Participation of Plant Hormones in Determination and Progression of Somatic Embryogenesis

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Abstract In vitro culture protocols have been developed for many species, mainly using empirical approaches, to induce somatic embryogenesis from various explant types. However, the underlying biochemical mechanisms governing induction, expression and maturation during somatic embryogenesis are still poorly understood. Among the signals that participate directly in the regulation of the different phases of this process, plant hormones emerged as candidates of choice. In this chapter, studies concerning the role of exogenously added plant growth regulators in somatic embryogenesis are reviewed. In addition, we discuss possible relationships between hormonal contents in starting explants and in cultures derived from them with their embryogenic competence. Moreover, information on evolution of endogenous plant hormone levels during induction and progression of somatic embryogenesis is presented. Finally, an overview of interactions between exogenous plant growth regulators and endogenous hormones in embryogenic systems is also included.

Abbreviations

- 2,4-D 2,4-Dichlorophenoxyacetic acid
- ABA Abscisic acid
- CK Cytokinin
- E Embryogenic
- GA Gibberellin
- GA3 Gibberellic acid
- IAA Indole-3-acetic acid
- IBA Indole-3-butyric acid
- NAA Naphthalene acetic acid
- NE Nonembryogenic
- PGR Plant growth regulator
- PAT Polar auxin transport
- SE Somatic embryogenesis
- TIBA 2,3,4-Triiodobenzoic acid

1 Introduction

Plant hormones play a determinant role in practically every developmental process studied to date in plants, somatic embryogenesis (SE) being no exception. Substances classified as plant hormones are of organic nature and act at very low concentrations. Whether these compounds should be named hormones or not, taking into consideration the properties of the corresponding compounds in animal physiology, has been a topic of some debate during the past few years. The term plant growth regulator (PGR) has been proposed as an alternative that matches more precisely the characteristics of these substances, but has the disadvantage that it has been used to name synthetic substances of this class (for details refer to Davis 1995). In this chapter, the term plant hormone will be used to define the endogenous and naturally occurring substances in the tissues, while the expression PGR will refer to those exogenously added compounds, usually of synthetic origin.

Most studies on regulation of SE have focused on one or another of the several stages in which this process has been divided. The first one involves the induction stage, in which somatic tissues acquire, directly (without a dedifferentiation step) or indirectly (by dedifferentiating tissues already differentiated, usually involving a callus phase), embryogenic (E) competence. This stage is followed by the expression of SE, in which the competent cells or proembryos start developing, after receiving the proper stimulus, passing through the phases characteristic of zygotic embryo development, i.e., globular, heart-shaped and torpedo-shaped stages in dicots, globular, scutellar (transition) and coleoptilar stages in monocots, and globular, early cotyledonary and late cotyledonary embryos in conifers (Jiménez 2001). Finally, during maturation, somatic embryos prepare themselves for germination, by desiccating and accumulating reserves.

SE is a very complex developmental process that shares similar characteristics, mainly in morphology and anatomy, within the same group of plants (monocots, dicots, gymnosperms), but which, at the same time, differs in the requirements needed to induce and govern its determination and progression. This complexity has impeded fully understanding the biochemistry and physiology of SE, the role of plant hormones and PGRs included. Therefore, in spite of the large amount of research conducted on the involvement of plant hormones, but especially of PGRs during SE, the way they interact with the cells and tissues to render an observed response is still not clear. Therefore, for specific genotypes, trial-and-error experiments to establish the proper culture conditions and media, especially the type and level of PGRs to be used, are nowadays still common practice (Huang et al. 2004; Zhang et al. 2005).

The aim of this review is to summarize relevant and recent findings related to the involvement of plant hormones and PGRs in the determination and progression of SE. Whenever possible, review works will be cited to avoid mentioning very large amounts of literature, although specific references, not always of recent publication, related to relevant findings will be also employed.

