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# The curious case of a hapless mathematical contribution to biology 

Chromosome inversions in Drosophila, 1937-1941

Eric Tannier


#### Abstract

This is the story, revisited by current eyes and means, of a mathematical biology problem explored in the 1930s in Thomas Morgan's laboratory, in California. It is one of the early developments of evolutionary genetics and quantitative phylogeny, and deals with the identification and counting of chromosomal rearrangements in Drosophila from comparisons of genetic maps. A re-analysis by present day mathematics and computational technologies of the data produced in the 1930s unveils how the solicitation of a mathematician led the team of biologists, against their first intuition, to an erroneous conclusion about the presence of phylogenetic signal in gene orders. This illustrates the role of errors in scientific activities, as well as some unexpected difficulties of multi-disciplinary collaborations. Also underlying is the possible influence of computational complexity in understanding the directions of research in biology.


Keywords history of biology • evolutionary genetics • chromosomal inversion . genetic maps • statistics • computational complexity • scientific errors • history of interdisciplinary studies • Drosophila

[^0]This is the first time in my life I believe in constructing phylogenies, and I have to eat some of my previous words in this connection. But the thing is so interesting that both Sttt [Sturtevant] and myself are in a state of continuous excitement equal to which we did not experience for a long time.
Theodosius Dobzhansky, letter to Milislav Demerec 1936
I am rather surprised to find myself figuring out hypothetical phylogenies for the Drosophila species, and taking them more or less seriously - after all the uncomplimentary remarks I've published about such procedures.

Alfred Sturtevant, letter to Otto Mohr 1939
These two epigraphs testify to a renewed excitement for phylogeny in the first half of the twentieth century. Such signs of enthusiasm linked to the revival of this old discipline were common. They are due, among other possible explanations, to the use of cytological and genetic comparisons, offering direct access to hereditary material, on the one hand, and the use of quantified methods, often associated with an approach of objectivity, on the other. On the one hand, cytology was like "looking at the cellar window" for Anderson (1937), and is "evidence as to the germplasm itself and is, therefore, of more fundamental importance than the mere architecture erected by the germplasm itself." Chromosomes provided "high-powered morphology" for Turrill (1938). "The chromosomes are the determinants of characters", and "one cell is sufficient for the identification of the species" for McClung (1908). "Were our knowledge of cell structure in the grasshopper complete enough we might erect a system of classification based upon cytological characters, just as reasonably as we have designated one using external anatomical structures" (McClung, 1908). On the other hand, the quantified comparisons allowed by precipitin reactions (Strasser, 2010b) made Boyden (1934) write that "The fact that naturalists of recent times have so often forsaken the study of phylogeny is due more to the feeling that such a study is likely to yield little certain progress than to the belief that the problems of phylogeny are unimportant or sufficiently well analyzed.".

Of course, the conjunction of the use of "semantic" ${ }^{1}$ characters and quantification, driven by the development of sequencing techniques and computers, has been fully realized only in the 1960s by the founders of Molecular Evolution (Suárez-Díaz, 2009; Dietrich, 2016). However the evolutionary genetics program in Thomas Morgan's laboratory beginning in 1914, and afterwards mainly led by the enemy brothers Alfred Sturtevant and Theodosius Dobzhansky, had similar epistemological characteristics ${ }^{2}$.

The objective of this article is to give an account of a particular moment of this research, focusing on Sturtevant's attempts, during several years and with several successive PhD students, to quantify the number of inversions between two Drosophila homologous genetic linkage groups. Some aspects of this research, in particular a collaboration with the mathematician Morgan Ward

[^1]from Caltech and the errors that have resulted from it, have been overlooked by historical accounts of chromosome evolution studies (Hagen, 1982, 1984; Kohler, 1994; Gannett and Greisemer, 2004; Smocovitis, 2006) or of quantification tendencies in biology (Hagen, 2003; Suárez-Díaz and Anaya-Muñoz, 2008; Suárez-Díaz, 2010; Hagen, 2010). The solicitation of mathematics and mathematicians in biology was common in the 1930s, particularly in evolution. It is even part of the construction of modern synthesis (Bowler, 2003). However this collaboration has unusual aspects, because of the type of mathematics involved, which was not the one available to evolutionists, developed for example by Fisher, Wright or Haldane in statistics and population genetics. Retrospectively computational aspects are visible, handled then by underlying systematically applied algorithms. Some of the questions addressed then were solved 50 years later, or remain unsolved today. The difficulties mathematicians still encounter today to cope with the same problems are visible in Sturtevant and Ward's attempts. In particular, trying to solve the same questions myself with today's mathematics and technologies, I point to three computational and numerical approximations first made consciously by biologists, which strangely turned into mistakes and a wrong biological interpretation following the collaboration with Ward. This curious case of a an unfortunate multi-disciplinary collaboration exemplifies the presence and the importance of errors in the practice of science. We could also see an example of the often overlooked influence of computational intractability (Papadimitriou, 1993) in a biological research program.

In a first part of this manuscript, I give contextual elements concerning the use of chromosomes for evolutionary studies, worldwide and in Thomas Morgan's lab, in order to account for both the continuity and the originality of Sturtevant's research. Then in a second part I relate how Sturtevant progressed from the first genetic map to the challenge of counting inversions. in the course of the narration I give a solution to the described problems according the current state of science. I then discuss in a third part what this exercise can teach to us on the presence of errors and complexity in computational biology, as well in this early attempt as today.

