

# Chloroplast microsatellites: measures of genetic diversity and the effect of homoplasy.

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1	Chloroplast microsatellites: measures of genetic diversity and the effect of homoplasy			
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#### 16 Abstract

Chloroplast microsatellites have been widely used in population genetic studies of 17 conifers in recent years. However, their haplotype configurations suggest that they could 18 19 have high levels of homoplasy, thus limiting the power of these molecular markers. A coalescent-based computer simulation was used to explore the influence of homoplasy on 20 measures of genetic diversity based on chloroplast microsatellites. The conditions of the 21 22 simulation were defined to fit isolated populations originating from the colonization of one single haplotype into an area left available after a glacial retreat. Simulated data were 23 compared with empirical data available from the literature for a species of *Pinus* that has 24 expanded north after the last glacial maximum. In the evaluation of genetic diversity, 25 homoplasy was found to have little influence on Nei's unbiased haplotype diversity  $(H_e)$ 26 while Goldstein's genetic distance estimates  $(D_{sh}^2)$  were much more affected. The effect 27 of the number of chloroplast microsatellite loci for evaluation of genetic diversity is also 28 discussed. 29

#### 31 Introduction

Microsatellites, or simple sequence repeats (SSRs), are sequences of repetitive DNA 32 where a single motif consisting of one to six base pairs is repeated tandemly a number of 33 times. Microsatellite sequences have been identified in the three eukaryote genomes: 34 nucleus, chloroplast (Powell et al., 1995) and mitochondria (Soranzo et al., 1999) 35 Nuclear microsatellite loci are usually highly polymorphic with alleles varying in the 36 number of repeat units; they are codominant and inherited in a mendelian mode. These 37 characteristics, plus being considered selectively neutral, have made them a popular 38 39 marker for population genetic studies (Sunnucks, 2000). With respect to the organelle genomes, mitochondrial microsatellites have had little impact so far, but chloroplast 40 microsatellites have been increasingly used in population genetics since their discovery. 41 42 Conserved primers for the amplification of chloroplast microsatellites (cpSSRs) have been reported for conifers (Vendramin et al., 1996), gramineae (Provan et al., 2004) and 43 dicotyledons (Weising & Gardner, 1999), but it is among conifers, for studies of 44 population genetics, that chloroplast microsatellite markers have mainly been used (e.g. 45 Cuenca et al., 2003; Fady et al., 2003; Gómez et al., 2003). 46

47

Chloroplast microsatellites typically consist of mononucleotide motifs that are repeated eight to fifteen times. Levels of polymorphism in cpSSRs are quite variable across loci and across species, and some loci have been found to be monomorphic in all species studied. There are two important features that differentiate chloroplast from nuclear microsatellites. First, chloroplasts are uniparentally inherited. Some species have maternal inheritance of the chloroplast, others paternal. This means that cpSSRs provide information for the lineages of only one of the sexes. Also, the chloroplast chromosome
is a non-recombinant molecule and, therefore, all cpSSR loci are linked. The genotyping
of cpSSRs will result in haplotypes that will be composed of the combination of alleles
found at each cpSSR locus.

58

Mutation rates for length variation in microsatellites have been found to be higher  $(10^{-2} \text{ to})$ 59 10<sup>-6</sup>) than point mutations rates (Li et al., 2002). In order to explain this difference two 60 kinds of mutational mechanism have been proposed: replication slippage (Tachida & 61 Iizuka, 1992) and recombination with out-of-phase aligning (Harding et al., 1992). Both 62 processes result in changes in the number of repeat units which is compatible with the 63 observed size polymorphism of microsatellites. One consequence of these mutational 64 65 mechanisms is that the same genetic state (i.e. number of repeats) may evolve in two different microsatellite lineages through independent mutational events, a phenomenon 66 known as homoplasy. 67

68

Homoplasy may cause problems in population genetic analysis as it can affect measures 69 of genetic diversity, gene flow, genetic distances (both between individuals and 70 populations), neighborhood size, assignment methods and phylogenetic analysis (see 71 Estoup *et al.*, 2002 for a review). Homoplasy within cpSSRs is considered as a potential 72 73 limitation for its use as a genetic marker (Provan *et al.*, 2001), however the problem has only been addressed at the genus level (Doyle *et al.*, 1998; Hale *et al.*, 2004). Researchers 74 have generally considered homoplasy levels low enough to allow population genetic 75 76 analysis, and even when homoplasy has been evident (i.e. a haplotype network with up to nine loops) it has been considered as "moderate" and its potential for confounding results
disregarded (Cuenca *et al.*, 2003).

