading to meiotically restituted dyads, whereas other lines (2R(2D)1 and 2R(2D)3) exhibit a reductional-type of meiotic chromosome segregation. These findings indicate the existence of one or more ‘promotive or suppressive meiotic restitution genes’ on chromosomes 6R and 2R, respectively. In line with this, rye chromosome 2R has already been found to act as a suppressor of meiotic non-reduction in wheat-rye polyhaploids [229]. Although a putative role for the underlying genes in the structural and functional organization of centromeres and associated kinetochore orientation has been postulated, corresponding genes and associated molecular mechanism(s) have not been identified yet. It is possible, however, that both the 6R and 2R genes have an impact on homeologous pairing and recombination,

and hence act as indirect molecular regulators of haploid-induced meiotic restitution, similar to *Ph* in wheat.

All together, these data suggest that loci involved in the suppression of homeologous pairing, e.g. through chromatin remodelling and initiation of synapsis, may be involved in the induction and/or promotion of meiotic restitution and sexual polyploidization in F1 hybrids. However, whether these loci actually operated as genetic drivers of hybrid polyploidization, fuelling allopolyploid speciation, remains unknown. Classically, *Ph1* and related loci are thought to result from mutations occurring after allopolyploid origin, i.e. following hybridization and polyploidization, as a mechanism to stabilize newly formed allopolyploid genotypes by cytological diploidization of meiotic cell division [221]. However, based on the above mentioned observations, one could assume that *Ph1* or other loci suppressing homeologous interaction, were already present in the parental lines and hence significantly promoted sexual polyploidization in newly formed hybrids through the inherent induction of meiotic restitution (e.g. because of absence of pairing). Moreover, since this process directly produces neo-allopolyploids with an inherent suppression of homeologous chromosome pairing, this theory not only implicates an enhanced success rate of allopolyploid origin but also provides a mechanism for reducing adverse meiotic irregularities and genomic instabilities in early stage allopolyploid speciation [25,30,230,231], substantially promoting its fitness and establishment. In support of this, several authors have suggested the existence of *Ph*-like genes in diploid wheat species [182,232,233], thereby postulating that they only became effective in amphihaploid situations as a result of hybridization or polyploidization [234]. Similarly, standing variation for the ability to suppress homeologous recombination in newly formed hybrids has also been reported in *Lilium* diploids [235]. Interestingly, a similar theory has recently been postulated for the origin and evolution of autopolyploids. Based on an extensive genome sequence analysis Hollister et al. [230] found that the *AaASY1* allele, i.e. one of the alleles reducing pairing frequency in *Arabidopsis arenosa* tetraploids [236], occurs at very low frequencies in the corresponding diploid cytotype, indicating that it may have formed a genetic basis for promoting ancient polyploidization events, thereby inherently providing a molecular basis for the diploidization and hence stabilization of autopolyploid meiosis.

#### 2.4. Stress-induced meiotic restitution drives WGD under adverse conditions

##### 2.4.1. Stress-induced meiotic restitution in plants: cellular mechanism and molecular regulation

In flowering plants, the reproductive pathway and particularly the process of male gametogenesis is highly sensitive to abiotic stresses. Indeed, several studies on different types of plants have revealed that adverse environmental conditions, such as heat, cold, drought and salt stress have a detrimental effect on male spore formation and pollen maturation, significantly affecting male fertility and seed set [237]. In most cases, stress-induced male sterility is caused by a precocious or delayed programmed degeneration of the tapetal cell layer, i.e. the surrounding cell layer that nurtures the developing microspores, and associated changes in microspore and pollen homeostasis [238]. Alternatively, under certain stress conditions, male sterility is directly caused by alterations in sugar metabolism, impairing proper energy supply to the developing microspores, and other functional irregularities that lead to a failure of gamete formation and/or fertilization (reviewed in [237]).

Interestingly, despite the overall negative impact of abiotic stress on sporogenesis and reproduction, under certain instances (a)biotic stress alters the process of gametogenesis in such a way that it promotes genetic flexibility and evolutionary adaptiveness of the resulting progeny. More specifically, there is accumulating

evidence that temperature stress, and putatively other stresses, induces or enhances meiotic non-reduction and the associated formation of 2n gametes [239], hence forming a basis for stress-induced sexual polyploidization events. In rose (genus *Rosa*), for example, short periods of heat stress (e.g. 48 h at 36 °C) ectopically induce the formation of parallel and tripolar MII spindles, instead of the normal perpendicular ones, producing dyads and triads that contain FDR-type 2n gametes [240]. These heat-induced changes in MII spindle orientation can be caused by alterations in the structural set-up of MII cell polarity, e.g. through defects in  $\gamma$ -tubulin-based MT organizing centers, or may alternatively rely on changes in the molecular regulation of MII meocyte polarity, e.g. for example through a decreased AtPS1 or JASON functionality [237]. The occurrence of fused, parallel and/or tripolar spindles in male MII has already been described in several plant species, including *Solanum* [241], *Populus* [87,92], *Medicago sativa*, *Impatiens* [242], *Agave* [99], *Lotus tenuis* [243] and *Ipomoea batatas* [86], potentially reflecting a mild form of heat-induced meiotic non-reduction. Moreover, similar to in rose, high temperatures have also been reported to enhance male 2n gamete formation in other species, including *Lotus tenuis* [243], diploid chilli (*Capsicum annuum* L. 'Xianjiao'; 35.5 °C, 4 h) [244] and wheat species [201], suggesting that high temperatures or heat shocks have a general potential to induce sexual polyploidization and WGD, most likely via ps-mediated male meiotic restitution. Interestingly, recent studies in poplar (*Populus* L.) have revealed that heat stress may also affect the reductional character of female meiotic cell division, yielding unreduced megaspores capable of inducing sexual polyploidization [245,246]. Moreover, depending on the timing of the heat treatment (during MI or MII), female sporogenesis either produces FDR or SDR 2n gametes [245]. In all flowering plants, female meiosis exhibits a successive-type of cytokinesis and hence does not depend on specific spindle orientations during MII. Thus, in this case, heat-induced meiotic restitution is not based on MII spindle irregularities, but rather on alterations in cell cycle regulation or cell wall formation. Alternatively, heat-induced 2n gamete formation may result from defects in synapsis and CO and associated failures in bivalent formation, inducing meiotic non-reduction in a similar way as in amphihaploid and asynaptic meocytes. In support of this, both Wang et al. [245] and Lu et al. [246] found that the MI pachytene to diplotene stages comprise the most optimal period for heat-induced restitution of MI in poplar. Additionally, studies in *Allium ursinum* have revealed that high temperatures affect the biogenesis and stability of the synaptonemal complex in early stage prophase I [247], precluding recombination and CO and reducing the number of interhomologous recombination events [248]. A similar reduction in chiasma frequency has been reported in heat-stressed grasshoppers, however, in this case, univalents and the associated induction of meiotic restitution has never been observed [249]. Likewise, mild heat stresses (from 22 to 30 °C) in barley were found to induce spatiotemporal alterations in meiotic axis formation and recombinational protein loading, eventually causing a small but significant reduction in mean chiasma frequency, although without induction of meiotic restitution [250]. These observations all together suggest that heat-induced meiotic non-reduction through asynapsis only occurs under specific conditions, namely in a temperature range that causes complete loss of chiasmata without impairing meocyte viability.