2 Effect of PGRs on SE

2.1 PGRs as Inducers of SE

The PGR composition of the culture medium is of prime importance to achieve the desired morphogenic reaction. In several culture systems, such as in *Arachis hypogaea* seedlings (Victor et al. 1999), *Juglans regia* embryonic axes (Fernández et al. 2000) and sunflower zygotic embryos (Thomas et al. 2004), the morphogenic pathway can be oriented through either shoot organogenesis or SE, only by modifying the PGR composition of the culture medium.

Among individual groups of PGRs, auxins are the most routinely used agents to mediate the transition from somatic to E cells. In more than 80% of 124 recently published protocols, induction of SE required the presence of auxins alone, or in combination with cytokinins (CKs) (Gaj 2004). The auxin most frequently used to initiate in vitro SE is the synthetic auxin 2,4dichlorophenoxyacetic acid (2,4-D), also known for its herbicide activity. Naphthalene acetic acid (NAA), indole-3-acetic acid (IAA), indole-3-butyric acid (IBA), Picloram and Dicamba are used to a lesser extent (Raemakers et al. 1995).

The mode by which 2,4-D efficiently induces E competence remains unclear. On the one hand, 2,4-D could regulate SE through its strong auxinic activity, either directly or indirectly, by influencing the endogenous metabolism of other phytohormones (Sect. 5). On the other hand, 2,4-D could act as a strong stressor leading to SE, considered by some authors as an extreme stress response of cultured plant cells (reviewed by Fehér et al. 2003). This hypothesis is supported by the fact that several stress treatments can trigger SE (reviewed by Gaj 2004).

In most instances in which CKs induced SE, they were added to the culture medium together with auxins (Gaj et al. 2004). However, in some cases, the addition of CKs as the sole source of PGR is sufficient to generate somatic embryos (Bronner et al. 1994; Iantcheva et al. 1999). The most commonly used CKs in culture are N^6 -benzylaminopurine, kinetin, zeatin and, more recently, thidiazuron.

There are only a few reports of abscisic acid (ABA) acting as an effective inducer of SE, in most cases by producing somatic embryos directly on the surface of the explants (Bell et al. 1993; Charrière and Hahne 1998). In a relatively recent work, Nishiwaki et al. (2000) reported the formation of somatic embryos from carrot seedlings cultured on a medium containing ABA as the

sole source of PGRs. In this work, the number of embryos induced per number of seedlings was dependent on the seedling age as well as on the ABA concentration in the medium.

The effect of exogenously applied gibberellins (GAs) on induction of SE is highly variable in different species or tissues. For example, exogenous gibberellic acid (GA₃), the most commonly used synthetic GA, stimulated embryogenesis in both chickpea immature cotyledon cultures (Hita et al. 1997) and *Medicago sativa* tissue cultures (Ruduś et al. 2002), whereas it was detrimental to somatic embryo formation in geranium hypocotyl cultures (Hutchinson et al. 1997) and in *Citrus* ovule callus (Kochba et al. 1978). In carrot, the effect of GA on SE is also controversial. Tokuji and Kuriyama (2003) reported that GA₃ inhibited embryogenesis at the globular stage, while uniconazole, a GA biosynthesis inhibitor, promoted secondary embryogenesis when embryos were induced directly from carrot hypocotyl segments. In contrast, Mitsuhashi et al. (2003) observed that exogenous treatment with uniconazole caused a reduction of both the number of the developed embryos and the size of the torpedo-shaped embryos. These abnormalities in the latter case were prevented by GA₁ or GA₄ application.

There are several reports that support the inhibiting effect of external application of ethylene on induction of SE (reviewed by Minocha and Minocha 1995; Nomura and Komamine 1995; Thorpe 2000), while others indicate a neutral role (Roustan et al. 1994).

2.2 PGRs on Progression of SE

In most protocols in which auxins act as an efficient inducer of SE, development of somatic embryos is achieved by reducing or removing auxin from the culture medium. To explain this result, it was proposed that continuous exposition of explants to high exogenous auxin levels interferes with the polar auxin gradient that is normally established during embryogenesis, preventing the correct apical-basal embryo patterning (Schiavone and Cooke 1987; Liu et al. 1993).