79

80 In the present study, simulation analysis was used to investigate the evolution of cpSSRs in conifers and how homoplasy may influence the informativeness of these markers. 81 Instead of a more traditional simulation approach where the whole population is 82 83 considered, only the genetic makeup of a sample of individuals was studied, following a coalescence-based approach. The strategy consists of: first, generating a genealogy for a 84 sample of individuals from the last generation; and second, placing random mutations on 85 the genealogy to generate the genetic state of the sample (Hudson, 1990). This approach 86 has proved useful for the study of levels of homoplasy in nuclear microsatellites under 87 88 different mutational models (Estoup et al., 2002).

#### 90 Modelling chloroplast microsatellite evolution

#### 91 Simulation of Coalescent Events

The probability of a coalescent event for any two lineages in a given generation depends on the population size, the population structure and the mating system. Thus, it became necessary to establish the biological scenario of the simulation, which would determine the shape of the genealogy.

96

After the last glacial maximum most conifer distributions shifted northward leaving their 97 98 refugia (Jackson et al., 2000). When populations were established, they had a period of expansion followed by a period of approximately constant population density until the 99 present time (MacDonald & Cwynar, 1991). Our simulations reproduced populations 100 101 under such conditions. A range of population ages (i.e. coalescence times) were investigated with population origins at 50, 100, 150, 200 or 250 generations before the 102 103 present to simulate colonization events at different stages of the glacial retreat [assuming: 104 1 generation=100 years (as in Provan et al., 1999) and the last glacial maximum=20 000YBP (Hewitt, 1996)]. Population growth was determined by the logistic equation: 105

106 
$$N_{t+1} = N_t e^{r\left(1 - \frac{N_t}{K}\right)} (1)$$

where  $N_t$  is the population size in the generation t ( $N_0=1$ ), r is the population growth rate and K is the carrying capacity of the population. This model has been widely employed to describe population growth following colonization events (Shigesada & Kawasaki, 1997). The growth rate was set at r=0.7, producing a period of expansion with a duration of 22 generations (~2200 years), which is within the range observed for *Pinus* (MacDonald & Cwynar, 1991). Then, population size remained constant at carrying capacity for the remaining 28, 78, 128, 178 or 228 generations. Because effective population sizes are considered to be "large" in forest trees (Muona & Harju, 1989), carrying capacity was arbitrarily set at K=10~000; a size big enough to avoid the effects of genetic drift (Savolainen & Kuittinen, 2000).

117

Generally, chloroplasts are considered paternally inherited in conifers, although there is a 118 possibility that low levels of maternal leakage and heteroplasmy may be present (Cato & 119 Richardson, 1996). Thus, the coalescent process influencing the genealogy of chloroplast 120 haplotypes was considered to be the simplest case possible: a neutral, haploid, non-121 recombinant genome with every individual having the same probability of being the 122 parent of any individual in the following generation. With the demographic history 123 determined, the genealogy was constructed using a generation-by-generation algorithm. 124 This type of algorithm allows the simulation of complex demographic and dispersal 125 models, contrasting with other coalescence algorithms which are faster for computational 126 time (Leblois *et al.*, 2003). 127

128

The algorithm worked backward in time, starting with the last generation and finishing in the first one (*t*=0). In every generation the coalescent events were generated by an algorithm that assigned to every individual, *x*, from the sample ( $x \in [1,..., n_t]$ ) in generation *t*, its ancestor, *y*, in the previous generation *t*-1 (Fig. 1). Every individual *x* from the sample in generation *t* had a probability  $P=n_{t-1}/N_{t-1}$  (where  $n_{t-1}$  is the number of ancestors already assigned and  $N_{t-1}$  is the population size in generation *t*-1) to share its ancestor *y* with any of the individuals from the sample which ancestors had already been