Similar to heat stress, short periods of cold also increase the gametophytic ploidy level, however, the underlying mechanism appears completely different. A recent study in *A. thaliana* revealed that short periods of cold (1–40 h at 4–5 °C) disrupt the final step of meiotic cell division, i.e. post-meiotic cytokinesis and cell wall formation, eventually yielding dyads, triads and monads that contain syncytial microspores [96]. Moreover, since syncytial nuclei fuse before pollen mitosis I and then show a normal progression through

microsporogenesis, this process generates diploid or polyploid pollen, capable of conferring sexual polyploidization. Cytological examination of *Arabidopsis* PMCs revealed that cold stress does not affect meiotic chromosome behavior, as has repeatedly been observed in animal meiosis [251], but instead specifically disrupts the biogenesis of the internuclear radial microtubule arrays (RMAs) at telophase II, which normally function as phragmoplast-like structures that mediate post-meiotic cell wall formation [252]. Accordingly, subcellular localization of organelles and subsequent deposition of callose at developing MII cell plates is impaired, resulting in a partial or complete loss of meiotic cell plate formation. Formation of diploid and polyploid pollen upon exposure to low temperature has also been observed in several other plant species, including Japanese Persimmon (*Diospyros kaki* Thunb.) [253], *Brassica* [254] and *Dasyphyrum* [255]. However, for these species the exact cellular mode of polyploid gamete formation has not yet been resolved. Molecular insights into the mechanism by which cold affects meiotic cell plate establishment may come from observations in a wheat thermosensitive genic male sterile (TMGS) line that shows alterations in MI cell plate assembly upon exposure to low temperature stress (10 °C) [256,257]. Large-scale transcriptomics hereby revealed that cold alters the expression of several key actin regulators and other genes implicated in the dynamic organization of the cytoskeleton, such as actin-depolymerization factor, profilin, formin, villin and LIM domain protein, suggesting that cold-induced defects in meiotic cytokinesis may have a transcriptional basis [257]. Moreover, since formins play a role in meiotic RMA formation [88], these proteins are thought to be one of the primary factors underlying cold sensitivity of meiotic cell plate formation [237]. Generally, in both mitotic and meiotic cells, low temperature stress has a direct negative impact on the stability of microtubules and associated cytoskeletal figures [258,259]. In budding yeast meiosis, this is accompanied by an arrest of cell division and an associated down-regulation of genes required for cell cycle progression, meiotic differentiation and development [260]. Based on this, it is thought that meiotic RMA and phragmoplast structures in plants are structurally more sensitive to cold and that their disintegration causes alterations in meiotic cell cycle progression, including defects in cell plate formation and polynuclear spore formation. Despite the absence of clear underlying regulatory mechanisms, the impact of adverse temperatures on male sporogenesis and the associated induction of sexual polyploidization through 2n gametes constitutes an elegant mechanism to increase genomic flexibility (e.g. polyploidy) as an adaptive mechanism to cope with adverse conditions [96,240]. Whether this process is actively regulated or forms an indirect consequence of structural defects in meiotic cell division still remains elusive and forms an important subject of future studies.

#### 2.4.2. Stress-induced meiotic restitution during plant evolution?

Obviously, the repeated observation of stress-induced formation of 2n gametes in plants triggers the question of whether this process could have driven WGD during plant evolution. Although the precise mechanism(s) inducing ancient polyploidization events are extremely difficult to determine, there is accumulating evidence that stress-induced formation of 2n gametes may have played an important role. Indeed, during the last decade, several phylogenetic and comparative sequence analyses have revealed that ancient WGD events in plants appear clustered in time, and often coincide with periods of dramatic climate changes and catastrophic extinction events. Fawcett et al. [11], for example, reported that the majority of recent genome duplication events, occurring independently in the major plant lineages, coincide with the Cretaceous-Tertiary (KT) boundary ( $\pm 65$  million years ago) [13], representing the most recent mass extinction event caused by extreme global climate changes resulting from volcanic activity

and asteroid impact [261–263]. Similarly, other WGD events during plant and vertebrate evolution have been dated to periods of abiotic stress, including glaciation, global warming and atmosphere cooling [16,264,265]. Although this stress-related ‘evolutionary boost’ of WGD events may simply reflect a selective advantage of the ‘more adaptive’ polyploid lineages [9,266–269] to adverse environments [11,270–272], these observations may alternatively or concomitantly indicate an increased incidence of polyploid origin, e.g. through increased levels of sexual polyploidization. In support of this, recent paleological analysis of *Classopollis* conifer pollen extracted from sediments of the Triassic–Jurassic transition (200 Mya) revealed the presence of aberrant tetrads, dyads, triads and larger pollen grains, indicative of meiotic restitution and  $2n$  pollen formation during the End-Triassic biotic crisis [273]. In a similar way, aberrations in lycophyte spores and conifer pollen have been found to occur during the end-Permian mass extinction event [274,275], indicating that ancient global climate changes are associated with irregularities in reproductive ploidy stability and enhanced induction of sexual polyploidization.

Further evidence supporting a role for stress-induced  $2n$  gamete formation in plant evolutionary WGD events comes from the observation that polyploid lineages are more frequent in habitats affected by climatic and edaphic fluctuations, such as high altitudes and recurrently glaciated areas [189,276]. Although this may again reflect a higher adaptability of polyploid genomes to adverse environments or ecological niches [277], the additional finding that these polyploids have recurrently formed at different scales in time and space [278] and still show evidence of ongoing polyploidization suggests that polyploidization occurs more frequently under conditions of (a)biotic stress. Indeed, both for allo- and autopolyploids, biogeographic and ecological assays point to an association between polyploid induction and environmental change [279]. All together, these findings support the notion that stress-induced meiotic non-reduction in plants may constitute an important driver of evolutionary whole genome duplications and associated events of speciation.