The importance of polar auxin transport (PAT) in embryo morphogenesis was demonstrated by treating different stages of carrot somatic embryos with the PAT inhibitors 2,3,4-triiodobenzoic acid (TIBA) and N-(1naphthyl)phthalamic acid (Schiavone and Cooke 1987; Cooke et al. 1993). Both inhibitors blocked the ability of somatic embryos to undergo morphogenic transitions to the subsequent stages. In a more recent experiment, Tokuji and Kuriyama (2003) treated carrot hypocotyls, in which SE was directly induced with a 24-h pulse of 2,4-D, with TIBA and 2,4,6trichlorophenoxyacetic acid, another inhibitor of PAT, and found inhibition in the development of the somatic embryos, but not in the frequency of SE.

As will be pointed out later in this review (Sect. 3.2), formation of an auxin gradient appears to be necessary to establish bilateral symmetry dur-

ing the initial steps of embryogenesis, a requisite for further development of the embryos (Schiavone and Cooke 1987; Liu et al. 1993; Fischer and Neuhaus 1996).

An exogenous supply of CKs during the expression phase has produced ambiguous results. While some reports indicate an inductive role of CKs during progression of SE (e.g., Fujimura and Komamine 1975; Sagare et al. 2000), the contrary has also been described (Li and Demarly 1996). As mentioned later, CKs seem to play an important role in cell division, rather than in embryo differentiation (Danin et al. 1993).

Addition of GAs during progression of SE has also shown confusing outcomes. On one hand, it stimulated embryo development in chickpea, *Iris germanica* and *M. sativa*, while on the other hand, it inhibited this event in carrot, mandarin, orange and anise (Ruduś et al. 2002 and references therein). Later in the progress of SE, it was observed that in some species normally showing dormancy, adding GA₃ promotes germination and conversion of somatic embryos into plants (reviewed by Gaj 2004).

Maybe the most relevant effect of ABA during progression of SE has been reported for conifers. In this plant group, development of somatic embryos has to be stimulated by exogenous addition of ABA (reviewed by Dong and Dunstan 2000; Stasolla et al. 2002). A more general effect of ABA has been observed during maturation of somatic embryos in numerous species, especially, but not restricted to, conifers (Mauri and Manzanera 2004; Sharma et al. 2004). Indeed, similarly to the effect produced by the natural increase of endogenous ABA in zygotic embryos, the addition of ABA into the culture medium induces a reduction in precocious germination and an increase in the number of mature somatic embryos. However, an extensive duration of the treatment could influence negatively conversion of mature embryos into plantlets (von Arnold et al. 2002).

Again, there is a limited number of reports on the effect of addition of ethylene on the progression of SE. In one of them, Roustan et al. (1994) observed an arrest in embryo development only when ethylene was applied during the first 7 days in the expression stage of carrot SE. When this compound was included after that moment, no effect was evident.

3 Is E Competence of Explants Determined by Endogenous Hormones?

3.1 The Situation in Donor Explants

Some attempts have been made to associate the endogenous hormone contents of donor plant tissues, on one hand, and of callus or cell suspension cultures derived from them, on the other, with their E competence. Concerning the donor tissues, there are several works that report differences among responsive and unresponsive explants, and thus support the participation of endogenous plant hormones on E competence. In this way, a correlation between higher endogenous IAA concentrations and an increased E response was reported in leaves of alfalfa (Ivanova et al. 1994), *Pennisetum purpureum* (Rajasekaran et al. 1987a) and *Dactylis glomerata* (Wenck et al. 1988), as well as in immature zygotic embryos of wheat (Kopertekh and Butenko 1995) and sunflower (Charrière et al. 1999; Thomas et al. 2002).