assigned. A random number, 0 < R < 1, drawn with a uniform probability distribution 136 function, is used to determine the occurrence of a coalescent event. When  $R < n_{t-1}/N_{t-1}$ , the 137 138 ancestor y of the individual x is within the  $n_{t-1}$  previously assigned ancestors ( $y \in [1, ..., n_t]$ ]). In order to determine which ancestor, y took the value of the integer part of  $1+R\cdot N_{t-1}$ 139  $(int(1+R\cdot N_{t-1})\in [1,..., n_{t-1}]$  when  $R < n_{t-1}/N_{t-1}$ ). The generation and lineages involved in this 140 coalescent event were recorded to construct the genealogy of the sample. When  $R > n_{t-1}/N_t$ 141 142 1, the ancestor y was a new individual and y took the value  $n_{t-1}+1$ ; for the next individual x+1 the value of  $n_{t-1}$  increased by one unit. 143

144

Coalescent events were simulated using this algorithm on every generation until all 145 lineages converged to a single lineage. Because the population size in the first generation 146 147 (t=0) is only one individual ( $N_0$ =1) the probability for any number of individuals to share their ancestors was  $P=n_{t-1}/N_{t-1}=1$ , i.e. all the lineages coalesced at least at the first 148 generation. This allowed controlling the coalescence time within the range of time for the 149 150 phenomenon simulated (i.e. colonization after glacial retreat). It is important to note that due to the non-recombinant nature of the chloroplast genome all cpSSR loci were linked 151 and shared the same genealogical history. 152

153

#### 154 Simulation of Mutational Events

Several theoretical mutational models have been proposed to describe microsatellite evolution, each one of them with recognized weaknesses and strengths (Estoup & Cornuet, 1999). All of them refer to, and have been tested against, nuclear microsatellites, where mutational events are believed to occur by two mechanisms: replication slippage and recombination (Li *et al.*, 2002). To our knowledge, no specific model has been developed for cpSSRs (where no recombination occurs) so the stepwise mutation model (SMM) was chosen since it is the simplest realistic model for microsatellites. Mutation rate estimates for cpSSRs are scarce and vary from  $10^{-3}$  (Marshall *et al.*, 2002) to  $10^{-5}$ (Provan *et al.*, 1999) per locus per generation, so simulations were run under four different mutation rates:  $10^{-3}$ ,  $5 \times 10^{-4}$ ,  $10^{-5}$  per locus, per generation.

165

The genetic state of nine cpSSR loci in samples of 25 individuals was simulated under 20 different combinations of population ages and mutation rates (Table 1). For each of these simulations 20 replicates were run. The output of every replicate consisted of the genotypic information of all the individuals from the sample and the genealogical tree that describe their relationships, with information on the number of mutations and number of generations for every branch. The raw data obtained was analyzed as described in the following section.

#### 174 Genetic diversity analysis

The effect of homoplasy was studied on a number of standard measures of genetic diversity for cpSSRs: total number of haplotypes, N (direct count of different haplotypes); effective number of haplotypes,  $N_e$  (reciprocal of the chance that two randomly chosen alleles are identical); unbiased haplotype diversity,  $H_e$  (Nei, 1978), and average genetic distances among individuals,  $D_{sh}^2$  (Goldstein *et al.*, 1995) applied to cpSSRs by Morgante *et al.* (1998):

181 
$$N_e = 1 / \sum_{h=1}^{N} p_h^2$$
 (2)

182 
$$H_e = \left[\frac{n}{n-1}\left(1 - \sum_{h=1}^{N} p_h^2\right)\right]$$
 (3)

183 
$$D^{2}{}_{sh} = \frac{2}{[n(n-1)]} \cdot \frac{1}{L} \cdot \sum_{i=1}^{n} \sum_{j=i+1}^{n} d_{ij}^{2}$$
 (4)

184 
$$d_{ij} = \sum_{k=1}^{L} |a_{ik} - a_{jk}|$$
 (5)

185 where *n* is the number of individuals in the simulated sample,  $p_h$  is the relative frequency 186 of the  $h^{th}$  haplotype, *N* is the number of different haplotypes in the simulated sample, *L* is 187 the number of loci simulated,  $a_{ik}$  is the size (measured in repeat units) of the allele for the 188  $i^{th}$  individual and at the  $k^{th}$  locus, and  $a_{jk}$  is the size of the allele for the  $j^{th}$  individual and 189 at the  $k^{th}$  locus.

