A COMBINED MOLECULAR PHYLOGENY OF *ENCYCLIA* (ORCHIDACEAE) AND RELATIONSHIPS WITHIN LAELIINAE

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ABSTRACT. Nuclear (nrITS) and plastid (matK and trnL-F) DNA sequence data were used to estimate the phylogeny of Laeliinae and Encyclia sensu lato. The combined molecular plus indel matrix was analyzed with a successively weighted parsimony analysis. Bootstrap percentages were used to estimate support in the tree topology. The following relationships have strong bootstrap support: Meiracylliinae is shown to be embedded in Laeliinae; Ponerinae is supported as monophyletic; Neocogniauxia is sister to the Ponerinae plus Laeliinae clade; and Encyclia sensu stricto, Euchile, and Dinema are supported as monophyletic clades. The Prosthechea clade has strong bootstrap support. Encyclia sensu lato is not monophyletic. The taxonomic histories of Anacheilium, Dinema, Encyclia, Epithecia, Euchile, Hormidium, Oestlundia, Osmophytum, Artorima, Hagsatera, Psychilis, and Prosthechea are elucidated.

Key words: Systematics, taxonomy, nomenclature, classification, molecular, genomes

Introduction

Encyclia is a neotropical genus of mostly epiphytic species. The genus has at least 421 published species names (The Plant Names Project 1999). Encyclia is included in the subtribe Laeliinae Bentham, which consists of ca. 43 genera (Dressler 1993), although generic concepts are still in flux (van den Berg et al. 2000). Laeliinae are among the most commonly cultivated and frequently hybridized orchids (Withner 1988). The objectives of this research were to determine the position of Encyclia within the subtribe Laeliinae and to resolve the phylogeny of Encyclia sensu Dressler (1961) at the sectional level. The differences in floral morphology between the sections of Encyclia sensu Dressler exceed the differences between many genera in Laeliinae.

TAXONOMIC HISTORY

Encyclia was described by Hooker (1828) based on a plant (*E. viridiflora* Hook.) collected by William Harrison near Rio de Janeiro, Brazil.

Taxonomic treatments of *Encyclia* represent a complex succession of invalid and misapplied nomenclature, involving the following ten generic names: *Epidendrum* L. (1763), *Encyclia* Hook. (1828), *Dichaea* Lindl. (1833), *Prosthechea* Knowles & Westc. (1838), *Psychilis* Raf. (1838), *Epithecia* Knowles & Westc. (1839), *Hormidium* Lindl. ex Heynh. (1841), *Anacheilium* Hoffmanns. (1842), *Artorima* Dressler & G.E. Pollard (1971), and *Hagsatera* R. González (1974). The result has been a problematic taxonomic classification of the genus *Encyclia* (TARIE I)

Encyclia. When Hooker (1828) described Encyclia viridiflora, he based the generic name on the circumstance of the column being enclosed by the lip (circumvolvo). He also stated that it would be unnatural to include this species in any of the existing genera of Epidendreae. Subsequently, Lindley sunk the genus into Epidendrum subgenus Encyclium in 1853. Encyclia was unused until Schlechter (1914b) revived it. Other taxonomists then started placing various taxa in the genus. Lemée (1955) inexplicably transferred five taxa from Epidendrum subgenus Aulizeum Lindl. to Encyclia, thereby enlarging

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TABLE 1. Comparison of recent Encyclia classifications.

| Dressler 1961, 1971 | Brieger 1977 | Pabst 1981 | Higgins 1997 | Withner 1996, 1998 |
|---|----------------------------|---------------------------|--------------|-----------------------|
| Encyclia subg. Dinema | Dinema | Dinema | Dinema | |
| Encyclia subg. Encyclia Encyclia sect. Encyclia Encyclia sect. Leptophyllum | Encyclia | Encyclia | Encylia | Encyclia |
| Encyclia subg. Osmophytum | | | Prosthechea | |
| Encyclia sect. Osmophytum | Hormidium | Anacheilium | | |
| Encyclia sect. Hormidium | Hormidium | Hormidium | | |
| Encyclia sect. Euchile | Hormidium sect. Euchile | Anacheilium sect. Euchile | | Euchile |

the circumscription of *Encyclia*. Dressler (1961) circumscribed *Encyclia* describing two sections, *Encyclia* section *Encyclia* (capsule cylindrical in cross section) and *Encyclia* section *Osmophytum* (capsule 3-angled in cross section). Subsequently, Dressler (Dressler & Pollard 1971) revised the genus to include six sections and three subgenera. Pabst, Moutinho, and Pinto (1981) transferred the taxa in *Encyclia* section *Hormidium* Dressler to *Hormidium*, raising that group to generic level. Pabst, Moutinho, and Pinto (1981) also transferred some of the taxa in *Encyclia* section *Osmophytum* to *Anacheilium*.

Prosthechea. Knowles and Westcott (1838) first published *Prosthechea* to describe the species P. glauca. In the following year, however, they changed the generic name to Epithecia, because they felt that Prosthechea was too similar to another unspecified generic name (Knowles & Westcott 1839). Examination of the generic names published in Index Kewensis revealed the very similar generic name Prosthesia (Violaceae) that Blume previously had published (Blume 1826, Royal Botanic Gardens Kew 1993). This may be the unspecified name that induced Knowles and Westcott to change the generic name from Prosthechea to Epithecia. Because Prosthechea is not a homonym of Prosthesia. the original publication remains valid according to the International Code of Botanical Nomenclature (Greuter et al. 2000). Epithecia was superfluous since Prosthechea had been validly published and should have been accepted by the authors. The derivation of the name Prosthechea is from the Greek word prostheke (an appendage), in reference to the appendage of tissue on the back of the column of P. glauca. Prosthechea has been resurrected by the author (Higgins 1997, 1999), and species in *Encyclia* subgenus Osmophytum have been renamed Prosthechea.

Euchile. Taxa in this group have been assigned to Sobralia, Cattleya, Epidendrum, Encyclia, Hormidium, or Prosthechea at various

times. *Encyclia* section *Euchile* was described by Dressler and Pollard (1971) for the taxa with anomalous lip morphology in *Encyclia* subgenus *Osmophytum*. Withner (1998) raised the sectional name to generic status because of the atypical pattern of leaf epidermal cells. Higgins (1997) considered the two species in this group as members of *Prosthechea*.