A relationship between the levels of ABA and the E competence of the initial explants was reported in the aforementioned work of Kopertekh and Butenko (1995) and also by Jiménez and Bangerth (2001a), both in wheat. The latter authors suggest that the effect of ABA on competence might occur by reducing precocious germination and then indirectly favoring callus formation. Similarly, Rajasekaran et al. (1987b) found higher concentrations of ABA in E than in nonembryogenic (NE) leaf sections of *P. purpureum*, while Ivanova et al. (1994) found the opposite in equivalent tissues of *M. falcata*. Additional support for the positive role of endogenous ABA in determining E competence of the donor tissues derives from the results of Senger et al. (2001), working with *Nicotiana plumbaginifolia*. They reported that both transgenic plants that overexpress an anti-ABA single-chain variable fragment antibody and mutants that have a defect in the ABA synthesis rate exhibit abnormal morphogenesis at preglobular embryoid formation. This phenotype could be reversed by simple exogenous ABA application.

Concerning CKs, lower levels of total CKs were observed in competent tissues in leaves of *P. purpureum* (Rajasekaran et al. 1987a) and *D. glomerata* (Wenck et al. 1988), as well as in immature zygotic embryos of wheat (Kopertekh and Butenko 1995), than in their noncompetent ones. Sometimes the factor to be considered is not the pattern of total CKs, but the levels of individual members of this group of plant hormones. For example, even though Centeno et al. (1997) did not find differences in the total amounts of CKs between competent and noncompetent genotypes of *Coryllus avellana*, they reported differences in the contents of the individual CKs evaluated.

Supporting the positive role of CKs during induction of SE, Tokuji and Kuriyama (2003) reported that purine riboside, an anti-CK, severely inhibited SE from epidermal cells of carrot. This effect was counteracted by the simultaneous application of zeatin riboside, suggesting that CKs are involved in the very early stages of SE, such as the formation of E cell clumps. These findings support the concept, mentioned before, that CKs have a role in cell division rather than in embryo differentiation (Danin et al. 1993).

Regarding GAs, there are contrasting reports about the role played by endogenous levels of this hormone in donor explants. There are several publications that do not show differences in GA levels in genotypes differing in their E competence (Jiménez and Bangerth 2001a, b), an indication of the minor role these compounds might play during this phase. Supporting these findings, Rajasekaran et al. (1987a) observed that paclobutrazol, an inhibitor of GA synthesis, did not alter E nature of *P. purpureum* explants. However, other works suggest a negative role of endogenous GAs on E competence (Hutchinson et al. 1997).

Further evidence against a relationship between endogenous plant hormones in donor explants and their E competence comes from studies in maize (Jiménez and Bangerth 2001b) and asparagus (Limanton-Grevet et al. 2000) genotypes in which it was not possible to identify differences in the endogenous hormone contents in genotypes having different E capacity. Additionally, immature zygotic embryos of barley that contained variable IAA and GA levels displayed a similar degree of competence (Jimenez and Bangerth 2001c).

3.2 The Situation in Cultures with Distinct E Capacity

Some divergences have also been reported when endogenous hormone contents were evaluated in callus and cell suspension cultures varying in their degree of E capacity. Most works conducted with this purpose support the occurrence of higher auxin levels in E than in NE cultures (reviewed by Jiménez 2001). However, in other works, no differences in the endogenous auxin contents could be established between E and NE cultures (Besse et al. 1992; Michalczuk et al. 1992a). It was postulated that high endogenous auxin contents help to set up the auxin gradient necessary to establish bilateral symmetry during zygotic and SE (Schiavone and Cooke 1987; Liu et al. 1993; Fischer and Neuhaus 1996).

Higher levels of total CKs have been reported in NE than in E callus of *P. purpureum* (Rajasekaran et al. 1987a) and of *M. arborea* (Pintos et al. 2002). In addition, similarly to the aforementioned report of Centeno et al. (1997), Guiderdoni et al. (1995) found differences in the contents of individual CKs between E and NE callus cultures, in sugarcane. However, in spite of the previous reports, some researchers argue that CK levels are probably more related to the growth of the callus cultures than to the E competence (reviewed by Jiménez 2001).

A similar scene to the one described for auxins is found in ABA: even though the majority of publications support higher levels of this plant hormone in E than in NE cultures (reviewed by Jimenez 2001; Nakagawa et al. 2001), the contrary was reported for *Hevea brasiliensis* (Etienne et al. 1993) and alfalfa (Ivanova et al. 1994) cultures. A completely ambiguous situation is found in GAs, where higher levels of this hormone were found in E than in NE cultures in some works, while the contrary was found in others, whereas no differences were reported in some other publications (reviewed by Jimenez 2001).