## 1 Chromosomes as documents of evolutionary history

In the first half of the twentieth century, the development of genetics and cytology has engaged several researchers and research teams in comparative studies of chromosomes or linkage groups in order to establish evolutionary relationships and evolutionary histories (Hagen, 1982). The activity of delimiting and classifying species or making phylogenies began to include as possible markers chromosome numbers, shapes, sizes, behavior during the cell cycle, centromere positions or gene arrangements. To cite only a few landmarks, at the International Zoological Congress of 1907, in Boston, cytologist Clarence Erwin McClung stated that a character measured within the cell, such as the number of chromosomes, could be considered as informative as any morpho-
logical character for phylogenetic classification (McClung, 1908). In Berkeley from 1915 onward, plant geneticist Ernest Brown Babcock gathered a team to work on the evolution of the Crepis flowering plant and participated in the foundation of the "Bay Area Biosystematists" (Hagen, 1984; Smocovitis, 2009), an influential multidisciplinary group working on plant systematics. In 1926, the International Congress of Plant Science held a joint session of taxonomists, cytologists and geneticists (Hagen, 1984). In 1937, the field was sufficiently established for Edgar Anderson, from the Missouri Botanical Garden, to write an extensive review on the contribution of cytology to taxonomy in botany (Anderson, 1937). In 1938, Babcock and his collaborator George Ledyard Stebbins Jr, who would subsequently follow this research line (Smocovitis, 2006), published the influential book The American Species of Crepis, in which all the genetics and cytological knowledge was harnessed to decipher the complex evolutionary relationships among the Crepis genus (Babcock and Stebbins, 1938; Smocovitis, 2009).

In the genetics laboratory of Thomas Hunt Morgan, at Columbia from 1914 to 1928 and at Caltech thereafter, a comparable research program was engaged on Drosophila, the traditional model organism on which genetics was first developed (Kohler, 1994). It has been initiated by Charles Metz, born in 1889, arrived in Thomas Morgan's laboratory at Columbia in 1912, where he became interested in cytology. Metz soon remarked that his observation of Drosophila chromosomes in anaphase possibly carried phylogenetic information because different species had different chromosomal conformations. Combining the presence or absence of microchromosomes and the fissioned or fused state of two autosomes from 12 Drosophila species, Metz managed to classify chromosome organizations into five types. The types were then organized into a tree, where the branches could be interpreted as evolutionary events (Figure 1).

In his 1914 article, from which Figure 1 is reproduced, Metz speculated that the differences in the chromosome types "may indicate an evolution of chromosomes in the genus" (Metz, 1914). However, in subsequent articles on the description of chromosome types, Metz became more and more cautious about the evolutionary interpretation (Kohler, 1994), mainly because of the difficulty in assessing the homology ${ }^{3}$ between chromosomes via this technique of independent observation in different species. This led his subsequent publications (Metz, 1916, 1918) to seem more like an organized catalog of chromosome types, with fewer evolutionary implications.

Then began the search for a technique to assess homology. One method was to produce hybrid species and observe coupled chromosomes during segregation, but had little success with Drosophila species (Kohler, 1994). Hybrids were common but almost always sterile. Two subsequent techniques would better allow for the possibility of assessing homology and were explored in

[^2]

Fig. 1 Reproduced from Figure 1 in Metz (1914). Five different karyotypes, found in 12 different Drosophila species, are organized into a tree with a wishful evolutionary interpretation. Nodes 9 and 11 represent the same type of chromosome organization, meaning that the two phylogenetic positions are equally possible. Reproduced with the kind permission of Wiley and the Journal of Experimental Zoology, Part A: Ecological Genetics and Physiology.

Thomas Morgan's laboratory: mapping genes on chromosomes (from 1917) and the hybridization of polytene chromosomes (from 1936).

Charles Metz himself left Columbia for Washington in 1914 and did not participate further in activities in Columbia, even though he became an eminent Drosophila geneticist. However, while he was at Columbia he did not work alone and his research program continued in the hands of others. As witnessed by an acknowledgment in his 1914 article (Metz, 1914) he benefited from the help of a young student from Columbia, Alfred Sturtevant.

## 2 Alfred Sturtevant and Comparative Genetic Mapping, 1921 to 1941

### 2.1 Genetic maps and the prediction of inversions

Sturtevant, born in 1891, completed his doctorate in 1914 with Thomas Morgan at Columbia University. One of his legendary achievements was to respond to Morgan's remark that the strength of the genetic linkage between genes was possibly related to the physical distance between the genes in a chromosome. From this idea, Sturtevant defined a genetic distance as the percentage of crossing-over between two genes observed from the frequency of associated phenotypes in Drosophila ampelophila ${ }^{4}$. As this distance was close to a linear function, it was possible to position genes on a line. This led to the first ge-

[^3]netic map, placing six genes on the "sex-linked" linkage group ${ }^{5}$ (Gannett and Greisemer, 2004).