Oestlundia. The genus Oestlundia W.E. Higgins (2001) was established for four members of Encyclia subgenus Encyclia section Leptophyllum Dressler & G.E. Pollard. The combination of narrow grass-like leaves, four pollinia, a horizontal rostellum, and wing-like lateral teeth on the column, along with an unlobed lip markedly adnate to the column bearing fleshy ridges/papillae, is unique in the subtribe Laeliinae. Dressler included Encyclia subulatifolia (A. Rich. & Gal.) Dressler in this section, but Microepidendrum subulatifolium (A. Rich. & Gal.) W.E. Higgins is not a member of this genus.

Microepidendrum. Higgins (2002) validated this Brieger genus for a diminutive species that appears to be a small reed-stem Epidendrum with terete leaves but with a flower unlike Epidendrum or Encyclia. This species, which is found growing in the dry oak forests of Mexico, has no close allies in subtribe Laeliinae; and the other species placed in Microepidendrum by Brieger are not closely related to M. subulatifolium.

Psychilis. The genus Psychilis was described by Rafinesque (1838) based on P. amena, but the generic name was ignored; and most members of Psychilis have been considered Encyclia. Britton and Wilson (1930) transferred Epidendrum krugii Bello to Encyclia; Schrenk (1977) transferred Epidendrum bifidum Aubl. to Encyclia; Beckner (1970) transferred Epidendrum olivaceum Cogn. and Epidendrum truncatum Cogn. to Encyclia; Dod (1983) described Encyclia vernicosa and transferred Epi-

dendrum cogniauxii L.O. Williams, Epidendrum buchii Cogn., and Epidendrum domingense Cogn. to Encyclia; and Ackerman (1987) transferred Epidendrum kraenzlinii Bello to Encyclia. Sauleda (1988), however, reestablished the genus and transferred all the above to Psychilis.

Dichaea. When Swartz (1788) described the taxon Epidendrum glaucum, he placed it in Epidendrum sensu Linnaeus. Lindley (1831) transferred the taxon to Dichaea glauca (Sw.) Lindl., thus establishing the genus Dichaea. Inexplicably, Schlechter (1914a, 1915) attempted to revive Epithecia by transferring 20 Dichaea taxa to the genus Epithecia, which is a synonym of Prosthechea Knowles & Westc. Schlechter (1915) listed Dichaea glauca (Sw.) Lindl. as a synonym for Epithecia glauca of Knowles and Westcott. This was incorrect because Dichaea was based on Epidendrum glaucum Sw. and not on Epidendrum glaucum (Knowles & Westc.) Lindl. Schlechter probably was confused by Lindley's treatment of Epidendrum glaucum (Knowles & Westc.) Lindl. rather than by Epidendrum glaucum Sw. All of the species placed in Epithecia by Schlechter are placed correctly in the genus Dichaea (Zygopetalinae, Maxillarieae), which belongs to a completely different tribe. In any case, Schlechter's revision must be rejected because Epithecia is a superfluous name (Greuter et al. 2000).

Artorima. This genus was described by Dressler and Pollard (1971) for Encyclia erubescens (Lindl.) Schltr. (Schlechter 1914c), because the retrorse, hook-like callus is unlike that of any known genus. Brieger (1977b) invalidly transferred Epidendrum kermesinum Lindl. to Artorima. Pedro Ortiz (1995) then inexplicably transferred that species to Encyclia kermesina (Lindl.) Ortiz.

Hagsatera. Roberto González (1974) described this monotypic genus for *Epidendrum brachycolumna* L.O. Williams, which had been placed into *Encyclia* by Dressler (1961). Hagsatera has a short column and eight pollinia, atypical of either *Encyclia* or *Epidendrum*.

Dinema. The genus *Dinema* was established when Lindley (1831) made the combination *D. polybulbon* (Sw.) Lindl. The taxon had been described originally as *Epidendrum polybulbon* by Swartz (1788). Dressler (1961) transferred the taxon to *Encyclia*; and the *Encyclia* subgenus *Dinema* (Lindley) Dressler & Pollard was established because the taxon did not fit into the other subgenera (Dressler & Pollard 1974).

Anacheilium. Following the publication of A. cochleatum (L.) Hoffmanns. in 1842, the ge-

neric name had only been used for one other taxon, A. fragrans (Sw) Acuña (Acuña Galé 1938), until it was applied to the species of Encyclia section Osmophytum by Pabst, Moutinho, and Pinto (1981). Anacheilium, however, does not have priority for this group of taxa, because it includes Prosthechea glauca Knowles & Westc. Acuña Galé accepted the genus Anacheilium Rchb. ex Hoffmanns. placing Epidendrum fragrans Sw. in the genus along with A. cochleatum (L.) Hoffmanns. (Hoffmannsegg 1842).

Hormidium. After the description of H. uniflorum (Lindl.) Heynh. in 1841, the generic name was unused until revived by Cogniaux (1898). Schlechter (1914a, 1915), Brieger, and Hunt (Brieger & Hunt 1969, Brieger 1977a) already had begun transferring plants into the genus, when Pabst, Moutinho, and Pinto (1981) presented their revision of Hormidium. Although the genus Hormidium Lindl. ex Heynh. is validly published (Dressler 1970), this group of more than 100 species, treated as Hormidium by Brieger (Brieger & Hunt 1969), includes Prosthechea glauca; and therefore the generic name Prosthechea has priority over Hormidium. Additionally, Hormidium has been used as an algal name.

Osmophytum. Epidendrum section Osmophytum was established by Lindley (1839) for plants with usually scented flowers. Subsequently, Lindley (1840) transferred Prosthechea glauca to Epidendrum, making the combination E. glaucum (Knowles & Westc.) Lindl. Thus recognizing Epithecia glauca Knowles & Westc. as a synonym, he placed it in Epidendrum section Osmophytum (Lindley 1840). This combination is illegitimate, based on its being a later homonym of E. glaucum Sw., which was transferred to Dichaea by Lindley himself. Prosthechea glauca subsequently was transferred to Encyclia as E. glauca (Knowles & Westc.) Dressler & G.E. Pollard and assigned to Encyclia subgenus Osmophytum (Lindl.) Dressler (Dressler & Pollard 1971).

APPROACH

The use of DNA sequencing for phylogenetic studies has become a mainstream tool for Orchidaceae. Current techniques with appropriate selection of DNA for the taxonomic level being studied have proven successful (Chase & Palmer 1989). For example, ITS sequences have been extremely valuable in evaluating monophyly at generic level and below in Cypripedioideae (Cox et al. 1997), Disinae (Douzery et al. 1999), and Pogoniinae (Cameron & Chase 1999). The

matK gene has been used to determine relationships in Gastrodieae and Neottieae (Kores et al. 2000). Phylogenetic relationships in Disa have been studied using trnL-F sequences (Bellstedt et al. 2001). Analyses that combine DNA sequences from different regions and genomes are giving better resolution than are single gene sets. Phylogenetic examples in Orchidaceae at the subtribal level and below include Oncidinae (Williams et al. 2001). Stanhopeinae (Whitten et al. 2000), Catasetinae (Pridgeon & Chase 1998), Pleurothallidinae (Pridgeon et al. 2001), Diurideae (Kores et al. 2001), Arethuseae (Goldman et al. 2001), Coelogyne (Gravendeel et al. 2001), and Bifrenaria (Koehler et al. 2002). This study uses DNA sequences from both the nuclear and plastid genomes in a combined analysis.