190

Indices N,  $N_e$  and  $H_e$  were calculated both for the stepwise mutation model (SMM; where haplotypes were defined by their genetic state) and for the infinite allele model (IAM; where every mutation defined a new haplotype, even if the haplotype produced was already present in the sample). The difference between the SMM and IAM valuesrepresents information about genetic diversity that is lost due to homoplasy.

196

Estoup *et al.* (2002) defined an index of homoplasy, *P*, to quantify theoretically the effects of mutational and population variables on homoplasy. This index of homoplasy is the probability that two haplotypes sharing the same genetic state are not identical by descent. We have calculated a similar index generated from Nei's genetic diversity for the SMM and IAM:

202 
$$P = 1 - \left(\frac{1 - H_{eIAM}}{1 - H_{eSMM}}\right)$$
 (6)

203 The number of mutations occurring between every pair of lineages was scored and the average genetic distance, based on number of mutations  $(D^2_M)$ , was calculated following 204 Equation (4) where  $d_{ij}$  is substituted for the number of mutations scored between the 205 individual *i* and *j*. Due to the possibility of recurrent mutation and back mutations under 206 the SMM, the genetic distance estimate is expected to be incongruent to some degree 207 with the actual number of mutations between lineages. The differences between the 208 absolute values  $D_{sh}^2$  and  $D_M^2$  were compared. In addition, the correlation of the matrices 209 210 of actual and estimated genetic distances was analyzed with a Mantel test (Mantel, 1967) when the difference between  $D_{sh}^2$  and  $D_M^2$  was large. 211

#### 213 **Results and discussion**

214 The results for all the simulations are presented in Figures 2 and 3. Each of the 20 replicates performed for each simulation is equivalent to an independent random 215 216 sampling from the same population. Hence, for any of the genetic diversity indices, the mean value for the 20 replicates is interpreted as an estimate for the actual population 217 value of that statistic and the standard deviation as the error associated to the sample size 218 used. The effect of sample size was assessed by performing some simulations with larger 219 sample sizes. Not surprisingly this resulted in a reduction of the variance for the different 220 measures; for instance, gene diversity in simulation 16 ( $H_{eIAM}$ =0.552±0.178; 221 *H<sub>eSMM</sub>*=0.542±0.178 for 25 individuals, as shown in Figure 3G; *H<sub>eIAM</sub>*=0.561±0.037; 222  $H_{eSMM}$ =0.553±0.036 for 1000 individuals) and average genetic distance in simulation 20 223  $(D_{sh}^2=1.665\pm0.382; D_M^2=2.746\pm0.706 \text{ for } 25 \text{ individuals, as shown in Figure 3H};$ 224  $D_{sh}^2=1.696\pm0.185$ ;  $D_M^2=2.589\pm0.292$  for 1000 individuals). The effect of the sample size 225 could be eliminated by simulating the coalescent history for the whole population. 226 However that would require excessive computational time, and it does not appear to be a 227 problem warranting this. 228

229

As was expected, the simulations with parameters that produced higher genetic diversity also showed higher levels of homoplasy (see Table 1 and Fig. 4). For simulations with mutation rates higher than 10<sup>-4</sup>, homoplasy caused an underestimation, to different degrees, for the four diversity indices. However, Nei's haplotypic diversity values for SMM and IAM were very close in all simulations.

236 In order to understand the effect of homoplasy on Goldstein's genetic distance estimates, a more complex approach is necessary. A difference between the values of  $D_{sh}^2$  and  $D_M^2$ 237 will lead to an underestimation of the absolute time of coalescence for that sample. 238 239 However, the actual and estimated distances between individuals could be correlated, and if that were the case, then the distance estimates could be used, or even corrected, to 240 study relative genetic distances. In order to test that correlation, simulation 20 was chosen 241 as it presents the biggest differences between estimated and actual distances. The Mantel 242 test performed for the correlation of the actual and estimated genetic distance resulted in 243 a significant correlation (*p*-value < 0.025) for all the replicates, with the correlation 244 coefficient, r, ranging from 0.52 to 0.82. Since the correlation with the actual genetic 245 distances is significant but not predictable, we conclude that, for populations with high 246 genetic diversity, the Goldstein's genetic distance estimates can be misleading, and any 247 attempt to apply a correction to these estimates would be prone to error. 248