Sturtevant's map was followed by several others issued from the same team. In particular, Morgan and Bridges' 36-marker map of the X-chromosome of Drosophila melanogaster (Morgan and Bridges, 1916) provoked a controversy with William Castle and, by implication, among several other researchers, about the relevance of the linear model in depicting chromosomes (Castle, 1918; Sturtevant et al., 1919; Castle, 1919; Morgan et al., 1920). Even though each protagonist gave the impression of standing firm on his respective position, the controversy clarified a great deal of the theory, as well as its underlying and ad hoc hypotheses.

The real starting point for evolutionary genetic studies was the discovery of a mutation of that linear structure. Inversions, which consist of replacing a chromosome segment by its reverse order, were hypothesized by Sturtevant (1921), based on the observation of differences in the arrangements of five "corresponding" ${ }^{6}$ markers of chromosome 3 of Drosophila simulans and Drosophila melanogaster. The inversion hypothesis was confirmed by adding markers, while the comparative mapping of Sturtevant and Plunkett (1926), as depicted in Figure 2, presents a striking visual argument for it ${ }^{7}$.


Fig. 2 Reproduced from Figure 1 of Sturtevant and Plunkett (1926): a visual argument for the existence of inversions and their utility for taxonomy. Linkage group 3 of Drosophila simulans (lower solid line) and Drosophila melanogaster (upper solid line) are compared They consist in placing genes (points) on the line (the chromosome, or linkage group). Homology of genes is represented by dashed lines. Reproduced with the kind permission of The Biological Bulletin.

[^4]Inversions themselves had the same status as linkage groups, that is, they were theoretical objects independent of any direct cytological observation. A cytological demonstration of their existence would be made later with the techniques of Painter (1933).

From this possibility of detecting a mutation by comparing genetic maps, Sturtevant developed a comprehensive research project in line with his collaboration with Metz. It consisted in mapping the genes of different Drosophila species, assessing the homologies between these genes and, from the chromosome structure, reconstructing the evolution of the associated organisms (Kohler, 1994). This research plan was not fully realized, although several publications and many unpublished results ${ }^{8}$ confirm decisive advances and reveal some challenges.

### 2.2 The statement of a mathematical problem

Among the challenges was the detection of several successive overlapping inversions. Comparing two arrangements differing by one inversion was easy. However if several overlapping inversions may have occurred, which is likely if more distant species are compared, an additional difficulty arose. In 1937, Sturtevant, published with C. C. Tan, a Ph.D. student of himself and Dobzhansky, a comparison of the arrangements of 38 genes along all chromosomes of Drosophila melanogaster and Drosophila pseudoobscura (Sturtevant and Tan, 1937). The comparative maps, inferred from the homologies of genes deduced from similar phenotypic effects, are reproduced in Figure 3. Inversions are not as visible as in Figure 2 because the species are more distant, thus the accumulation of inversions has blurred the signal.

It is useful to carefully examine in Figure 3 both the organized description of the data and the paragraphs from the 1937 article by Sturtevant and Tan. Two mathematical problems are stated. One concerns the calculation of the number of successive inversions that are necessary ${ }^{9}$ to transform a series of letters (the gene order in melanogaster) into alphabetical order (the gene order in pseudoobscura). The other asks if this number is likely to be obtained if the arrangement of letters is supposed random. For example, the sequence of chromosome IIL can be transformed into alphabetical order by two inversions as follows:

$$
D E F A C B \rightarrow A F E D C B \rightarrow A B C D E F .
$$

The first inversion concerns the segment $D E F A$, and the second the segment $F E D C B$. The problem of computation of this number becomes tricky when genes and inversions become numerous. Notice, in the paragraph reproduced

[^5]legitmate. If the pseudoobscura sequence in each arm is arbitrarily taken as an alphabetical one ( $\mathrm{A} B \mathrm{C} \ldots$ ), then the melanogaster sequences become:

| $X$ | L | H | F | E | B | A | D | C | K | I | J | G | M | $(7)$ |
| ---: | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| II $L$ | D | E | F | A | C | B | $(2)$ |  |  |  |  |  |  |  |
| II $R$ | A | C | E | B | F | D | $(4)$ |  |  |  |  |  |  |  |
| III $L$ | C | F | E | B | A | D | $(3)$ |  |  |  |  |  |  |  |
| III $R$ | A | E | B | C | F | D | G | $(3)$ |  |  |  |  |  |  |

The numbers in parentheses represent the numbers of successive inversions necessary to turn these sequences into alphabetical ones (in the case of $X$ we are not yet certain that six inversions may not be sufficient). The mathematical properties of series of letters subjected to the operation of successive inversions do not appear to have been worked out, so that we are so far unable to present a detailed analysis. It does appear, however, that the five arms (taken together) are definitely more alike in the two species than could result from chance alone.