Nuclear Genome

Sequencing ITS regions has provided a good source of nuclear DNA characters for inferring intrageneric and intergeneric evolutionary relationships in many plant groups (Baldwin et al. 1995), and previous studies suggest it also will be useful in *Encyclia*. The study of intrageneric relationships requires DNA sequences of adequate size and fast evolutionary rate (nucleotide variation) (Nickrent et al. 1994). The ITS regions of rDNA have been shown to evolve at rates appropriate for examining diverging lineages (Baldwin 1992). The ubiquity of rDNA and available techniques for rapid determination of the nucleotide sequence make rDNA a good tool for inferring evolutionary relationships, except in cases of hybridization (Hamby & Zimmer 1992). In hybrids, the nuclear genome is a recombination of DNA from both parents. Thus hybrid ITS sequences can be polymorphic. The nuclear genes that code for ribosomal DNA are arranged in a tandemly repeated unit found in high and variable copy number (Rogers & Bendich 1987). The functioning regions are highly conserved because of selective pressures, while the spacer regions that fail to code for a functional RNA are not subject to the same selective pressures. The spacer regions are not highly conserved and contain species-specific variation (Hamby & Zimmer 1992). In these internal transcribed spacer (ITS 1 & 2) regions, the number of substitutions is typically twice as large between genera as within genera (Savard et al. 1993). Thus ITS regions are valuable for taxonomic studies at subgeneric levels in some taxa.

Plastid Genome

Plastid DNA is a relatively abundant component of total plant DNA with a conservative rate

of nucleotide substitution (Palmer et al. 1988). The chloroplast genomes of photosynthetic land plants are circular DNA molecules ranging from 120 to 217 kilobase pairs. The genome contains two large inverted repeats that separate the large and small copy regions (Palmer 1986). Expansions or contractions of the inverted repeat regions are largely responsible for variations in the molecular size of the genome. Both strands of the chloroplast genome are actively expressed. Recombination does not play a major role in cpDNA evolution, where biparental transmission is rare, and intraspecific diversity is low. Chloroplast DNA provides uniparental (usually maternal) phylogenetic markers (Soltis et al. 1992). The types of mutations found in DNA include: nucleotide rearrangements, point mutation substitutions, insertions, and deletions. Studies of combined plastid DNA have been useful in cladistic analyses of other petaloid monocotyledons (Meerow et al. 1999). The trnL-F region and matK gene were chosen for this study because they have appropriate levels of variation (mutation).

The *trnL-F* Region

The DNA that encodes for the transfer RNA for leucine is designated as trnL. The region of the chloroplast genome spanning the area from the trnL 5' exon to the trnF 5' exon is defined as the trnL-F (UAA) intron sequence (Taberlet et al. 1991). This non-coding region displays one of the highest frequencies of mutation in the chloroplast genome (Palmer et al. 1988). Additionally, length-mutation indels (insertions/deletions) provide parsimony-informative characters (McDade & Moody 1999). The trnL-F sequences have proven useful in the phylogenetic analysis at the generic level (Gielly et al. 1996). Researchers at the Jodrell Laboratory, Royal Botanic Gardens Kew, have found the trnL-F region to be useful in the resolution of intrageneric relationships (Molvray et al. 1999). This region provided an intermediate level of resolution within Laeliinae.

The matK Gene

The *matK* gene encodes an RNA maturase involved in splicing introns from transcripts. This region is located between the 5' and 3' exons of the transfer RNA gene for lysine. The *matK* gene has proven useful in resolving relationships in Saxifragaceae (Johnson & Soltis 1995) and Ericaceae (Kron & Judd 1997, Kron et al. 1999). Indels in *matK* sequence data provide additional support for clades in Saxifraga (Soltis et al. 1996). This region provided limited deeper resolution within the Laeliinae phylogeny.

MATERIALS AND METHODS

The selection of materials is as important as the methods used for the study. Taxa selection and gene selection can greatly affect resolution of the analysis. DNA and sequence processing describes the techniques used to obtain the phylogenetic tree.

Taxa Selection

The ingroup taxa (35 specimens) were selected to represent all sections of Encyclia sensu Dressler (Dressler 1961, Dressler & Pollard 1971, see TABLE 1). The type species for each section was sequenced when possible; however, the type for the genus (Encyclia section Encyclia), E. viridiflora, has never been recollected and may be extinct. Specimens have been chosen to include as much geographic variation as possible from Florida, Mexico, Brazil, and the Caribbean. To account for variation in floral morphology and biology, we included species with resupinate and non-resupinate flowers, as well as wasp and bee pollinated species. Four species were sampled from two separate individuals to confirm their position in the topology: Dinema polybulbon (Sw.) Lindl., Microepidendrum subulatifolium (A.Rich & Gal.) W.E. Higgins, Euchile mariae (Ames) Withner, and Oestlundia luteorosea (A.Rich. & Gal.) W.E. Higgins.

A large outgroup was required because Encyclia sensu lato (s.l.) may not be monophyletic (van den Berg et al. 2000). The outgroup taxa (42 specimens) were selected from the subtribe Laeliinae and sister subtribes within Epidendreae based on the affinities proposed by Dressler (1993) and a plastid analysis of Orchidaceae (Cameron et al. 1999). Three taxa not in Laeliinae were used as an outgroup for the subtribe. Meiracyllium trinasutum Rchb.f. (subtribe Meiracylliinae) was chosen as an outgroup because of a velamen type that suggests a close alliance to the Laeliinae (Dressler 1993). Pleurothallis racemiflora Lindl. ex Lodd. and Restrepiella ophiocephala (Lindl.) Garay & Dunsterv. (subtribe Pleurothallidinae) were selected because the Pleurothallis seed type was present in Ponera, a member of Laeliinae (Dressler 1993). Outgroups (TABLE 2) were chosen to include species from several different clades of Laeliinae (van den Berg et al. 2000) to account for the variation within the subtribe.