249

The different effect of homoplasy on the various indices is explained by the nature of 250 these indices. The three indices based on the number of haplotypes  $(N, N_e \text{ and } H_e)$  seem 251 to perform better for assessing levels of genetic diversity than the one based on distance 252 estimates  $(D^2_{sh})$ . Estimated distances are influenced by every parallel mutation and back 253 mutation; however, these mutations may have no influence in the number of haplotypes 254 255 in the sample. For example, two lineages with unique and parallel mutations will have two distinct haplotypes at the final generation, thus the number of haplotypes will not be 256 reduced. However, the genetic distance will be underestimated because of the parallel 257 258 mutations. Within the indices based on number of haplotypes, the indices that consider their frequencies ( $N_e$  and  $H_e$ ) were less affected by homoplasy. This result is due to the low frequency that most of the homoplasic haplotypes had within the simulated populations.

262

In the present work, methods for phylogenetic reconstruction have not been assessed. However, our results discourage the use of cpSSR to infer phylogenetic relationships. For instance, in simulation 20, the high occurrence of homoplasic mutations (78.8% parallel mutations and 6.4% back mutations) would make parsimony method useless. There would be an effect on distance methods too, because distance estimates are affected by homoplasy. However, further work would be necessary to estimate rates of error.

269

The number of cpSSR loci studied also influenced levels of homoplasy. A set of simulations performed for four loci produced higher values for the homoplasy index, *P*, and higher differences between expected and actual average distances than the equivalent simulations performed for nine loci (Fig. 4). Thus, the linkage of cpSSRs can be seen as beneficial for the analysis of genetic diversity. With a greater number of loci analyzed one has more power to distinguish haplotypes with homoplastic alleles at a given cpSSR loci through the polymorphism of linked loci.

277

Mutation rate and time of coalescence are the two factors influencing the levels of genetic diversity our simulations. The different combinations of these parameters produced a broad range of genetic diversity, from simulation 01 with null diversity to simulation 20 with the highest diversity (see Fig. 2 and 3). This set of simulations reproduces the

282 simplest scenario that could describe the recent history of a conifer population: an isolated population originating from a single colonization event, followed by a population 283 expansion. The recent population history of *Pinus resinosa* would seem to be consistent 284 285 with such conditions. During the last glaciation P. resinosa was restricted to southern refugial populations and has colonized northern areas after the glacial retreat (Fowler & 286 Morris, 1977). A study of the population genetics of P. resinosa with cpSSRs also 287 supports a metapopulation with restricted gene flow between populations (Echt et al., 288 1998) This case provides us with an empirical study of a conifer with isolated populations 289 290 and with different colonization ages (either because of the metapopulation dynamics or colonization after glacial retreat). Also, the number of cpSSR loci and sample sizes (nine 291 loci, 21-24 individuals) were similar to the simulations presented here, providing an 292 293 appropriate combination of conditions for comparison.

294

The patterns of genetic diversity found in the empirical study of *P. resinosa* with cpSSRs (Echt *et al.*, 1998) can be best compared with simulations 11-15. In both cases the populations are composed of one high frequency haplotype (the ancestral haplotype in the simulations) plus several low frequency haplotypes. The diversity levels for the different indices, *N*,  $N_e$ ,  $H_e$  and  $D^2_{sh}$ , are also comparable and consistent. Therefore, we can argue that the genetic diversity and distances were unlikely to have been underestimated within *P. resinosa* (see Fig. 2E, 2F, 3E and 3F).

302

303 Any further comparison of our simulations with other conifer species studied with 304 cpSSRs has to be done with caution. The simulations we have performed do not take into account a number of additional factors that may influence homoplasy. Thus the current set of simulations will represent the minimum amount of homoplasy that could be present within a given population. Demographic scenarios including migration or more ancient coalescent events (where colonization events were produced by more than one haplotype), would result in increased levels of homoplasy. Higher mutation rates and size constraints in the mutational model will also increase the levels of homoplasy (Estoup *et al.*, 2002).