Fig. 3 Extracted piece from Sturtevant and Tan (1937). Letters in the far left column are chromosome names. Other capital letters are gene names. number in parentheses are minimum number of inversions, necessary to transform the arrangement of letters in a line (melanogaster arrangement into the alphabetical order (pseudoobscura arrangement). In the paragraph following the array of letters, a working program for mathematicians and (not yet existing) computer scientists is proposed (see text for details). Reproduced with permission from Springer.
in Figure 3, that Sturtevant and Tan recognized that their best scenario had seven inversions, but they were uncertain whether six was impossible. No detail is given about their method to find the scenario with seven and the reason why they doubt it is the minimum number but it is not hard to imagine a solution of algorithmic nature, enumerating many scenarios, that faced a too high numer of possible scenarios. The modesty of their statement was retrospectively a good intuition, since

## LHFEBADCKIJGM

$\rightarrow$ ABEFHLDCKIJGM
$\rightarrow$ ABCDLHFEKIJGM
$\rightarrow A B C D E F H L K I J G M$
$\rightarrow A B C D E F H G J I K L M$
$\rightarrow$ ABCDEFGHJIKLM
$\rightarrow$ ABCDEFGHIJKLM
is one of the several possible bona fide sequences of six successive inversions ${ }^{10}$. The "detailed analysis" called for by Sturtevant and Tan (see Figure 3) would have to wait several decades before it became possible with the help of new mathematical and computational techniques (Fertin et al., 2009). Besides its anecdotal value however, this mention that the result was unsure is important, because later on it was turned into an error: meaning that the modest statement of ignorance was forgotten, while the number seven was taken for granted. Together with two other approximations concerning the statistical statement, this would lead to erroneously changing the biological conclusion.

This brings us to the second mathematical problem, the statistical one. Indeed, the last reproduced sentence in Figure 3 states that the permutations of genes, as observed in the comparative arrangement in pseudoobscura and melanogaster, "are definitely more alike in the two species than could result from chance alone." The term "definitely" is interesting for our purpose, because it illustrates the progressive extent of the quantification. It is a strongly asserted although intuitive statement that became a statistical hypothesis in a follow-up paper of 1941 by Sturtevant and another student, Edward Novitski (Sturtevant and Novitski, 1941). Novitski, like Tan before him, was first a student of Dobzhansky and continued with Sturtevant after their dispute (Novitski, 2005). He then worked on the same subjects, chromosomes and evolution, using a different approach. Together with Sturtevant, he provided a large catalog of homologies, some from the literature and some newly obtained via classical genetic techniques, along with a deeper mathematical analysis of the 1937 data. Again, a close look at the mathematical technique helps to understand the progressive introduction of quantification, and how, if it gives the impression of objectivity and fights a "methodological anxiety" (Suárez-Díaz and Anaya-Muñoz, 2008), it is not necessarily a guarantee of greater veracity or precision.

### 2.3 The call for a professional mathematician

Going back over the statements of Sturtevant and Tan (those reproduced in Figure 3), Sturtevant and Novitski announced that they had solicited the help of Morgan Ward, a renowned mathematician from Caltech. Sturtevant himself

[^6]was understanding reasonably well mathematics, and Novitski (2005) retrospectively praised his "mathematical mind" compared with Dobzhansky, but he probably felt that no easy technique could solve this question and logically solicited an expert. In order to state whether the difference in arrangements was indeed "more alike [...] than could result from chance alone", calculations of means and standard deviations of inversion distances of random permutations were performed by the complete enumeration of permutations up to size six, by random sampling of 60 and 40 permutations for sizes eight and nine, and by a linear interpolation for higher numbers. Indeed, as they admitted, "For numbers of loci above nine the determination of this minimum number proved too laborious, and too uncertain, to be carried out" (Sturtevant and Novitski, 1941).

They obtained a mean of 7.6 inversions for 13 genes (see Figure 4), and concluded that, in contrast to their first intuition, "Evidently the two species are not more alike than could easily result from chance alone". The comparison of the term "definitely" in the previously quoted sentence, and the term "evidently" used here, calls for several remarks. Firstly, the second states that the first was evidently a wrong intuition, which tells us something about the scientific personality of Sturtevant: he does not hesitate to admit a supposed error from himself in strong terms. Then, if the second corrects the first by a quantitative assessment of the intuition behind the first, we can note that it largely retains an intuitive part. The authors, after having considered that the differences were "definitely" significant without having calculated them, regard it as "evidence" that seven is not significantly different from 7.6 , but the argument for it depends on a standard deviation upper bound estimation (less than 1, according to the authors). A final remark is that, if we carefully check the computations, it is unfortunately noticed that the first intuitive argument, stated using this word "definitely", was correct, and that the correction, stated using the word "evidently", was not. It is sad to note that the elegance of Sturtevant, contradicting his own result, was itself a scientific error, because the first result was in fact better reflecting the data, according to their own criteria.

It is striking that, even today, no better technique is known for calculating these numbers. Only the improved performance of computers allows the modern researcher to enumerate all permutations and their inversion distance up to 13 genes in 1995 (Galvão and Dias, 2015) ${ }^{11}$ instead of six in 1941, and an asymptotic bound for the mean has been calculated (Bafna and Pevzner, 1996) with no applicability to such small values. Hence, I have used the enumeration to compute, according to modern techniques and knowledge, the values for the numbers considered by Novitski, Sturtevant and Ward. I consider these values more precise than theirs, because I use a complete enumeration of the space instead of an extrapolation. Of course the values are the result of my

[^7]
# Evidently the two species are not more alike than could easily result from chance alone. 