Gene Selection

We attempted to clarify these generic and subtribal relationships by performing parsimony

analyses of sequence data from three regions: matK (plastid); trnL intron and trnL-F spacer hereafter treated as a single matrix designated trnL-F (plastid); and nuclear ribosomal DNA (nrDNA) ITS 1, 5.8S, and ITS 2-hereafter referred to as ITS. The matK gene codes for a maturase ~1550 bp in length and several times more variable than rbcL in most angiosperms (Soltis & Soltis 1998). The trnL-F region (Taberlet et al. 1991) is largely noncoding and consists of an intron in the trnL (UAA) gene and the trnL-trnF (GAA) intergene spacer. The ITS region (Baldwin et al. 1995) consists of two noncoding spacer regions flanking the 5.8 S gene and is widely used for phylogenetic studies. Recent studies have indicated that combined molecular data sets using regions with different levels of variation provide resolution at different areas of the cladogram. They also indicate that phylogenetic resolution and levels of support are improved by directly combining independent molecular data sets (Chase & Cox 1998, Soltis et al. 1998). Additionally, length-mutation indels can provide parsimony-informative characters (McDade & Moody 1999). Indels in the plastid sequences were coded by hand and included in the combined matrix.

DNA Processing

Total DNA was extracted from fresh or silicadried leaves using a modification of the Doyle and Doyle (1987) protocol, and stored at -20° C. The DNA regions of interest were amplified using the polymerase chain reaction (PCR). The amplification annealing temperatures and primers for each region were: ITS 72°C, 17SE (Forward), and 26SE (Reverse) (Sun et al. 1994); trnL-F 58°C, C(F), and F(R) (Taberlet et al. 1991); and matK 51°C, 56(F) and 1520(R) (Whitten et al. 2000). Betaine (N,N,N-trimethylglycine) was added to the PCR reactions to relax DNA secondary structure and enhance amplification (Frackman et al. 1998). The Applied Biosystems, Inc. (ABI) Big Dye[®] Terminator Kit was used for cycle sequencing, and products were run on an ABI 377 Sequencer. Detailed protocols can be found in Higgins (2000).

Sequence Data Processing

The electropherograms were trimmed and edited using Sequence Navigator 1.01 (Applied Biosystems 1994a). Sequence fragments were then combined to produce a continuous sequence using AutoAssembler 1.30 (Applied Biosystems 1994b). The consensus sequence was exported as a text file and placed in a NEXUS matrix (Maddison et al. 1997). The sequences

TABLE 2. GenBank Accession Numbers.

| Taxon | ITS | matK | trnL-F |
|--|-----------|----------|----------|
| Acrorchis roseola Dressler | AY008521 | AY396086 | AY422389 |
| Alamania punicea La Llave & Lex. | AF260177 | AY425801 | AY422452 |
| Artorima erubescens (Lindl.) Dressler & G.E. Pollard | AF260178 | AY425798 | AY422449 |
| Brassavola cucullata (L.) R.Br. | AY008589 | AY396097 | AY422400 |
| Broughtonia negrilensis Fowlie | AY008569 | AY396093 | AY422396 |
| Cattleya dowiana Batem. | AF260210 | AY396100 | AY422403 |
| Cattleya forbesii Lindl. | AY429394 | AY396102 | AY422405 |
| Cattleyopsis lindenii Cogn. | AY008570 | AY396096 | AY422399 |
| Dimerandra emarginata (G. Mey.) Hoehne | AF260179 | AY425795 | AY422446 |
| Dinema polybulbon (Sw.) Dressler | AY429398 | AY396109 | AY422412 |
| Dinema polybulbon (Sw.) Dressler | AY429399 | AY396110 | AY422413 |
| Domingoa kienastii (Rchb.f.) Dressler | AY008564 | AY396095 | AY422398 |
| Domingoa nodosa (Cogn.) Schltr. | AY008565 | AY425794 | AY422445 |
| Encyclia adenocaula (Llav & Lex.) Schltr. | AY008526 | AY396111 | AY422414 |
| Encyclia asperula Dressler & G.E. Pollard | AY429403 | AY396119 | AY422422 |
| Encyclia bractescens (Lindl.) Hoehne | AY008527 | AY396112 | AY422415 |
| Encyclia candollei (Lindl.) Schltr. | AY429404 | AY396120 | AY422423 |
| Encyclia cordigera (Kunth) Dressler | AY008528 | AY396114 | AY422417 |
| Encyclia dichroma (Lindl.) Schltr. in Schlechter | AY008530 | AY396117 | AY422420 |
| Encyclia diurna Schltr. in Fedde | AY429402 | AY396118 | AY422421 |
| Encyclia incumbens (Lindl.) D.J. Mabberley | AY429400 | AY396113 | AY422416 |
| Encyclia kienastii (Rchb.f.) Dressler & G.E. Pollard | AY429406 | AY396122 | AY422425 |
| Encyclia aff. oncidioides (Lindl.) Schltr. | AY429386 | AY425802 | AY422453 |
| Encyclia randii (Barb. Rodr.) Pôrto & Brade | AY429405 | AY396121 | AY422424 |
| Encyclia tampensis (Lindl.) Small | AY429401 | AY396115 | AY422418 |
| Epidendrum ibaguense Pavon ex Lindl. | AY008505 | AY396079 | AY422382 |
| Epidendrum conopseum R. Br. in Ait. | AY008506 | AY396080 | AY422383 |
| Euchile citrina (La Llave & Lex.) Dressler | AY008501 | AY396106 | AY422409 |
| Euchile mariae (Ames) Withner | AY429396 | AY396107 | AY422410 |
| Euchile mariae (Ames) Withner | AY429397 | AY396108 | AY422411 |
| Hagsatera brachycolumna (L.O. Williams) R. González | AY008515 | AY396088 | AY422391 |
| Hexadesmia crurigera Lindl. | AF260180 | AY396085 | AY422388 |
| Hexisea imbricata (Lindl.) Rchb.f. | AY429388 | AY396083 | AY422386 |
| Homalopetalum pumilio (Rchb.f.) Schltr. | AY429389 | AY396089 | AY422392 |
| Isochilus major Cham. & Schltdl. | AY008481 | AY396078 | AY422381 |
| Jacquiniella teretifolia (Sw.) Britton & P. Wilson | AY008519 | AY396087 | AY422390 |
| Laelia rubescens Lindl. | AY429391 | AY396098 | AY422401 |
| Laeliopsis domingensis (Lindl.) Lindl. & Paxton | AF260187 | AY425797 | AY422448 |
| Meiracyllium trinasutum Rchb.f. | AY429390 | AY396090 | AY422393 |
| Microepidendrum subulatifolium (A. Rich & Gal.) | | | |
| W.E. Higgins | AY429416 | AY396137 | AY422440 |
| Microepidendrum subulatifolium (A. Rich & Gal.) | | | |
| W.E. Higgins | AY429417 | AY396138 | AY422441 |
| Myrmecophila tibicinis (Batem.) Rolfe | AY429392 | AY396099 | AY422402 |
| Neocogniauxia hexaptera (Cogn.) Schltr. | AY429385 | AY425793 | AY422444 |
| Nidema boothii (Lindl.) Schltr. | AY008522 | AY396081 | AY422384 |
| Oestlundia cyanoclumna (Ames, F.T. Hubb. & | 177100110 | | |
| C. Schweinf.) W.E. Higgins | AY429418 | AY396139 | AY422442 |
| Oestlundia distantiflora (Rich. & Gal.) W.E. Higgins | AY429387 | AY425803 | AY422454 |
| Oestlundia luteorosea (Rich. & Gal.) W.E. Higgins | AY429414 | AY396135 | AY422438 |
| Oestlundia luteorosea (Rich. & Gal.) W.E. Higgins | AY429415 | AY396136 | AY422439 |
| Oestlundia tenuissima (Ames, Hubb. & Schweinf.) | 177100110 | | |
| W.E. Higgins | AY429419 | AY396140 | AY422443 |
| Orleanesia amazonica Barb. Rodr. | AF260176 | AY425799 | AY422450 |
| Orleanesia pleurostachys (Linden & Rchb.f.) Garay & | 137000555 | | |
| Dunst. | AY008525 | AY425800 | AY422451 |
| Pleurothallis racemiflora Lindl. ex Lodd. | AY008477 | AY396076 | AY422379 |
| Prosthechea abbreviata (Schltr.) W.E. Higgins | AF260181 | AY425804 | AY422455 |
| Prosthechea aemula (Lindl.) W.E. Higgins | AY008544 | AY396125 | AY422428 |
| Prosthechea chimborazoenisis (Schltr.) W.E. Higgins | AY429407 | AY396123 | AY422426 |
| Prosthechea cochleata (L.) W.E. Higgins | AY008545 | AY396126 | AY422429 |