312

To conclude, further simulation studies would be beneficial for the understanding of the 313 homoplasy in the analysis of cpSSRs. In particular, we are now working in the 314 implementation of the generation-by-generation algorithm for the simulation of multi-315 316 population scenarios with dispersal that will allow us to understand the effects of homoplasy in the measurement of gene flow and genetic distances among populations. 317 318 Regarding future empirical studies with cpSSRs, it is strongly recommended that studies 319 use as many cpSSR loci as are available in order to reduce the negative consequences of homoplasy on estimations of genetic diversity. In order to assess levels of genetic 320 diversity Nei's index seems to perform the best, being least affected by homoplasy. In 321 contrast conclusions made with Goldstein's genetic distances should be regarded with 322 caution, as these can underestimate absolute distances. 323

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Fig. 1 Coalescence events were simulated with a generation by generation algorithm. This algorithm assigned to every individual, x, of the generation t, its ancestor in the immediately previous generation, t-1. The probability for this ancestor to be shared with another individual was calculated from the population size in the previous generation,  $N_t$ . 1, and the number of ancestors already assigned,  $n_{t-1}$  (see text for details).

**Fig. 2** Number of haplotypes, *N*, and effective number of haplotypes,  $N_e$ , for the 20 simulations. Each graph represents the values for one of the indices, *N* or  $N_e$ , for the five simulations with the mutation rate,  $\mu$ , shown on the left and the coalescence time (in number of generations) shown on the abscissa axis. The mean and standard deviation (from 20 replicates) is shown for each simulation. Both indices were calculated under the stepwise mutation model (SMM) and the infinite allele model (IAM). The difference between both values represents the extent to which information is lost due to homoplasy.

Fig. 3 Unbiased haplotype diversity,  $H_e$ , and average genetic distances among 440 individuals,  $D^2$ , for the 20 simulations. Each graph represents the values for one of the 441 indices,  $H_e$  or  $D^2$ , for the five simulations with the mutation rate,  $\mu$ , shown on the left and 442 the coalescence time (in number of generations) shown on the abscissa axis. The mean 443 and standard deviation (from 20 replicates) is represented for each simulation.  $H_e$  was 444 calculated for the stepwise mutation model (SMM) and the infinite allele model (IAM). 445  $D^2$  was calculated for estimated distances  $(D^2_{sh})$  based on the number of observed 446 mutations and for the true distances based on the actual number of mutations  $(D_M^2)$ . The 447 difference between both values represents the extent to which information is lost due to 448 449 homoplasy.

Fig. 4 Levels of homoplasy plotted against genetic diversity for every replicate of the 20 simulations (see Table 1 for simulation conditions). Levels of homoplasy are represented: (A) with the homoplasy index, *P*, and (B) with the difference between the actual average genetic distance  $(D_M^2)$  and the estimated genetic distance  $(D_{sh}^2)$ . Filled circles represent simulations with nine loci and empty circles represent equivalent simulations with only four loci.

	Coalescence time <sup><i>a</i></sup>	Mutation rate, $\mu$	Homoplasy index, P <sup>b</sup>
Simulation 01	50	10-5	0.00
Simulation 02	100	10 <sup>-5</sup>	0.00
Simulation 03	150	10 <sup>-5</sup>	0.00
Simulation 04	200	10 <sup>-5</sup>	0.00
Simulation 05	250	10 <sup>-5</sup>	0.00
Simulation 06	50	$10^{-4}$	0.00
Simulation 07	100	$10^{-4}$	0.00
Simulation 08	150	$10^{-4}$	0.00
Simulation 09	200	$10^{-4}$	0.00
Simulation 10	250	$10^{-4}$	0.00
Simulation 11	50	$5 \times 10^{-4}$	0.01
Simulation 12	100	$5 \times 10^{-4}$	0.03
Simulation 13	150	$5 \times 10^{-4}$	0.03
Simulation 14	200	$5 \times 10^{-4}$	0.07
Simulation 15	250	$5 \times 10^{-4}$	0.17
Simulation 16	50	10-3	0.02
Simulation 17	100	10 <sup>-3</sup>	0.06
Simulation 18	150	10-3	0.11
Simulation 19	200	10-3	0.33
Simulation 20	250	10 <sup>-3</sup>	0.43

458 Table 1 Combinations of parameters for coalescence time and mutation rate used in459 different simulations, and the index of homoplasy found for each.

460 <sup>*a*</sup> coalescence time in number of generations; <sup>*b*</sup> mean from 20 replicates