Table 4
Comparison of the required and calculated numbers of inversions to change the melanogaster into the pseudoobscura sequences.

| ELEMENT | A | B | C | D | E | TOTAL |
| :--- | :---: | :--- | :--- | :--- | :--- | :--- |
| Loci | 13 | 6 | 6 | 6 | 7 |  |
| Inversions required | 7 | 2 | 4 | 3 | 3 | 19 |
| Inversions calculated | 7.6 | 3.0 | 3.0 | 3.0 | 3.7 | 20.3 |

Fig. 4 Extracted piece from Sturtevant and Novitski (1941). The numerical errors (or imprecisions) in column A (the two computed values of 7 and 7.6 are incorrect, and should be 6 and 7.9), partially originating from the one depicted in Figure 3 led to the wrong conclusion concerning the homology between gene orders, as shown just above the table on this figure. Reproduced with the kind permission of the Genetics Society of America and the journal Genetics.
own understanding of the problem and I cannot discard the hypothesis that a future work will refute them, but I think this is the best which can be achieved with today's knowledge and technology. This modern analysis shows, for 13 genes, a mean of 7.9 instead of the interpolated value of 7.6 from 1941 (see Figure 4) and a standard deviation of 0.85 instead of the "less than one" of the 1941 estimation.

### 2.4 The addition of errors

The 1937 and 1941 estimations were close to the corrected values ${ }^{12}$. However, the small differences add up to three small errors or approximations: one in the minimum number (seven instead of the six inversions necessary in reality), one in the average number ( 7.6 instead of 7.9 in reality) and one in the standard deviation (less than 1 instead of 0.85 ). All in all these change the conclusion. After a corrected calculations, six inversions can be considered different from 7.9 , with a standard deviation of $0.85{ }^{13}$.

[^8]It is retrospectively vertiginous that Sturtevant and Novitski (1941), assisted by a mathematician, claimed in 1941 to correct the intuitive statement of Sturtevant and Tan (1937) in $1937^{14}$, but did not correct the real error that was present in the 1937 paper (the number of inversions necessary to sort the letters in alphabetical order). Instead they corrected, in the wrong direction, the statement that the permutations were different from random ones, which introduced two errors while failing to correct the only real one. The help of a mathematician, which ordinarily would have been considered a good idea for such a problem, was disastrous in this case, as it undermined, for the wrong reasons, the sound intuitions that the biologists first had.

Detecting these errors goes beyond the mathematical exercise and an exaggerated attention to the details. And it is not only the story of a an unusual and unfortunate early collaboration of biologists with a mathematician. Success stories are more often related than errors, but it could be that the fate of scientific research is sometimes influenced by mistakes of diverse types (Firestein, 2015; Livio, 2014). Here, the fact that very closely related species, such as melanogaster and simulans, had apparently not conserved any detectable similarity in gene orders might have participated to orient genetic research in other directions. Indeed, a Drosophila phylogeny based on chromosomes was hardly conceivable according to this conclusion.

Little changed in that direction after 1941. In a 50-page landmark article about a Drosophila genus phylogeny, Sturtevant (1942) included only two pages on chromosomes, from which he derived no decisive phylogenetic relationship. The document is mainly based on morphological characters. This can be contrasted with the book of Babcock and Stebbins (1938), which acknowledged the possible use of chromosomes for the phylogeny and evolutionary history of Crepis, even though it was biologically more complex because of hybridization and the diversity in the modes of reproduction of plants. Babcock started his research on Crepis with a wish to find an equivalent of Drosophila in plants, to explore to what extent the results of Morgan's fly laboratory were generalizable (Smocovitis, 2009). He did not fully succeed in this precise goal but in some aspects went beyond the Drosophila research in evolutionary genetics and cytology.

### 2.5 Epilogue: Theodosius Dobzhansky and Polytene Chromosomes

Of course the evolutionary genetics project Metz and Sturtevant had in 1914 has not stopped because of a few mathematical mistakes made in the 1930s. One important reason is that it necessitated a prohibitive amount of work to assess the homology between genes and between chromosome segments.

[^9]In the studies reported here, from 1937 and 1941, a catalog of homologous genes was gathered according to the similarities in phenotype variations. This tedious method, difficult to automate, could not be envisaged beyond a certain evolutionary depth. A new hope in that direction was introduced with the discovery of a technique for comparing polytene chromosomes.

In 1933, Theophilus Painter invented an alternative technique (Painter, 1933, 1934) to detect similarities and differences between chromosome organizations. It consisted in hybridizing polytene chromosomes from different strains or species of insects and visualizing chromosome inversions (Figure 5). Immediately, geneticists and cytologists exploited the potential of this technique from a comparative and evolutionary perspective (Gannett and Greisemer, 2004). It has remained a widely used technique for studying rearrangements until today.


Fig. 5 Concatenated polytene X-chromosomes of Drosophila melanogaster, from Figure 1 in Painter (1934). An inversion on the "delta 49 " variant strain is made visible by a loop on the concatenated giant chromosome. Reproduced with the kind permission of the American Genetics Association and the Journal of Heredity.

In particular, it was used by Theodosius Dobzhansky, first in association with Sturtevant and then independently after their partnership ended. Dobzhansky was born in 1901 and arrived at Morgan's laboratory at Columbia in 1927. He then moved to Caltech with the group in 1928. At first, he and Sturtevant had a very close relationship as collaborators and friends. Dobzhansky used to say that he owed his life to Sturtevant, who had strongly supported him in securing a position in the United States.