Table 2. Continued.

| Taxon | ITS | matK | trnL-F |
|--|----------|----------|----------|
| Prosthechea cretacea (Dressler & G.E. Pollard) W.E | | | |
| Higgins | AY429413 | AY396134 | AY422437 |
| Prosthechea fragrans (Sw.) W.E. Higgins | AY429408 | AY396124 | AY422427 |
| Prosthechea glauca Knowles & Westc. | AY429410 | AY396130 | AY422433 |
| Prosthechea ionocentra (Dressler) W.E. Higgins | AY429411 | AY396131 | AY422434 |
| Prosthechea ochracea (Lindl.) W.E. Higgins | AY429412 | AY396133 | AY422436 |
| Prosthechea prismatocarpa (Rchb. f) W.E. Higgins | AY008548 | AY396132 | AY422435 |
| Prosthechea pseudopygmaea (Finet) W.E. Higgins | AY429409 | AY396128 | AY422431 |
| Prosthechea pygmaea (Hook.) W.E. Higgins | AY008546 | AY396127 | AY422430 |
| Prosthechea vitellina (Lindl.) W.E. Higgins | AY008547 | AY396129 | AY422432 |
| Ponera striata Lindl. | AY008484 | AY396077 | AY422380 |
| Psychilis mcconnelliae Sauleda | AY008568 | AY396091 | AY422394 |
| Psychilis krugii (Bello) Sauleda | AF260157 | AY396092 | AY422395 |
| Quisqueya ekmanii Dod | AY008567 | AY425796 | AY422447 |
| Reichenbachanthus cuniculatus (Schltr.) Pabst. | AY008551 | AY396084 | AY422387 |
| Restrepiella ophiocephala (Lindl.) Garay & Dunsterv. | AF262909 | AY396075 | AY422378 |
| Rhyncholaelia glauca (Lindl.) Schltr. | AY429393 | AY396101 | AY422404 |
| Scaphyglottis pulchella (Schltr.) L.O. Williams | AY008559 | AY396082 | AY422385 |
| Schomburgkia splendida Schltr. | AY008573 | AY396105 | AY422408 |
| Sophronitis cernua Lindl. | AY429395 | AY396103 | AY422406 |
| Sophronitis purpurata (Lindl. & Paxton) van den Berg & | | | |
| M.W. Chase | AY008641 | AY396104 | AY422407 |
| Tetramicra elegans (Hamilt.) Cogn. | AY008566 | AY396094 | AY422397 |

were manually aligned in the matrix, and 16 indels in the trnL-F and matK regions were coded as present or absent. The matrix was analyzed using Fitch (1971) parsimony and ACCTRAN character optimization with the PAUP* 4.0b3a software (Swofford 1998). An initial heuristic search of 1000 random addition replicates was used to identify islands of shortest trees. This search used equal-weighted, unordered characters, and the subtree pruning-regrafting (SPR) branching swapping algorithm, saving 10 trees per replicate. These trees were then used as initial trees and swapped to completion using the tree bisection-reconnection (TBR) algorithm to locate all possible phylogenetic trees, saving only the shortest length trees.

In the combined matrix only, the resulting set of trees was used to reweight the characters based on the Retention Index (RI) values for each character (Farris 1969) using a base weight of 1. The 1000 replicate heuristic search (SPR, 10 trees) was repeated, and the characters reweighted until the tree length stabilized. The trees identified in the reweighting procedure were swapped to completion using TBR. The support for the tree topology was evaluated with the full heuristic bootstrap algorithm of 1000 replicates using the equally weighted character values, 100 sub-replicates saving 10 trees per replicate, and nearest neighbor interchange (NNI) branch swapping (Felsenstein 1985). The bootstrap analysis was accomplished using equally weighted characters, because the use of fixed

weights derived by successive weighting leads to inflated bootstrap values (Thollesson 2000).

RESULTS

The results of the individual gene region analyses provided limited resolution and thus are discussed but not presented. The combined analysis produced a well-supported topology.

Individual Genomes

The statistics for the individual analyses are presented in TABLE 3. The bootstrap consensus trees for the ITS, trnL-F, and matK regions do not conflict, i.e., the supported clades do not have topologies that disagree between consensus trees. The three gene regions proved useful at different levels in the phylogeny: ITS being most variable was informative at the species level; trnL-F provided an intermediate level of resolution; and the matK region provided limited deeper resolution within the Laeliinae phylogeny. Several differences occur between the supported phylogenies of the nuclear and plastid genomes. Encyclia s.s. is supported by the ITS and trnL-F regions, Prosthechea is supported by the trnL-F region, Dinema is supported by the trnL-F region and matK gene, and Euchile is supported by the ITS and matK gene.