### 3. Somatic polyploidization

#### 3.1. Natural pathways for somatic polyploidy in plants

Whole genome doubling in plants does not only rely on alterations of the meiotic cell cycle, but may also be conferred by somatic ploidy instability [54,181]. Indeed, the ectopic induction of polyploidy in mitotically dividing somatic or reproductive tissues forms an alternative mechanism for inducing WGD in plants. However, whether such ectopic events of ploidy increase actually lead to a stable transgenerational induction of whole genome duplication largely depends on the mode of reproduction and the affected tissue type. In plants with a vegetative mode of reproduction, ectopic genome duplication in tissues required for asexual propagation (stolons, bulbs, rhizomes) may lead to the establishment of stable polyploid lineages. In contrast, in plants that reproduce sexually, only somatic polyploidization events in the L2 layer [280], that gives rise to the reproductive tissues, and in (pre-)meiotic or gametophytic cells, such as micro- and megaspores [281], lead to a transgenerational fixation of polyploidy. Ectopic polyploidization events in other tissue types do provide a temporary increase in ploidy, but are not maintained in the next generation, and as such cannot form a basis for evolutionary WGD events.

In theory, somatic polyploidization in plants can originate from two different mechanisms: endoreduplication and endomitosis. Although both mechanisms confer duplication of genomic DNA content, endoreduplication basically involves an terminal switch from the mitotic G1-S-G2-M cell cycle to repeated cycles of S- and

G-phases, generating chromosomes with multiple sister chromatids (e.g. polytenal), whereas endomitosis is caused by a specific loss of the M phase, yielding cells with a duplicated number of chromosomes [247,282]. Endoreduplication is rather rare in animals but common in plants, and is thought to provide a cellular mechanism for rapid increase of metabolic activity and cell size in specific organ types [283–285]. However, despite its biological relevance, endoreduplication has only in a few cases been reported in reproductive tissues [286]. Moreover, since this only occurred in artificially generated lines (e.g. AP3::FZR OE) and eventually led to an arrest of subsequent embryo development [287], ectopic induction of endoreduplication is most likely not a common mechanism for transgenerational induction of WGD. In addition, ectopic genome doubling through endoreduplication has often been associated with terminal differentiation [284] and cell division arrest and, in more extreme cases, with tumorigenesis and defects in ploidy stability [282], possibly indicating that it constitutes an evolutionary dead end. In contrast, somatic polyploidy through endomitosis does not represent a common plant biological process [288], except for those events occurring in anther tapetum development [289,290], but instead mostly occurs as an ectopic aberrant cell division under special conditions [291], eventually yielding cells with a doubled set of chromosomes. Since these cells behave as real tetraploid or polyploid cells, showing normal mitotic cell division and balanced chromosome segregation [292], endomitosis does not cause developmental aberrations, hence forming a putative basis for whole genome duplication. In support of this, several studies have reported the occurrence of ectopic endomitosis (e.g. by antimetabolic drugs) as a basis for polyploid tissue induction [293,294] and, occasionally, for polyploid progeny formation [295]. In the latter cases, ectopic occurrence of endomitosis specifically occurred in pre-meiotic, meiotic or gametophytic cells, hence yielding diploid and/or polyploid gametes that were capable of performing sexual polyploidization. Based on their mode of formation, diploid gametes resulting from somatic polyploidization events are termed  $2x$  gametes, contrasting with the  $2n$  (unreduced) gametes formed by meiotic restitution [71].

#### 3.2. Cellular mechanisms causing (pre-)meiotic endomitosis and gametophytic ploidy increase

Generally, ectopic induction of endomitosis occurs through alterations in the final steps of mitotic cell division, e.g. in chromosome segregation or in post-mitotic cell wall formation. Indeed, all cellular alterations that impair bipolar chromosome separation after metaphase I or that affect the biogenesis of the internuclear cell wall at the end of mitosis may cause ‘mitotic restitution’, eventually leading to a duplication of the cell’s chromosome number (Fig. 2). Bipolar chromosome segregation during anaphase I largely depends on three factors: (1) intercellular organization of the spindle origins to opposite sides of the cytoplasm; (2) amphitelic attachment of the spindle microtubules to the centromeres through kinetochore functioning [296] and (3) progressive movement of sister chromatids to the spindle poles. Cytological studies in several species have demonstrated that irregularities in one of these processes, such as defects in spindle body duplication in yeast and loss of essential kinetochore components [297,298], causes a complete failure of mitotic karyodivision, yielding polyploid endomitotic cells [299]. In plants, similar defects have been found to induce chromosomal instabilities, including endomitotic polyploidization. However, reported cases have only been observed under artificial conditions (genetic knock-outs and overexpression) and rarely lead to polyploid progeny [134,300].

Subsequent to mitotic chromosome segregation, cytokinesis consolidates the ploidy stability of the cell lineage by generating an internuclear cell wall. In plants, the building of the cell wall