Dobzhansky and Sturtevant differed in terms of practice and vision. While their differences initially complemented each other, they soon caused a problem in their relationship. Dobzhansky saw himself as a field naturalist interested in natural populations, while Sturtevant worked with species grown in the laboratory (Kohler, 1994). Dobzhansky was interested in the theoretical processes of evolution, while Sturtevant was more of a geneticist and systematicist.

Dobzhansky published copiously and was expansive, extravagant, irreverent, religious and sensitive to celebrity: in short, the opposite of Sturtevant's personality (Novitski, 2005).

Initially their differences yielded very productive and innovative scientific research. Dobzhansky collected many pseudoobscura strains from all around California and the United States ${ }^{15}$ and promoted the cytological studies, while Sturtevant took what was interesting for genetics and, in particular, his now old project of comparing chromosomes from an evolutionary perspective. The field strains collected by Dobzhansky and the Painter technique seemed ideal for studying the evolutionary history from chromosome inversions. Indeed, the two identified races of Drosophila pseudoobscura (see Figure 6) showed some intraracial variability. It was possible to classify all the strains according to the structure of their chromosomes, such that a hypothetical evolutionary history could be deduced from this classification. In 1936, the first phylogenetic tree whose branches are chromosome inversions was published (Sturtevant and Dobzhansky, 1936) (see Figure 6).


Fig. 6 A phylogeny of seven Drosophila pseudoobscura strains, from Sturtevant and Dobzhansky (1936). Reproduced with the tacit permission of the National Academy of Science of the United States of America.

An augmented phylogeny was published in 1938 by Dobzhansky and Sturtevant, including 17 pseudoobscura strains (Dobzhansky and Sturtevant, 1938), although the context was already different. The complementarity of the two

[^10]authors had turned into opposition. The retirement of Morgan, aged 70 in 1936, and the inevitable succession, revealed ambitions, frustrations and fears (Kohler, 1994). It prompted the beginning of the rift. The 1938 paper, the last of their fruitful collaboration, was mainly Dobzhansky's work according to himself (in his oral history interviews of 1962, cited by Kohler (1994)), a situation which continued in the series "Genetics of Natural Populations" (Dobzhansky and Queal, 1938). In 1940, Dobzhansky left Caltech for Columbia ${ }^{16}$.

Compared to genetic maps, assessing homology using the cytology of polytene chromosomes was fast and much less costly, which partly explains its immediate and long-lasting success. Regarding longer-term evolution, however, it was somewhat also limited. While it was extremely efficient at comparing different natural strains of a single species, it could not be used to compare two distant species in which chromosomes are separated by several inversions. If there were more than three overlapping inversions on the same chromosome, the technique yielded almost no interpretable observations. Intermediary steps were required.

However Dobzhansky and Powell (1975) followed by others (Carson and Kaneshiro, 1976) finally established the phylogeny of Drosophila clades with more than a hundred arrangements and several hundred inversions. Polytene chromosomes are still used in insect chromosome comparisons, and cytology has turned into cytogenetics, with extremely productive follow-ups (Carson and Kaneshiro, 1976; Brehm, 1990; Dutrillaux and Dutrillaux, 2012).

It is noticeable that, when the comparison of protein sequences was made possible by new molecular techniques (Zuckerkandl and Pauling, 1965), Dobzhansky did not engage in this field. Instead, he attacked this new trend in molecular studies by taking a "naturalist's" point of view (Dobzhansky, 1963, 1966; Dietrich, 1998). This is symptomatic of how genetics in the first half of the twentieth century on one side, and molecular evolution in the second half on the other, have negotiated their place in evolutionary biology (Hagen, 1999; Dietrich, 1998; Sommer, 2008). Dobzhansky, who could accommodate genetics as a component of the study of evolution and participate in the unification of genetics and evolution, could not accept the imperialistic statements of Zuckerkandl on protein comparisons, claiming that proteins were possibly the only reliable materials with which to study evolution.

## 3 Discussion

3.1 Counting mutations as a computational biology problem

The introduction of measures, statistics and mathematics into evolutionary studies and phylogeny has traversed all the twentieth century (Hagen, 2003; Sommer, 2008; Suárez-Díaz and Anaya-Muñoz, 2008; Suárez-Díaz, 2010). This

[^11]tendency is visible in biology, science and society in general (Kay, 1993; de Chadarevian and Kamminga, 1998; Porter, 1996). While it was not systematically the case, several researchers valued this use as a possibility to turn phylogeny into a bona fide science.

Computing evolutionary distances has been an important activity for establishing phylogenetic relationships. In the first half of the twentieth century it was done for example with serological and immunological reactions (de Chadarevian, 1996; Strasser, 2010b; Hagen, 2010), DNA hybridization (Suárez-Díaz, 2014), which results hopefully would reflect the amount of divergence between proteins or chromosomes.

It has been observed that the kind of quantification involved has become a direct quantifying of DNA mutations only with the birth of molecular biology in the 1960s (Hagen, 1999, 2003, 2010; Strasser, 2010b; Suárez-Díaz, 2014; Dietrich, 1994, 1998; Morgan, 1998; Sommer, 2008), involving a particular type of mathematics, often aided by the use of computers (Hagen, 2000, 2001; Strasser, 2010a).