Table 3. Statistics from PAUP* analyses of separate and combined data matrices for the combined data set of 77 taxa in the Laeliinae multi-sequence analysis. SW = successively weighted statistics.

| | ITS | trnL-F | matK | Combined + indels | Combined SW |
|---|-------|--------|-------|-------------------|----------------------|
| No. included positions in matrix | 732 | 1284 | 1367 | 3741 | 3741 |
| No. variable sites | 352 | 369 | 364 | 1201 | 1201 |
| No. phylogenetically informative sites | 223 | 163 | 175 | 593 | 593 |
| Sites weighted <1 | 0 | 0 | 0 | 0 | 404 |
| No. of trees (Fitch)** | 10000 | 10000 | 10000 | 3780 | 9 |
| No. of steps | 1175 | 601 | 647 | 2625 | 1581 (Fitch 2625) |
| CI | 0.45 | 0.71 | 0.66 | 0.58 | 0.72 |
| CI excluding non-informative sites | 0.37 | 0.53 | 0.48 | 0.43 | 0.50 |
| RI | 0.55 | 0.68 | 0.66 | 0.59 | 0.71 |
| RC | 0.25 | 0.48 | 0.43 | 0.34 | 0.51 |
| Ave. no. changes per variable site*** (no. steps/no. var. sites) | 4.7 | 2.3 | 2.6 | 3.3 | 2.7 |

^{*} PAUP and Other Methods.

Combined Analysis

The aligned DNA regions plus indel matrix had 3741 total characters of which 68% (2540) characters were constant, 16% (608) variable characters were parsimony-uninformative, and 16% (593) were parsimony-informative characters. The following synapomorphic indels were found in the Laeliinae matrix: in the trnL-F region, there is a 324-base deletion in subtribe Laeliinae; a 17-base deletion in Encyclia s.s.; a 10-base insertion, and an 11-base deletion in Encyclia s.s., with the exception of E. cordigera (Kunth) Dressler; a 7-base insertion in Hormidium; a 7-base and a 10-base insertion in Orleanesia, and a 4-base insertion and 8-base deletion in Psychilis. In the matK gene, there is a 6base insertion in Caribbean clade of Psychilis, Tetramicra, Quisqueya, Broughtonia, Laeliopsis, and Cattleyopsis. The initial heuristic search identified 1354 shortest trees with a length of 2625 steps. These trees were swapped to completion, and 3780 equally parsimonious trees were retained. The parsimony tree scores are presented in Table 3. Bootstrap percentages shown in FIGURES 1 and 2 were determined using an equally weighted analysis.

After three rounds of successive reweighting, nine trees with a weighted length of 1581 steps were identified and swapped to completion, in contrast to Fitch's 2625 steps. The parsimony tree scores are presented in Table 3. One of the nine trees was randomly selected as an example. The selected tree (Figures 1 & 2) has Fitch branch lengths in character steps above the line and bootstrap values below, and the nodes that collapse in the strict consensus are indicated

with an arrow (◄). Bootstrap indexes were limited to values greater than 50%.

The placement of several clades in the combined analysis is informative regarding the phylogeny of Laeliinae. Rooting the tree with Pleurothallidinae shows Ponera and Isochilus to be sister to Laeliinae and Meiracyllium embedded within Laelliinae. Microepidendrum subulatifolium (A. Rich. & Gal.) W.E. Higgins is then sister to the remainder of the subtribe. A three-branch polytomy occurs in the outgroup taxa (Figure 1) and in *Encyclia* s.s (FIGURE 2). *Cattleya* appears to be paraphyletic, since the two taxa sampled do not form a clade. The Encyclia s.s. clade is sister to the Homalopetalum-Domingoa-Meiracyllium clade. Euchile is sister to Prosthechea, and Oestlundia is sister to the Alamania-Encyclia keinastii (Rchb.f.) Dressler & G.E. Pollard clade. The clade of Prosthechea pygmaea (Hook.) W.E. Higgins and P. pseudopygmaea (Finet) W.E. Higgins (Encyclia sect. Hormidium) is embedded in Prosthechea.

DISCUSSION

Four species appear twice in the topology; Dinema polybulbon (Sw.) Lindl., Microepidendrum subulatifolium (A.Rich & Gal.) W.E. Higgins, Euchile mariae (Ames) Withner, and Oestlundia luteorosea (Rich. & Gal.) W.E. Higgins. These species were sampled twice for the following reasons: Dinema because it is a monotypic genus; Microepidendrum subulatifolium because of its unexpected position in the topology, Euchile mariae because sampling occurred before its sister taxon was obtained, and Oest-

^{**} Search limited to 10,000 trees.

^{***} Calculated with one of the SW trees from the combined analysis.

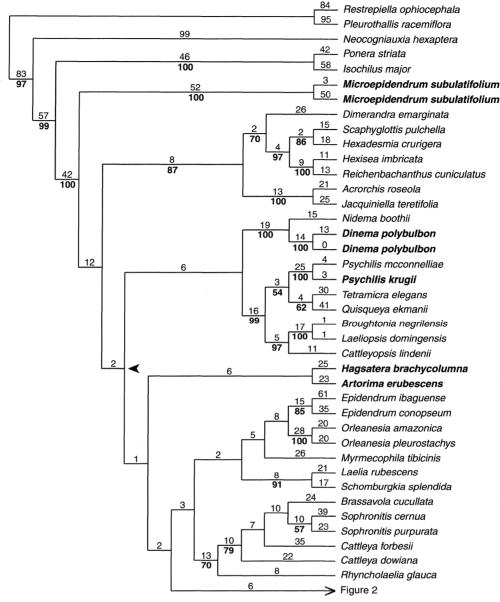


FIGURE 1. Selected tree (1 of 9) of Laeliinae topology based on the combined successively reweighted matrix (ITS, *trnL-F*, *matK*, and plastid indels). Taxa in bold are former members of *Encyclia* s.l. Fitch branch lengths (ACCTRAN) are above the branches, with equally weighted bootstrap indices below. The node that collapses in the strict consensus tree forming a trichotomy is marked with an arrow. This phylogeny continues in FIGURE 2.

lundia luteorosea because its specimens were unvouchered.