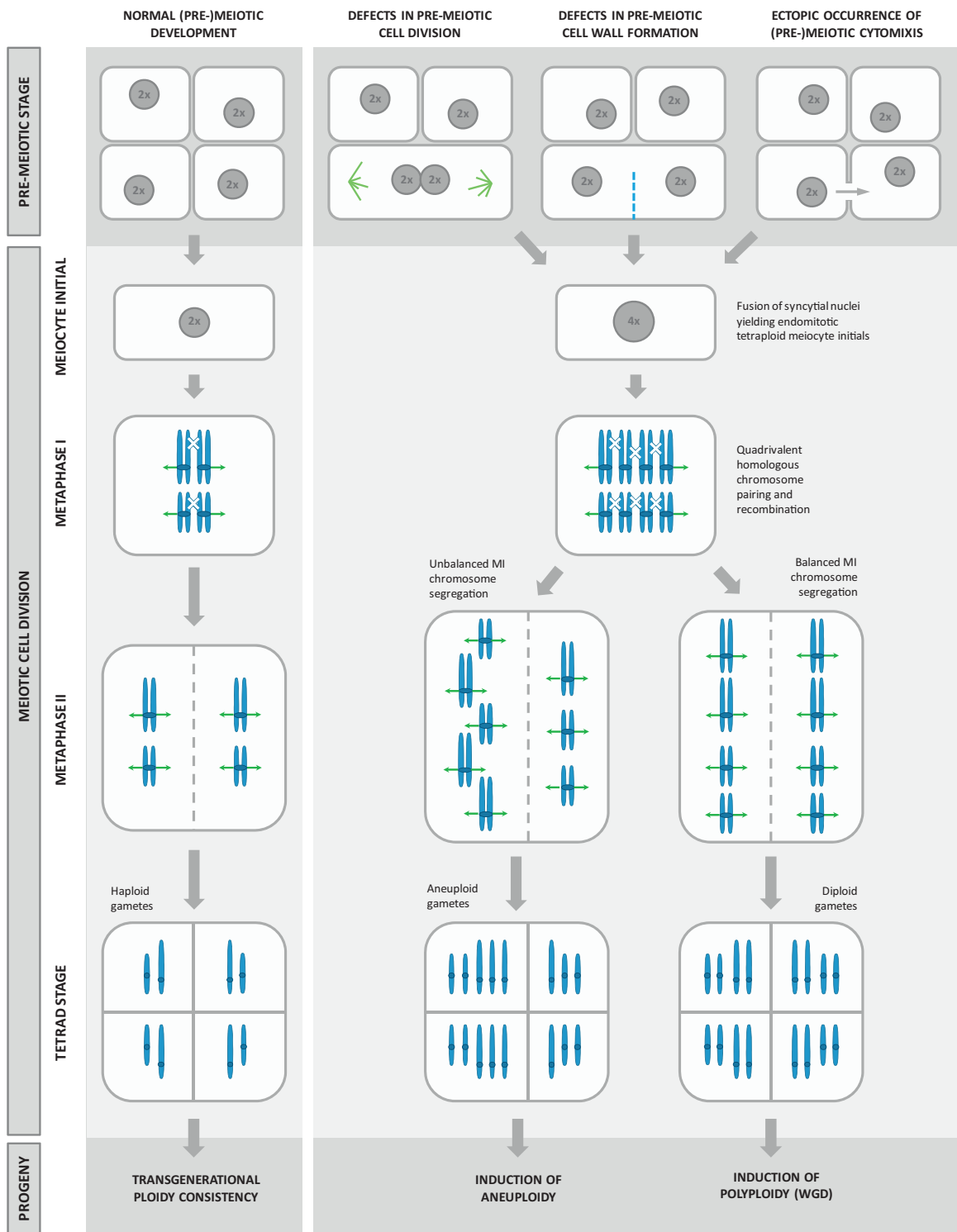


Fig. 2. Mechanisms and outcomes of pre-meiotic endomitosis.

involves many tightly regulated subprocesses, including phragmoplast formation, fusion of Golgi-derived vesicles, callose deposition, etc. [301,302], and alterations in each of these processes have been found to generate syncytial nuclei, that eventually fuse to form polyploid endomitotic cells [303–306]. Studies using *Arabidopsis* mutants have revealed that strong and prolonged defects in somatic cell plate formation typically lead to lethality (apoptosis), most likely caused by developmental irregularities and progressive

genomic instabilities associated with uncontrolled polyploidization. In contrast, when defects in somatic cell wall formation are rather mild and only occur occasionally, associated polyploidization events can be tolerated, eventually yielding chimaeric mixoploid plants [304,306]. Moreover, if such mild defects in cell wall formation occur in reproductive tissues, such as archesporal pre-meiotic or early stage meiotic cells, associated polyploidization events forms a basis for  $2x$  gamete formation and sexual

polyploidization. Indeed, cytological studies in *A. thaliana* and tomato revealed that cytokinetic defects in meiocyte archesporal cells result in tetraploid and sometimes polyploid meiocyte initials that, upon progression through meiosis I and II, yield functional diploid and polyploid gametes, capable of generating polyploid progeny [306,307]. However, in line with the autopolyploid nature of resulting meiocytes, MI often shows multivalent pairing and unbalanced chromosome segregation, typically resulting in a mix of polyploid and aneuploid gametes. As such, ectopic induction of pre-meiotic endomitosis through defects in cytokinesis may form a basis for euploid WGD events, but also for other, rather minor or additional changes in chromosome stability, such as aneuploidy, nullisomy and polysomy [304]. As cytokinesis is a highly regulated process, requiring an intricate interplay between several cellular processes, including cytoskeletal dynamics, cell cycle regulation, vesicle trafficking, lipid metabolism and signalling pathways, a multitude of genetic disorders have been described that affect somatic cell wall formation and associated ploidy stability [308]. However, most of these genetic defects (e.g. *knolle*, *keule*, *hinkel*, *runkel*, *pilz*, etc.) cause early stage lethality [309], whereas only a few result in polyploid meiocytes and sexual polyploidization. For example, *Arabidopsis* loss-of-function mutants for SMT2, a sterol-methyl transferase implicated in structural sterol synthesis, exhibit non-lethal defects in somatic cell wall formation and thereby ectopically form tetraploid meiocytes and diploid gametes in both male and female sporogenesis [306]. A similar phenotype has been observed in the specific *et2* allele of *GSL8*, i.e. a callose synthase required for somatic cell wall establishment, whereas other *gsl8* alleles cause seedling lethality. These findings taken together indicate that specific defects in different processes implicated in wall establishment may form a cellular basis for pre-meiotic endomitosis and associated induction of sexual polyploidization.

Ectopic induction of (pre-)meiotic endomitosis and associated formation of 4x meiocytes and 2x gametes may not only result from defects in mitotic cell division, but can also originate from cellular defects leading to migration of chromosomes from one cell to the neighboring one [310]. This process is generally termed cytomixis and refers to the intercellular transfer of chromatin, single chromosomes or whole chromosome sets (nuclear migration) through cytoplasmic connections or via direct cell fusion. When occurring in meiotic or pre-meiotic cells, cytomixis often leads to erratic meiosis, characterized by defects in chromosome organization and segregation [311–315]. However, occasionally, cytomixis may also result in the formation of stable poly- or aneuploid meiocytes capable of generating functional gametes with an increased chromosome number, hence forming a putative basis for WGD and karyotype change [310,316,317]. In *Chrysanthemum zawadskii* and *C. indicum*, for example, Kim et al. [318] demonstrated that fusion of two adjacent PMCs occasionally occurs early in meiosis I, generating tetraploid meiocytes that proceed through meiosis and that consequently yield diploid pollen. Cytomixis has been described in many species [310,312,316,317,319–321] and is considered a widespread naturally occurring phenomenon, characteristic of both vegetative and generative tissues. Interestingly, cytomixis is most frequently detected in meiotic cells, especially in microsporocytes and never in megasporocytes, and thereby predominantly occurs in meiotic prophase I [313,317,319,320], indicating that the early PMC stage structurally or functionally facilitates intercellular chromatin movement. Preliminary studies in several plants, including *Medicago*, *Chlorophytum* and Himalayan poppy suggest that that process of cytomixis is under genetic control and that in the case of meiotic cells this most likely involves meiosis-specific genes and associated signal transduction pathways [312,314]. However, the exact underlying molecular mechanisms and genetic control systems of cytomixis have not yet been elucidated [322].