The kind of mathematics used by Sturtevant and Ward for counting inversions has a very special status to this respect. On the one hand, it consists in counting successive mutations in semantic characters, just like counting substitutions in protein or gene sequences. In that sense, it is more related to the mathematics developed in the 1960s than the quantification from the 1930s developed as a proxy, "waiting for sequences" (Hagen, 2010). On the other hand, counting inversions has a decisive difference with counting point mutations: as an approximation, point mutations can be considered independent from each other, while overlapping inversions are inaccessible to this kind of simplifying hypothesis. That can explain why, even if introduced 30 years before, counting inversions is until today much less developed than counting point mutations.

The technique for counting inversion involves algorithms. In the absence of a trivial mathematical formula for estimating a number of inversions, Sturtevant, his students and Ward must have applied some method. They have counted inversions between several hundreds of pairs of permutations: not only those coming from their biological data, but also the whole set of permutations up to 6 elements, plus samples of permutations of size seven to nine. They do not detail how they achieved this but admit "For numbers of loci above nine the determination of this minimum number proved too laborious, and too uncertain, to be carried out". This means that they were certain for numbers of loci up to nine, which is already a difficult exercise on some permutations. We do not know how they arrived to this confidence but we can only imagine an automatic method, that is, an algorithm.

Algorithms were not at all common to solve biological problems. They were known to mathematicians but their usage was not formalized. The famous Turing articles are contemporaneous from Sturtevant's researches (Turing, 1936). It is by the way singular that this mention of what we can call today a computational biology problem originates from the laboratory of Thomas Morgan, to whom legend attributes an aversion to computers. It is said that he banned

Friden calculators from the biology department at Caltech, because he mistrusted all quantitative and automatic results ${ }^{17}$.

Even if the possibility of analysing DNA sequences at the whole chromosome level has brought more data, more precision and more evolutionary depth, the principle of chromosome comparison, oppositely to the detection of point mutations in genes, has not changed with the availability of sequences and still consists in counting inversions (Pevzner and Tesler, 2003; Murphy et al., 2005). The semantic stage had been reached in the 1930s for this kind of mutation.

### 3.2 Interdisciplinary studies

Interdisciplinarity is also an element of this history, with ambiguous outcomes. It was already not rare that mathematicians got involved in biological problems, or that biologists use statistics, or that biologists and mathematicians would collaborate (Hagen, 2003). Sturtevant was able to use basic mathematics, had a "mathematical mind" according to his student Novitski (Novitski, 2005), and began as an autonomous and modest mathematician the comparison of chromosomes (Sturtevant and Tan, 1937). Along the lines of this article, a mathematical and a computational problem are modeled, and some solutions arise. It is acknowledged that some results are "not yet certain". This might have decided Sturtevant to contact Morgan Ward, from the mathematics department of his university. Sturtevant was able to model and solve to a certain extent the mathematical problem, but was not "yet" certain of the result. He already had in mind to check it and may be he had in mind to have it checked by a professional. This interdisciplinary practice is not the kind practiced by Dobzhansky and Wright at the same time, where both equally involved, complementary. Ward is not involved in the general project, as witnessed by an acknowledgement but no co-authorship. From this collaboration with a mathematician, Sturtevant has made some advances on his problem, and also adopts a less modest style concerning the results. He trusts in Ward more than in himself concerning mathematical results. Part of this rigorous and modest mind has led him to engage in an erroneous direction.

### 3.3 The importance computational complexity

The errors I have reported were obviously not the result of incompetency or poor intuition on the part of researchers. They could be due insufficient interest in the problem from the practitioners. Indeed, assessing the homologies between genes by genetic techniques was time-consuming, costly, not susceptible to automation nor generalization to more distant species, which led little chances of success to a wide research program based on this technique. This might explain that the results of the comparison between melanogaster and

[^12]pseudo-obscura have not been reproduced for other species, nor the mathematical techniques have been refined, and the errors corrected by further work.

However the facts that Sturtevant requested the help of a professional mathematician despite being himself a decent amateur, that two publications, with two different Ph-D students, with four years distance, mention the mathematical problem, that between the two, intuitive statements are abandoned for quantified statements, that a supposed error in the first publication is corrected in the second, these facts witness a reasonable interest by Sturtevant for obtaining a right answer to the problems he raised.

Thus one of the reasons why he did not achieve it at that time might be because the mathematics raised by successive overlapping inversions is intractable ${ }^{18}$. Not only are these problems hard ${ }^{19}$, but the possibility of their resolution required the development of theoretical computer science and algorithmics, whose starting point can be seen as concomitant with Sturtevant's research. Although little known and often despised by most biologists, computational complexity is a constraint that can have an influence on the directions taken by biological researches, and the history narrated here could be an example of the influence of such a constraint. Computational complexity might also explain why until today some biological processes are intensively studied (point mutations in DNA) while others are much less quantified (repetitions, inversions).

### 3.4 The importance of errors

Good histories of scientific errors are scarce (Firestein, 2015; Livio, 2014). Their importance, their influence is often hidden by practitioners who like to put forward successes, or use errors as pedagogical scarecrows (Bosch, 2018) while historians are wary of their anachronistic character: pointing at an error is a way to include the future refutation as an element of understanding the past.

Errors are nonetheless a good way to approach the ambiguous relationship that scientists have to the truth, and can be characteristic of a knowledge state, of a sociological or psychological context. Here, the errors point at some challenges that mathematical and computational biology have to face regarding computational complexity, interdisciplinary studies, and how a number, associated with a caution note, can be taken four years later for a trustworthy value, the authors themselves forgetting the note.