The topology of the strict consensus tree is in general agreement with a previously published ITS phylogeny of Laeliinae (van den Berg et al. 2000) using 295 taxa. *Neocogniauxia* is sister to Laeliinae plus Ponerinae sensu van den Berg and his coauthors (2000), and Meiracylliinae is

embedded within Laeliinae. Thus a monophyletic Laeliinae will include *Meiracyllium* but may exclude *Neocogniauxia*, *Ponera*, and *Isochilus*. The notable differences between the two studies are in the *Encyclia* alliance clade (FIGURE 2). In the three-gene study, *Nidema*, *Dinema*, *Dimerandra*, *Hagsatera*, and *Artorima* do not appear in the *Encyclia* alliance clade. Additionally,

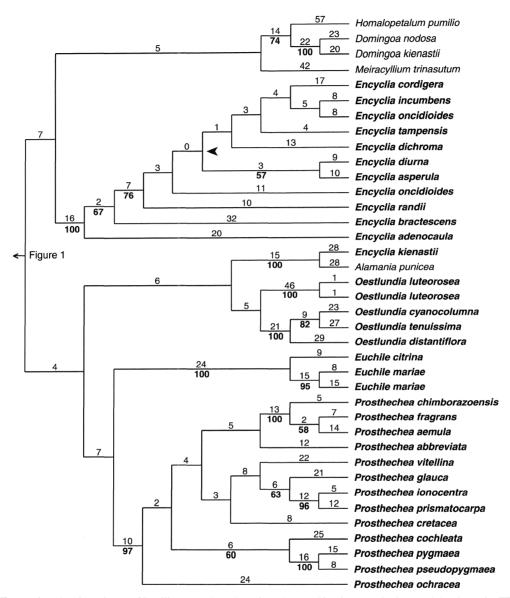


FIGURE 2. A selected tree of Laeliinae topology based on the combined successively reweighted matrix (ITS, *trnL-F, matK*, and plastid indels) highlights the *Encyclia* Alliance. Fitch branch lengths (ACCTRAN) are above the branches, with equally weighted bootstrap indices below. The node that collapses in the strict consensus tree forming a trichotomy is marked with an arrow. This tree connects to Laeliinae (FIGURE 1) at the base. Taxa in bold are former members of *Encyclia* s.l.

Dimerandra, Hagsatera, and Artorima do not appear in the Encyclia alliance clade. Additionally, Hagsatera is sister to Artorima in the strict consensus topology, although this position is not supported by bootstrap values. Psychilis is sister to Tetramicra and Quisqueya. These genera are included with Broughtonia, Laeliopsis, and Cattleyopsis in a Caribbean clade that has 99% bootstrap support.

The subtribal relationships and most terminal clades are supported by bootstrap values; however, the topology at midlevels in Laeliinae does not have bootstrap support. Within Laeliinae, the following clades of interest have strong bootstrap support: *Encyclia* s.s., *Prosthechea, Euchile*, and *Dinema*. The *Oestlundia* clade does not have bootstrap support. Although *Homalopetalum*, *Domingoa*, *Meiracyllium*, *Encyclia*, *Ala-*

| Characteristic | Encyclia sensu stricto | Prosthechea | Euchile | Oestlundia |
|--------------------------|--------------------------------|---|--|--|
| Pseudobulbs | Usually ovoid or conic-ovoid | Fusiform, usually flat- tened | Conic-ovoid or fu- siform-ovoid | Ovoid to conic- ovoid |
| Leaves | Thick | Usually thin | Thin | Thin |
| Glycoside crystals | Absent | Usually present | Absent | Absent |
| Inflorescence | Scape without spathe | Scape or sessile with prominent spathe | Scape without spathe | Scape without spathe |
| Flower | Resupinate | Usually non-resupinate | Resupinate | Resupinate |
| Labellum callus | 2 fleshy ridges | Usually a thick pad | Laminar ridges | Papillae |
| Labellum adnate | Usually at base | Half of column | At base | At base |
| Column | Often winged | Never winged | Not winged | Not winged |
| Column mid-tooth | Short, usually broadly deltoid | Large, narrowly del- toid, ligulate, or su- bflabellate | Large, truncate, subequal to later- al teeth | Short, rounded, shorter than lateral teeth |
| Mid-tooth ap- pendage | Absent | Fleshy, knob-like, ob- tuse, or truncate | Absent | Absent |
| Mid-tooth to an- ther | Appressed | Not appressed | Not appressed | Appressed |
| Column sinuses | Broad shallow | Deep usually acute | Deep | Shallow |
| Lateral teeth | Short | Stout | Stout | Wing-like |
| Rostellum | Vertical | Vertical | Vertical | Horizontal |
| Seed capsule | fusiform | 3-winged or sharply 3-angled | Weakly triangular | Fusiform |
| Capsule suture | Strap absent | Covered by strap of tissue | Strap absent | Strap absent |

TABLE 4. Morphological characteristics distinguishing genera segregated from Encyclia sensu lato.

mania, Oestlundia, Euchile, and Prosthechea form a clade (FIGURE 2) in the strict consensus, the relationships of the genera, and the adjacent outgroups in Laeliinae are not supported by bootstrap values. This Laeliinae phylogeny (FIGURE 1) also demonstrates that Rhyncholaelia Schltr. is not included in Laelia Lindl. and that Myrmecophila Rolfe is not included in Schomburgkia Lindl. In addition, the apparent paraphyly of Cattleya does not have bootstrap support and probably results from a low taxon number sampling error.

A different genus is required for Microepidendrum subulatifolium, since this species is clearly not an Epidendrum or Encyclia and does not form a clade with another genus. Microepidendrum subulatifolium is caespitose with very slender stems, new growth red; roots thick, verrucose, root tip red; leaves subcylindric, acute, strict; inflorescence racemose or paniculate, rachis flexuous, few-flowered; flower color sepals and petals yellow-brown, lip white, callus yellow, anther burgundy; sepals, elliptic-lanceolate, complicate-acute, recurved; petals oblanceolatelinear, acute or subacute; lip adnate to 3/5 of column, simple suborbicular, retuse, strongly plicate-undulate, margins erose, reflexed; callus ovate flattened disk, with 3 papillose keels; column small, clavate, three apical teeth subequal,

midtooth obtuse surpassed by anther; capsule ellipsoid. Transfer of *Encyclia kienastii* to *Alamania* remains questionable since we have not seen the voucher specimen, although the placement of *E. kienastii* does have bootstrap support.

Although the type species for *Encyclia* may be extinct and was not sequenced, the morphology of E. viridiflora clearly places it in the Encyclia s.s. group. Encyclia viridiflora has a separate 3-lobed lip that encircles the winged column, a lip callus of two parallel ridges, four pollinia, a rounded pseudobulb, and a branched inflorescence. Additional research is needed to examine the polyphyly of Cattleya and the placement of Encyclia kienastii. A larger threegene analysis of Laeliinae is in progress (C. van den Berg, W. Higgins, R. Dressler, W. Whitten, M. Arenas, A. Culham, & M. Chase unpubl. data) to examine differences between plastid and nuclear genomes. Additionally, relationships in Encyclia s.l. are being examined using the total evidence approach (holomorphology) of combining morphology and DNA (Higgins 2000).