### 3.3. Endomitosis and evolutionary speciation

From the perspective of evolutionary significance, several lines of evidence suggest that (pre-)meiotic endomitosis, either through mitotic or cytokinetic defects or cytomixis, may have contributed to evolutionary speciation, either by inducing WGD events or by conferring other changes in chromosomal stability. Firstly, the ectopic formation of tetraploid meiocytes and the associated production of 2n gametes through (pre-)meiotic genome doubling has been observed to occur spontaneously in several crops and natural plant species, including *Aegilops*, Himalayan poppy, *Dactylis*, *Phleum Pratense*, *Medicago*, *Festuca*, *Avena* and rye [310,312,323–328], indicating that it is a naturally occurring phenomenon, capable of conferring sexual polyploidization. Secondly, in some plant species, (pre-)meiotic endomitosis and polyploid meiocyte formation appears strongly correlated with adverse climatic conditions [304,329,330], indicating that somatic ploidy change may act as a stress-induced mechanism, conferring adaptive chromosomal change or polyploidization to cope with (a)biotic stress environments. For example, in interspecific sorghum hybrids, syncytial microsporocytes were only observed under conditions of high temperature and moisture stress and not under more optimal growing conditions [331]. Similarly, in *Lindelfia longiflora* (Royle ex Benth.) (Family: Boraginaceae), sporadic events of PMC fusion and early PMC syncyte formation were only observed upon exposure to low temperatures [332]. Also, in *Salvia miltiorrhiza* PMCs, cytotoxic chromosome migration is more frequent under high temperature conditions compared to under control conditions [320]. Interestingly, studies in *Arabidopsis* revealed that the ectopic induction of endomitotic polyploidy through defects in cytokinesis predominantly occurs in flower organs, and only rarely in vegetative tissues, suggesting that the ploidy stability of reproductive tissues is extremely sensitive to defects in cell plate and cell wall formation [306]. Abiotic stress-induced alterations in plant cytokinesis and cell wall establishment may therefore constitute a cellular pathway for the ectopic induction of WGD in reproductive tissues, thereby representing an alternative mechanism of stress-induced 2n gamete formation and sexual polyploidization. Thirdly, (pre-)meiotic endomitosis and particularly cytomixis have been found to occur more frequently in polyploid lineages and genetically unbalanced plants, such as haploids, aneuploids and hybrids [321], indicating that these phenomena may have driven WGD and other changes in ploidy and chromosome configuration during plant evolution. Conversely, Sidorchuk et al. [319] found that a duplication of the chromosome number increases the frequency of meiotic cytomixis, suggesting that polyploidy enhances cytomixis and not vice versa. However, despite this discrepancy, there is ample evidence suggesting that cellular mechanism inducing somatic endomitosis may have contributed to evolutionary WGD events or other changes in genomic speciation.

## 4. Karyotype change: aneuploidy, dysploidy and chromosome rearrangements

### 4.1. Definitions and overview

Aneuploidy refers to the loss or gain of whole chromosomes, or in a broader sense parts of chromosomes, relative to an established karyotype [333]. Dysploidy on the other hand involves structural changes in the genome that do not result in the loss or gain of genetic information, but that alter the gross chromosome number via chromosome rearrangements [334]. Other chromosome rearrangements such as translocations, inversions, chromosome fusions and breakages may not result in changes in chromosome number and hence dysploidy, but may nevertheless play a role

in speciation events. Chromosome rearrangements are often tolerated where aneuploidy is not: monosomics and nullisomics are often lethal in non-polyploid lineages. Somatic aneuploidy is rarely detected in established plant species, although this may be due to the decreased viability of aneuploid chromosome complements rather than the absence of aneuploid gametes [335,336]. However, aneuploid progeny does commonly result from de novo allopolyploids [333] or triploids [77,337]. Major karyotypic changes such as dys- and aneuploidy can result from alterations in somatic cell division, but in general result from irregularities in meiotic cell division. Meiotic mechanisms inducing both aneuploidy and dysploidy in plants include non-homologous recombination, asynapsis, loss of recombination and chromosome segregation defects [71,162,338], similar to as described in human aneuploidy [339]. Interestingly, the same mechanisms that give rise to unreduced gametes, e.g. through incorrect spindle fibre alignment, asynapsis or defects in recombination, can also result in the exclusion of one or more chromosomes from the resulting nuclei, yielding aneuploid gametes. “Micronuclei” observable post-meiosis are attributable to such excluded chromosomes, either comprising univalents, acentric fragments resulting from non-homologous recombination events or inversion heterozygotes, or “laggard” chromosomes.

#### 4.2. Karyotype change primarily results from non-homologous recombination events

Generally, changes in karyotype configuration primarily result from non-homologous recombination events: interpretations of chromosome fusions, fissions, translocations and inversions are all readily explicable through this single, experimentally validated mechanism [334]. During meiosis, recognition of homologous chromosomes occurs based on DNA sequence similarity, although with elimination of repetitive sequences [156]. Although this is not a new concept, exactly how DNA sequence similarity dictates homolog recognition and the exact cellular mechanisms underlying this recognition process are still unknown [340]. In hybrid genotypes or allopolyploidy genomes, the process of homolog recognition often suffers from the presence of homeologous sequences, e.g. resulting from previous whole genome duplication events and/or sequence diversification. Stretches of ancestrally-related chromosomes (homeologs) or chromosome fragments are often similar enough to initiate pairing and recombination, physically exchanging dissimilar parental sequences or chromosome parts by establishing physical sites of crossing-over (e.g. chiasmata) [341]. Depending on the pre-existing degree of fractionation between ancestral subgenomes (how rearranged homeologous chromosomes are relative to each other) crossover events may thereby form the basis for major or minor chromosome rearrangements.