[^13]
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[^1]:    1 That is, the ultimate hereditary material, directly transmitted, and not one of its products, according to the vocabulary of Zuckerkandl and Pauling (1965), see also Dietrich (1998)
    ${ }^{2}$ Despite crucial differences in the biological objects have been also described (Darden, 2005)

[^2]:    ${ }^{3}$ Homology in the sense of "common evolutionary origin" was not so common in the beginning of the XXth century. The terminology was discussed and ranged from "allelomorph" to "corresponding". I most often use the current terminology for unification purposes.

[^3]:    ${ }^{4}$ Renamed melanogaster a short time after.

[^4]:    ${ }^{5}$ Later named the X-chromosome in order to emphasize its oddity. The links between chromosomes and linkage groups were already well established, as witnessed by the natural use of "chromosome" in genetic studies from the 1910s.
    ${ }^{6}$ I.e homologous, see the previous footnote. Homology was deduced from similarity of phenotype variations during crossing experiments.
    7 Several types of translocations, i.e. other mutations of the linear organization of genes along chromosomes, were predicted at the same time (Bridges, 1917; Mohr, 1919; Morgan et al., 1925) and later cytologically demonstrated (Muller, 1929; Dobzhansky, 1930). They were seen more as "deficiencies", or abnormalities of karyotypes, possibly obtained under mutagenic conditions. Inversions were oppositely immediately seen as evolutionary patterns susceptible to being used in differentiating species, thus as a character for taxonomy. Translocations were later used in plant taxonomy by Babcock and Stebbins (1938).

[^5]:    8 Examined by Kohler (1994), who writes that the unpublished part is of wider significance.
    9 That is, a number as small as possible, which does not invoke unnecessary inversions, i.e. a parsimony argument, of the same kind as the one on sequences later proposed by Camin and Sokal (1965). This number has been subsequently named the inversion distance of a permutation (Fertin et al., 2009).

[^6]:    ${ }^{10}$ It is also possible to prove that six is necessary, that is, five is not possible. Here is the simplest proof I found (unfortunately involving a little bit of theory of breakpoint graphs for which one can refer to Fertin et al. (2009)): there are nine "breakpoints" in this permutation, that is, nine positions which have to be used as inversion extremities (positions between two non consecutive letters and at the extremities when the first or last letter is not properly placed according to the alphabetical order). As one inversion touches at most two breakpoints, it is necessary to have at least five distinct inversions to access nine breakpoints. If there is a scenario with five inversions, at least three of them have to be the only ones touching their breakpoints because only one re-use is allowed. This involves the existence of at least three disjoint small alternating cycles (size 4) in the breakpoint graph. The breakpoint graph of this permutation has 3 small cycles EBDC, LHKI and LHGM (found by manual enumeration of all possible small paths), which can make only two disjoint ones.

[^7]:    11 It is a coincidence that the maximum number published in 1995 is precisely the one with which struggled the biologists in 1937. The similarity of the orders of magnitudes of our ability to handle these data over time is indicative of the inherent computational complexity of the problem.

[^8]:    12 Note that the corrected values I give use nothing other than the published data and the statistical test proposed by the authors. Nevertheless this analysis requires computational tools that were not available at the time. There would probably be a lot more to discover if we were to redo such analysis with modern-day data.
    13 A bona fide statistical test here would require a p-value rather than a comparison of standard deviations. It was not imagined in the 1937 and 1941 articles but it is possible to compute empirical p-values from samples from 1,000 random uniform permutations. This gives an approximate probability of 0.06 of achieving six inversions or fewer for 13 genes, a probability 0.2 of achieving two inversions or less for six genes and a probability 0.35 of achieving three inversions or less for seven genes. Each chromosome taken independently is hardly conclusive. Together, they can be considered significantly far from random according to this measure and the usual significance thresholds.

[^9]:    14 They insisted and elaborated on the "incorrect conclusion of Sturtevant and Tan", which was actually reasonable from what I can judge today given the data. They also insisted that, in hindsight, the only retrospectively wrong statement in the 1937 article was in fact correct:
    "it may be noted that this revision does not change the number of inversions required to in hindsight, the only retrospectively wrong statement in the 1937 article was in fact correct:
    "it may be noted that this revision does not change the number of inversions required to transform one sequence into the other", thereby transforming the modest imprecision into an error.

[^10]:    15 When they both discovered a new species Drosophila miranda, Dobzhansky first named it sturtevantiana.

[^11]:    16 The story of the rift between Dobzhansky and Sturtevant is extensively related in several places, for example, Kohler (1994); Novitski (2005).

[^12]:    17 This story is attributed to Charlie Munger in Belevin (2007).

[^13]:    18 Note that this contrasts with the later history of protein sequence alignment, where a comparison between two related sequences was possible without excessive mathematical involvement. I do not mean that there is no interesting mathematical problem associated with sequence alignment but that it was easier to solve with the intuitive ideas of biologists than to compute an inversion distance. (see, for example, Margoliash (1963)).
    19 Finding the minimum number of inversions to transform a sequence of letters into alphabetical order is provably intractable (Caprara and Lancia, 2000).