A good classification should have maximum general utility, i.e., natural, easy to use, concise, predictive, aiding memory, and stable (Gilmour 1940, Backlund & Bremer 1998). Currently recognized genera in Laeliinae are built on the Linnaean principle of reproductive characters serv-

ing as the major source of generic-level characters (Judd et al. 1999), but convergence in pollination-related floral characters may result in polyphyletic genera. The previous classifications of Encyclia conflict with the molecular-based cladograms presented here. Encyclia in the broad sense includes many different taxa that are not closely related. For example, the taxa shown in bold face type in FIGURE 1 that have been included in the genus are spread across the subtribe. When FIGURE 2 is compared to former classifications of Encyclia, the relationships between the former sections are not supported: Encyclia section Hormidium (E. pygmaea & E. pseudopygmaea) is embedded in Encyclia section Osmophytum (Prosthechea); Encyclia section Leptophyllum (Oestlundia) is sister to Alamania and is not a member of Encyclia subgenus Encyclia; and Encyclia subgenus Dinema (Dinema) is not included in Encyclia s.l.

The recognition of Encyclia s.s., Euchile, Prosthechea, and Ostlundia at the generic level is more predictive, based on their morphological characteristics, than is Encyclia s.l. The following morphological characters distinguish the genera: Encyclia s.s. has a two fleshy-ridged callus on the lip; the column has a small mid-tooth appressing the anthercap and two short large deltoid lateral teeth; and the column is often winged. Euchile has glaucous leaves, a lip that encircles the column, a nectary at the base of the column, and three large truncate teeth on the column. Higgins (1997) placed Euchile mariae and E. citrina in Prosthechea; however, since this clade is sister to the remainder of Prosthechea, Withner's Euchile could be recognized as a distinct genus. The column structure of Eu*chile* differs in that the midtooth is not ligulate. Prosthechea has fusiform pseudobulbs often flattened and a prominent spathe; the callus is a thick pad, lip adnate one-half of column, three large knob-like teeth on column, ligulate midtooth; and the seed capsule is 3-winged/angled with a strap covering the suture (Higgins 1999). Oestlundia has a small mid-tooth that appresses the anther and two large wing-like lateral teeth; the rostellum is in a horizontal position between the lateral teeth, and the small pseudobulbs have grass-like leaves. These morphological characters are summarized in TABLE 4. The diversity of morphological features among the major clades of Encyclia s.l. make this group cumbersome at the generic level. When Encyclia s.l. is divided in smaller segregate genera, these smaller genera form predictive groups that are easily defined using morphological as well as molecular characters. Thus, a narrow delimitation of Encyclia is preferred as a more user-friendly classification.

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FOLIAR ANATOMY OF FIVE VRIESEA SECT. XIPHION (BROMELIACEAE) SPECIES

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ABSTRACT. The present work aims to extend the knowledge of the genus *Vriesea* Lindley, contributing data on the foliar anatomy of five species: *Vriesea bituminosa* Wawra, *V. longiscapa* Ule, *V. triligulata* Mez, *V. gigantea* Gaudich., and *V. fosteriana* L.B.Sm. Transverse and longitudinal cuts were made manually in fully expanded leaves. The usual histochemical tests were performed. Features typical to the Bromeliaceae were peltate trichomes, single layered epidermis, stomata located only on the abaxial surface of the leaves, a hypodermis with mechanical and water-storing functions, and collateral vascular bundles. Observed differences among the species were number of trichomes in both lamina and sheath, number of cells on the trichome shield, and number of layers of the aquiferous hypodermis. Many of the observed characteristics confirm the xerophytic nature of the leaves. The anatomical organization of the leaves in the studied Bromeliaceae could be related both to environmental pressures as well as to phylogenetic relationships.

RESUMO. O presente trabalho tem como objetivo ampliar o conhecimento acerca do gênero *Vriesea* Lindley fornecendo dados sobre a anatomia foliar de cinco espécies: *Vriesea bituminosa* Wawra, *V. longiscapa* Ule, *V. triligulata* Mez, *V. gigantea* Gaudich. e *V. fosteriana* L.B.Sm. O material botânico foi cortado a mão livre. Testes histoquímicos usuais foram realizados. Os resultados mostraram que as espécies exibem as características típicas da família: folhas hipoestomáticas, epiderme simples dotada de tricomas peltados multicelulares, hipoderme com funções mecânica e de reserva de água, tecido clorofiliano diferenciado em paliçádico e esponjoso do tipo braciforme e feixes vasculares colaterais. Foram notadas diferenças entre as espécies com relação à quantidade de tricomas ao longo da folha; número de células que compõem o escudo dos tricomas e número de camadas da hipoderme aquífera. As características observadas confirmam a natureza xerofítica das folhas. A organização anatômica das folhas das Bromeliaceae estudadas pode ser uma resposta a pressões ambientais assim como refletir relações filogenéticas.

Key words: Bromeliaceae, Vriesea, leaf anatomy, epiphytes

Introduction

Comprising nearly 2700 species (Benzing 2000) in 56 genera (Grant & Zijlstra 1998), the Bromeliaceae family presently represents an extremely diversified group of vascular plants, which has colonized a variety of neotropical habitats (Dahlgren et al. 1985). Specialization related to water-storage, represented by sheath development as well as xeromorphic leaf structure in many species, is a remarkable feature of this family, not yet sufficiently investigated. Family representatives are found both in xeric and mesic environments, from sea level to mountaintops, and account for a considerable portion of the epiphytic vegetation in neotropical forests (Benzing 1990).

Although some anatomic studies have been conducted (Tomlinson 1969, Benzing 1970, 1976, Braga 1977, Souza & Neves 1996, Sajo et al. 1998), the existing data on particular groups are fragmented and little explored, as for example the genus *Vriesea* Lindl. Considering the present infra-generic division of *Vriesea*, the Section *Xiphion* comprises ca. 130 species (Luther & Sieff 1994, 1997a, 1997b, Luther 2001). These species are characterized predominantly by an inflorescence with dull colors; corolla with cream, yellow, or reddish petals; androecium and gynoecium included within the corolla; and stigma with the convolute-blade type morphology (Grant 1993, 1995a, 1995b).

The present work provides data on the foliar anatomy of five species of the *Xiphion* section of *Vriesea*, which are discussed in the light of

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