Since ethylene quantification within the tissues is a very difficult task, indirect information about the role endogenous contents of this plant hor-

mone might play in determination of the E potential of cultures comes from experiments using inhibitors of ethylene synthesis and action. Most works on this subject indicate that ethylene plays a negative role on induction of SE (reviewed by Thorpe 2000). However, in a carrot line in which ethylene promoted SE, the use of inhibitors of biosynthesis also slightly inhibited SE (Nissen 1994).

Because spatial information is lost during global quantification of endogenous hormones, researchers have tried to obtain a precise localization of plant hormones within the tissues. This can only be achieved with the help of in situ techniques, such as immunolocalization. Whereas analytical methods for quantifying plant hormones have been strongly improved during recent years, in situ specific detection of these compounds has been more difficult. As an example, despite auxin having proven to be a difficult molecule to localize in tissues, being highly diffusible and occurring in both active and inactive (conjugated) forms (Normanly and Bartel 1999), successful immunohistochemical localization of IAA has been recently reported (Moctezuma 1999; Moctezuma and Feldman 1999; Aloni et al. 2003), including a report during early phases of SE (Thomas et al. 2002).

4 How Do Endogenous Hormone Contents Evolve in the Progress of SE?

Several studies aiming to evaluate the way endogenous hormone concentrations change during development of SE, specifically after expression has been induced, have been carried out. In some of them, the initial stages of embryo development have been analyzed, i.e., before the first morphological changes had occurred, but when biochemical and physiological determination of embryo development has already started (Dodeman and Ducreux 1996). The other group of studies focused on the later phases of embryo development, when it is possible to synchronize and separate the different embryo stages through a series of steps of sieving and centrifugation (reviewed by Osuga et al. 1999; Sharma 1999). Synchronization of E cultures allows a more accurate estimation of the hormone status in each phase of embryo development.

Endogenous contents of most hormones remained steady or showed only minor changes during the first 7 days after 2,4-D had been eliminated from the medium in carrot E cultures (Fujimura and Komamine 1979; Michalczuk et al. 1992a; Jiménez et al. 2005); only increased contents of the polyamines putrescine, spermidine and spermine have been, to the best of our knowledge, reported (Feinberg et al. 1984). In citrus E cultures, in which expression of SE was triggered by a stimulus other than reducing the auxin content in the medium, auxin and CKs accumulated within the first 5 days after sucrose had been replaced by glycerol in the culture medium, the triggering factor, while the levels of ABA and GAs remained stable (Jiménez et al. 2001). When studying evolution of endogenous hormones in SE after the first morphological changes had occurred, Michalczuk et al. (1992a) reported that auxin levels decline steadily after the globular stage in all subsequent stages of embryo development. Additional information, in their case for ABA, was provided by Kamada and Harada (1981). They found that, after remaining low during the first 7 days of culture in the absence of 2,4-D, the concentrations of ABA increased during further development of carrot somatic embryos until day 10, and then decreased. Similarly, Rajasekaran et al. (1982) found that ABA levels in hybrid grapevine somatic embryos decreased from the globular to the mature stage. The role of endogenous ABA has been more evident during the latter stages of embryo development, especially during maturation and germination. In this sense, Kermode et al. (1989) and, recently, Prewein et al. (2004) related an increase in germination to a reduction in ABA content in the tissues, while Finkelstein et al. (1985) related the beginning of germination to a change in the sensitivity of the tissues to this plant hormone.

Information regarding GA content during the final phases of somatic embryo development originates from two early works (Noma et al. 1982; Takeno et al. 1983). In the first one, polar and less polar GA contents were compared during this phase and lower levels of polar and higher levels of less polar GAs were found, while in the second, a reduction in the levels of free and highly soluble GA-like substances on a dry weight basis was observed during embryo development.