Different genetic and genomic factors influence the odds of non-homologous recombination and hence putative chromosome rearrangement events occurring. Autopolyploids and allopolyploids, newly formed between closely related species, usually have the highest degree of sequence similarity between hom(e)ologs and hence display a relatively low degree of genome differentiation due to chromosome rearrangements. Indeed, individuals or species with high homeology between chromosomes or subgenomes are predicted to show a greater degree of non-homologous chromosome association than individuals or species with more distantly related subgenomes or chromosomes (see Section 2.3.1). This has been experimentally verified in *Brassica* haploids and hybrids [342,343], confirming the notion that both genome structure [344,345] and presence of additional unpaired chromosomes [346] also affect non-homologous recombination and genome rearrangement.

Genetic control of non-homologous chromosome pairing is also a major factor affecting the odds and rates of chromosomal rearrangements. In allopolyploid bread wheat, the *Ph1* locus effectively prevents non-homologous pairing interactions between closely related chromosomes from the A, B and D genomes [221]. Recent studies have found that *Ph1* comprises a cluster of cyclin-dependent kinase (*Cdk*-like) genes [221,222], and most likely regulates meiotic chromosome dynamics, e.g. homoeolog recognition and pairing, by suppressing *Cdk2*-type activity through the production of defective *Cdk2*-like gene products [223,226]. More specifically, *Ph1* is thought to regulate homolog pairing and synapsis by coordinating chromatin remodelling on both homologous chromosomes [196,200]. In support of this, in allopolyploids, lack of synchronization between homoeologous chromosomes for chromatin conformational changes is thought to reduce the chance of pairing between homeologues [341].

Other genetic loci affecting the frequency of non-homologous chromosome pairing have also been identified in *Brassica* [347–349] and recently in *Arabidopsis* polyploids [231]. However, these genetic loci have a quantitative rather than qualitative effect on non-homologous pairing, and appear to operate differently to *Ph1*. For example, the pairing locus *PrBn* in *B. napus* was found to affect frequency but not distribution of crossover events at meiosis [349], which suggests a different regulation of non-homologous pairing to *Ph1*.

In genera and families with stronger genetic control of non-homologous chromosome pairing, chromosomal rearrangement events may be rarer than in families which are more permissive of non-homologous chromosome associations at meiosis. However, genetic control of non-homologous chromosome pairing is still not well understood. In plants, the only allopolyploid species for which this has been characterized at a molecular level is bread wheat (*Triticum aestivum*) [341], although elucidation of these mechanisms in *B. napus* is ongoing [350]. In the future and with the advent of whole genome sequencing approaches to phylogenetics and ancestral karyotype reconstruction, the relationship between permissiveness of non-homologous recombination and phylogenetic relationships within genera may be elucidated.

#### 4.3. Molecular and cytological mechanisms for aneuploidy

Laggard chromosomes are common in hybrids and new allopolyploids, and may result from differences in progression through the meiotic or mitotic cell cycle between chromosomes belonging to each of the parental subgenomes [351]. In some wide hybrids, such as wheat (*Triticum aestivum*) × pearl millet (*Pennisetum glaucum*) [352], wheat × maize crosses [353] or *Hordeum vulgare* × *H. Bulbosum* [354], chromosome elimination by laggard exclusion occurs rapidly during meiosis or early mitotic divisions, eventually eliminating one complete parental chromosome set. This was hypothesized to occur due to unequal interaction of centromeres from each parent with the mitotic spindle, and the molecular basis of this effect has since been attributed to the action of centromeric histone H3 (CenH3) [161,355]. Loss of CenH3 proteins has since been found to cause centromere inactivation and subsequent chromosome loss, and uniparental genome elimination in newly formed hybrids attributed to cross-species differences in centromeric CenH3 incorporation [356]. In interspecific *Hordeum bulbosum* × *H. vulgare* hybrid zygotes, CenH3 is gradually lost and not replenished in *H. bulbosum* chromosomes over successive mitoses after zygote formation [356], an effect hypothesized to be related to poor synchronization of *H. bulbosum* chromosome replication with the cell cycle [351]. Interestingly, timing of chromatin condensation during chromosome replication is also thought to be the primary mechanism preventing non-homologous chromosome pairing in allopolyploids [226,341], as mentioned previously.

Hence, timing of chromosome replication in each subgenome may constitute the primary means by which chromosome segregation and interactions are regulated in allopolyploids to ensure meiotic stability. CenH3-mediated chromosome loss is also temperature-dependent [351], supporting a common theme of meiotic and mitotic instability in response to stress, potentially providing a source of novel variation for stress escape.

#### 4.4. Somatic aneuploidy

Somatic aneuploidy has rarely been assessed in plants, but may occur naturally in many established species and sometimes in particular tissue types, particularly in polyploid plants. Somatic aneuploidy has been detected in *Arabidopsis suecica* [357], a natural allotetraploid, in potato-tomato hybrids [358] and also in several other crop plant species [359]. Aneuploidy is also commonly induced by tissue culture (reviewed by Damato [360]), and by a number of known chemical and environmental mutagens (reviewed by Sharma [359]). In plants, somatic aneuploidy may occur in undifferentiated tissues that then form generative organs, subsequently resulting in meiotic production of aneuploid progeny. Somatic aneuploidy may also be tolerated at high levels in plants that can reproduce clonally, and chimeric aneuploid sectors may contribute to formation of new plants through vegetative propagation (e.g. tillers or rhizomes).

#### 4.5. The relationship between chromosome rearrangements and speciation

From an evolutionary or phylogenetic perspective, most speciation events appear to involve dysploidy, as these forms of genome change differentiate extant species. Comparative karyotypes between mammals demonstrate this concept readily: overall genome conservation is high across species, but with chromosome fusions, fissions and rearrangements differentiating species karyotypes [361]. Modern molecular, genomic and cytogenetic tools are allowing greater elucidation of historical karyotype rearrangements than ever before. In *Arabidopsis* [362], *Cucumis* [363], *Brassica* [364], *Sinapis* [365], maize, rice, sorghum and *Brachypodium* [366], among others, ancestral karyotypes have been elucidated and divergence between extant species revealed to be the result of chromosomal rearrangements.

However, differences between species as a result of karyotype variation offer purely a retrospective viewpoint: what evidence is there for speciation events occurring as a direct result of chromosomal reshuffling, rather than as a function of species divergence over time? Two different models have been proposed for the role of chromosome rearrangements in speciation events: e.g. the “hybrid sterility” and “suppressed recombination” model [367]. In the “hybrid sterility” model, chromosome rearrangements aid in the reproductive isolation of overlapping populations through reduced fertility in individuals heterozygous for these chromosome rearrangements [367,368]. In the “suppressed recombination” model, suppression of recombination over inversion regions may favor accumulation of locally-adapted alleles within this region, aiding in genetic differentiation of geographically-overlapping populations [368,369]. Chromosome rearrangements distinguishing the karyotypes of two closely related taxa that subsequently hybridize (homoploid hybridization) may also lead directly to genetic isolation of the hybrids from their parent species if backcrosses are subsequently sterile [370]. The role of chromosome inversions in speciation via reproductive isolation has been studied in fruitfly, mosquitoes and butterflies [371] and in models for speciation [372], but is rarely put forward as a primary driving force for speciation in most genera [361]. Meiotic mechanisms such as reduction of recombination between diverged homologous chromosomes have

occasionally been investigated in relation to speciation [373], but overall far less experimental investigation has taken place into the role of chromosome changes in speciation in plants compared to in animals [66,374]. Recent research in *Helianthus* has provided some support for speciation via chromosomal rearrangements and recombination suppression, with genomic regions associated with particular chromosome rearrangements between species also associated with restricted gene flow between these species [375], thereby somewhat contradicting previous research [376]. However, chromosome rearrangements have also been more directly linked to speciation via reproductive isolation in this genus [377]. Dysploidy has also recently been proposed as the most probable cause of speciation in the genus *Carex* [378] although evidence against this citing lack of allelic differentiation between karyotypically diverse *Carex* lines has also been obtained [379]. As such, further research is required to determine the exact role of karyotype change, and in particular the genetic effects of chromosome rearrangements in facilitating speciation events [67].

In the angiosperms, which are now known to have several basal polyploidy events [21], genome redundancy provided by historic polyploidization events can allow for much greater karyotypic variation within species without subsequent loss of fertility [9], as observed in (for example) translocation heterozygotes in allopolyploid *Brassica napus* [380]. If fertility of a translocation heterozygote, i.e. the F<sub>1</sub> between two genotypes differing by a chromosomal translocation, is not significantly reduced, these changes may rarely result in reproductive isolation, at least in polyploid plants. Chromosome rearrangements are the least disruptive to the genome and to absolute gene dosage of all ploidy-related mechanisms for speciation, and differentiate the karyotypes of most extant species. Hence, it is possible that chromosome change plays a cryptic or accessory role in the majority of speciation events.

#### 4.6. Aneuploidy and speciation

Aneuploidy has often been dismissed as a potential factor in speciation and karyotype evolution [381], due to the destabilizing effect on gene expression caused by duplication or deletion of some chromosomal regions of the genome but not others. This may result in altered dosages for genes involved in the same pathways or networks, to potentially detrimental effect [382]. However, aneuploidy may also confer beneficial effects: improved growth and proliferation is often a consequence of aneuploidy in tumors [383] and yeast [384], even if examples in more complex taxa are sparse. Aneuploidy is also frequently observed in nature, generally in plants with polyploid genomes or lineages. Examples include *Tragopogon* [188], *Rutidosis* grasses [385], *Malus* [386] and in the complex *Hieracium* and *Pilosella* lineages [387]. Recently, evidence for complex hybridization and accompanying aneuploidy leading to a new, established species was also obtained in the *Cardamine* genus (Asteraceae) [388]. Aneuploidy can also be an intermediate stage in the establishment of novel euploid karyotypes: *Arabidopsis* triploids give rise to aneuploid progeny that stabilize at either the diploid or tetraploid level after a few generations [77]. Moreover, research in *Malus* also suggests that in some cases aneuploid gametes or cytotypes may have an advantage over euploid gametes or cytotypes, contributing to increased heterozygosity and genetic variation [386]. The higher genome redundancy offered by polyploid genomes may allow greater tolerance of chromosome loss compared to diploid genomes. The prevalence of aneuploidy in interspecific hybrids and polyploids also suggests that this phenomenon may occasionally contribute to the establishment of new karyotypes, as suggested by the few examples of speciation via aneuploidy so far obtained in plants.

#### 4.7. Cryptic aneuploidy in allopolyploids: homoeologous chromosome substitutions

A form of cryptic aneuploidy in new allopolyploids has recently been discovered. This form of aneuploidy, which has been observed in young allopolyploid *Tragopogon miscellus* [188,389] and in resynthesized *Brassica napus* [152] involves loss and gain of closely related homeologs, but with retention of overall homeolog dosage balance. As an example of this dosage compensation effect, for closely related whole-chromosome homeologs A1 and B1, a given plant may retain the expected A1-A1 and B1-B1 homologous chromosomes, or instead have a chromosome complement of A1-A1-A1-A1 (nullisomy–tetrasomy) or A1-B1-B1-B1 (monosomy–trisomy); overall chromosome number and “dosage” of homeologs is retained despite cryptic aneuploidy. The mechanistic basis for this effect is probably related to poor genetic regulation of homeolog recognition, i.e. incorrect separation of homeologs and homeologs by the cell machinery during meiosis [390], coupled with selection for gametes maintaining the correct copy number of homologous and homeologous chromosomes [152]. The formation of tetravalents during meiosis I and subsequent tetrasomic inheritance (distributed inheritance of 0–4 chromosomes from the tetravalent) has been documented in a number of autopolyploid species, including blueberry [391], *Lotus corniculatus* [392], *Heuchera grossulariifolia* [393], *Paspalum simplex* [394] and potato [395]. Partial or intermediate tetrasomic inheritance can also occur (occasional formation of tetravalents), particularly in hybrid species [396]. This dosage compensation mechanism, which rearranges chromosome karyotype without the loss of gene information accompanying other forms of aneuploidy, has been postulated to lead to speciation after karyotype stabilization [32].