Endogenous ethylene increased at day 1 after transferring somatic embryos of white spruce into the maturation medium, and then declined transiently and increased again gradually, in the second half of the culture period (Kong and Yeung 1994). Concerning polyamines, very recently, Minocha et al. (2004) found a correlation in the relationship of several members of this plant hormone group with the developmental stage of red spruce somatic embryos.

5 PGRs Acting on Endogenous Hormones During SE

The mode of action of PGRs involves modulation of endogenous plant hormone concentrations, among other effects, a process that may occur directly, through synthesis of enzymes, or indirectly, with the intervention of effectors (Thorpe 2000; Gaspar et al. 2003; Gazzarrini and McCourt 2003). An exogenous PGR can, positively or negatively, modulate internal concentrations of plant hormones belonging to the same as well as to other groups.

Examples of exogenous PGRs modulating levels of endogenous hormones of the same group in SE include the accumulation of endogenous IAA in soybean hypocotyl explants after treatment with the synthetic auxins NAA and IBA (Liu et al. 1998). Also, using gas chromatography/mass spectrometry, Michalczuk et al. (1992a, b) showed that carrot cells treated with 2,4-D accumulate large amounts of endogenous IAA during SE. Further evidence in this sense is provided by the increase in the IAA levels observed in alfalfa leaf protoplasts cultured in the presence of 2,4-D (Pasternak et al. 2002). Moreover, Ceccarelli et al. (2002) found that two variant cell lines of carrot, capable of growing in high concentrations of 2,4-D and that showed disturbances in embryogenesis, raised the level of free IAA in response to the high exogenous auxin concentration.

Modulation of endogenous hormone levels by exogenous PGRs belonging to a different group has also been documented during SE. For example, application of ABA to immature zygotic sunflower embryos increased levels of endogenous IAA (Charrière et al. 1999). Moreover, high levels of exogenous ABA decreased ethylene contents during maturation of somatic embryos of white spruce (reviewed by Stasolla et al. 2002). There is also evidence, from a very early work, for 2,4-D regulating the rate of polar and less polar GAs (Noma et al. 1982).

It is suggested that the mechanism by which thidiazuron induces SE in peanut involves modulation of endogenous levels of auxin and CKs (Murthy et al. 1995). Moreover, the impairment in progression of embryo development caused by 2,4-D in carrot might be related to the increase in ethylene synthesis caused by the high levels of exogenous auxin (Minocha and Minocha 1995). Concerning polyamines, it has been observed that exogenous auxins suppressed the activity of two polyamine biosynthetic enzymes in carrot cultures, the effect of 2,4-D and IAA being distinct (Feinberg et al. 1984). Interaction of polyamines with other hormones has been reviewed by Kakkar and Sawhney (2002).

6 Concluding Remarks

Even though there are several factors that induce and govern SE in plants, the evidence available indicates that plant hormones, in response to the exogenous PGRs applied, or acting independently, in those few systems in which PGRs are not necessary for this process to occur, play a significant role. Together with the concentration of individual hormones, the interaction between members of different groups and the sensitivity/responsiveness of the tissues and cells (a factor not covered in this review) seem to condition the responses observed (Dudits et al. 1995; Thorpe 2000).

More than 10 years ago, when the first review articles involving quantification of endogenous hormones were published, it was postulated that knowing the endogenous hormone contents and their relation to the E competence of the explants would permit the induction and expression of SE in recalcitrant genotypes. That would take place through amendments to the culture medium, with substances that may mimic the inductive condition (supplying a deficiency or counteracting an excess) (Merkle et al. 1995). However, even though several works characterizing hormone status in responsive genotypes and E cultures have been published, most new publications defining adequate conditions to induce and allow progress of SE are still based on trial and error, as indicated at the beginning of the present review (Sect. 1).

Despite the progress achieved during the last few years in understanding the mechanisms involved in hormonal signaling of SE, there are still many aspects that are not fully understood and need to be studied in more detail. Progress is currently being achieved in comprehending the molecular responses that PGRs and plant hormones generate, mainly in gene expression (Thomas and Jiménez, this volume). It is to be expected that this alternative way to study hormonal regulation of SE will bring new insights on the subject.

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