#### 4.8. Dispensable, “B” and sex chromosomes

In some species, specific individuals can contain one or more chromosomes that are additional to the species karyotype; that is, not every member of the species will contain these additional chromosomes. These additional chromosomes fall into several broad categories. “B” chromosomes are generally defined as chromosomes that are not present in every individual of a species, do not constitute a duplicate of an existing chromosome in the standard species karyotype (“A” chromosome set), do not recombine with other chromosomes at meiosis and are inherited in a non-Mendelian or irregular fashion (reviewed by Jones and Houben [397]). Although B chromosomes do derive from A chromosomes, the common consensus is that B chromosomes do not generally facilitate evolution or drive speciation events; and in fact are generally detrimental “parasites” on the host genome [398]. Heteromorphic sex chromosomes, generally defined as chromosomes which contain sex-determination loci that do not recombine at meiosis [399], also provide an example of a very specific form of karyotypic variation within species. Interestingly, the evolution of sex chromosomes may comprise a special case of evolution via chromosome rearrangements, whereby sex chromosomes evolve via suppression of recombination (reviewed by Charlesworth et al. [399]). Other kinds of “dispensable” chromosomes that do not fit into the above categories are common in fungi (reviewed by Covert [400]), but have yet to be identified in plants. Further investigation of these phenomena in relation to speciation and with the aid of genome resequencing technologies may lend further weight to the role of dispensable chromosomes in plant speciation.

#### 4.9. Environmental stress can trigger ploidy change

The environment may play a major role in dictating whether and how chromosome rearrangement and even aneuploidy events

can lead to speciation. Firstly, positive or negative selection for particular karyotype changes may occur as a result of environmental factors. These karyotype changes may be either novel, or pre-existing within populations: minor chromosome rearrangements within species are now known to be common as resequencing becomes increasingly accessible, with insertion/deletion (indel) and translocation variation observed between accessions or cultivars in maize [401], rice [402] and *Brassica* [380] and with other species predicted to show similar trends. Environmental selective pressure may operate on karyotypic variation within a species in the same way as on more conventional allelic variation, with a similar potential end point of speciation and reproductive isolation with sufficient divergence. Secondly, karyotype change may also be induced by environmental effects, particularly by affecting non-homologous recombination frequencies [334]. In plants, homologous recombination is known to be affected by both biotic and abiotic factors [403], including ionising and UV radiation [404], temperature and day/night duration [405]. Specific environmental effects on non-homologous recombination rates are largely unknown. However, the hypothetical conservation of mechanisms resulting in both homologous and non-homologous recombination [350] suggests that non-homologous recombination should be similarly affected by environmental conditions, particularly stress. Possibly, karyotype change may be faster under stressful environmental conditions, which would facilitate generation of novel genetic diversity and perhaps even speciation as an escape mechanism. Future studies may lend weight to this speculation.

## 5. Conclusions

Understanding the cytological mechanisms underlying plant speciation events is critical in building correct models for karyotype and genome evolution and informing phylogenetic analysis. Cytological mechanisms underlie and tie together the complex relationship between individual plant genomes, populations and species. As well, knowledge of the effect of environmental variables on underlying molecular mechanisms contributing to chromosome and ploidy change over generations will help us understand and predict how speciation occurs in response to environmental change. Despite increasingly widespread awareness and recognition of the role of whole-genome duplication events and hybridization as critical processes shaping the flow of plant genome evolution [406], there is still a great deal of uncertainty as to the mechanistic processes underlying these phenomena.

In this review we provide a detailed overview of what we now know about sexual and somatic polyploidization in plants, as well as recent developments in understanding the role of dysploidy and aneuploidy in speciation. We cover the three main cytological mechanisms responsible for meiotic restitution: alterations in spindle fibre dynamics, defects in meiotic cell plate formation and omission of the first or second meiotic division; then go on to discuss meiotic restitution in interspecific F1 hybrids as an evolutionary mechanism for allopolyploid speciation, and how this is affected by the degree of relationship between the parental genomes. We discuss genetic control of meiotic restitution events and speculate on how stress-induced meiotic restitution can drive sexual polyploidization under adverse conditions. Up to date information on molecular and cytological mechanisms and stress responses in promotion of somatic polyploidization, aneuploidy, dysploidy and chromosome rearrangements are discussed, and we show how these lesser-known processes may contribute to speciation.

Not only are mechanistic constraints on karyotype and genome evolution often disregarded, as put forward by Schubert and Lysak [334], but terminology such as “whole genome duplication



events” is often used to gloss over our lack of knowledge of the potentially long and complex processes involved in speciation via chromosome change, polyploidy and interspecific hybridization. Greater awareness of the types and underlying mechanisms that are responsible for these speciation “events” may aid researchers at the cutting edge of genomics and phylogenetics to entertain more complex hypotheses and identify genomic clues relating to the evolutionary history of extant species. For example, chromosomal rearrangements and fragment loss commonly co-occur with meiotic restitution mechanisms in hybridization events between closely-related species. Hence, cryptic allopolyploidy may be the cause of any “bursts” of chromosome rearrangements observed in genomes over evolutionary timescales. Divergence times and subsequent allopolyploidization events between species may also be assessed in light of knowledge related to chance of genomic rearrangements vs. ease of meiotic control in allopolyploids with greater divergence between subgenomes [407]. Greater attention may also be paid to the potential role hybridization without accompanying genome doubling and of chromosome rearrangements in providing functionally adaptive variation and facilitating speciation via specialization to different ecological niches within a population [69,368].

Meiotic restitution, aneuploidy, chromosome rearrangements and somatic doubling all constitute cellular mechanisms that may originate ploidy change, particularly in response to stress. These mechanisms may all be co-opted as a means for adaptive speciation in response to changing environments, either by providing novel combinations of parent genetic variation as a resource for further environmental selection or by producing transgressive phenotypes through generation of novel genetic, genomic and epigenetic variation. Interestingly, a great deal of accumulated evidence is now suggesting that the meiotic and mitotic cell cycles are indeed highly vulnerable to environmental factors, as we discussed previously. Hence, these mechanisms may facilitate diversification and even allow “emergency speciation” in response to environmental stresses. Further research linking molecular mechanisms to cytological behavior to genome evolution and speciation at the population and environmental level will be needed to fully elucidate the complex interactions leading to these proposed effects.

With the advent of high-throughput molecular genetics and recent advances in DNA sequencing technologies, the time is ripe for experimental investigations into the cellular and molecular origin of plant speciation events [408]. Genomic signatures of cryptic hybridization or genomic introgression events [409], complex evolutionary histories of extant species [388] and the underlying bases for meiotic stabilization in novel polyploid species [31,410] may all become amenable to interrogation. Coupled with recent advances in our understanding of the molecular and cytological mechanisms underlying ploidy change, and the effects of the environment on these important speciation processes, the future holds promise for a deep understanding of how speciation processes shaped the world around us.

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