INVITED PAPER

Webster S.S. Jee

The past, present, and future of bone morphometry: its contribution to an improved understanding of bone biology

Abstract It was not until the 1950s that a better paradigm for bone biology evolved, which led to the birth of bone histomorphometry. Two clinicians, Harold Frost (1958- 1964) and Lent Johnson (1964), were responsible for the paradigm stating that the primary function of bone is mechanical load bearing with subsidiary function to participate in plasma calcium homeostasis to support hematopoesis. Dynamic bone histomorphometry was born when Milch et al. (1958) discovered bone localization of tetracycline and Frost generated the methodology to study tetracyclinebased dynamic histological analysis of cortical bone remodeling (1961-1965). Dynamic bone histomorphometry did not blossom until Frost, while a Sun Valley Workshop participant, developed it to address trabecular bone dynamics. The combination of Arnold (1948) producing thin sections of plastic-embedded undecalcified bone and Frost's (1977- 1983) modification of dynamic cortical bone histology for cancellous bone made it possible to study tetracyclinebased dynamic histomorphometry of cancellous bone. It led to the better understanding of basic metabolic unit (BMU) remodelling and to Frost's mechanostat hypothesis, and characterized the rat model to accelerate the development of several drugs in the treatment of bone diseases. Currently, dynamic bone histomorphometry has contributed to studies in bone's mechanical usage windows, mechanical usage setpoint hypothesis, muscle-bone relations, marrowbone relations, the Utah paradigm of musculoskeletal physiology, apoptosis, genetics (transgenic mice) and bone structure, bone quality, the lacunocanalicular network and bone modelling, and remodeling hypothesis, osteocyte role as mechanosensory, chemosensory, and regulatory in bone maintenance, targeted and untargeted remodeling, the role of permissive agents, etc., items in bone biology expounded briefly by Lent Johnson (1965) and continuously by Harold

W.S.S. Jee (\boxtimes)

Frost at the Sun Valley Workshop (1965-2003). Finally, "What's next?" covers how to improve and perpetuate the employing of qualitative histomorphometry in research opportunities in hard tissue research.

Key words Dynamic histomorphometry · Skeletal adaptation to mechanical usage - Mechanostat • Utah paradigm of skeletal physiology • What's next?

Introduction

It was not until the 1950s that a better paradigm evolved for bone biology that led to the birth of a new paradigm of skeletal physiology. The paradigm stated that the primary function of bone is mechanical load bearing with subsidiary function to participate in plasma calcium homeostasis and to support hematopoesis. The new paradigm emerged from studies on the morphology and dynamics of bone cells and tissue in growth, modeling, and remodeling, the osteocyte as mechanoreceptor, fatigue and microdamage repair, biomechanical influence on bone adaptation, maintenance and turnover, transient and steady-state conditions, musclemarrow-bone relations, osteonal bone remodeling, and tissue changes in aging and select bone diseases by two clinicians. One is Lent Johnson, a pathologist, and the other is Harold Frost, an orthopedic surgeon (Fig. 1).

These two individuals were different Lent Johnson published fewer than half a dozen, but lengthy, bone review articles [1-5]. His main contribution was his Henry Ford symposium article entitled "Morphologic analysis in pathology: the kinetics of diseases and general biology of bone" [2].

After the articles, Lent published a few review articles on bone cancer and was known as the world expert on bone tumors. Harold was different. During the 1950s and 1960s, his extensive and innovative publications mainly appeared in the Henry Ford Hospital Bulletins [6-13] because most scientific editors viewed his findings as unreliable and/or controversial. Harold went on to publish nearly 500 articles

Radiobiology Division, University of Utah School of Medicine, 729 Arapeen Drive, Suite 2338, Salt Lake City, UT 84108-1218, USA Tel. + 1-801-581-6366: Fax + 1-801-581-7008 e-mail: webster.jee@hsc.utah.edu

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Fig. 1. Harold Frost is seated on the front row, fourth from the left *(oval outline)* and Lent Johnson is standing on the left on the back row *(circle).* The others seated are Talmage, Belanger, Jee and Gruelich

and 16 books that made contributions to skeletal biology and metabolic bone diseases which had a profound impact on the field. He also was a mentor to countless clinicians and basic scientists.

From the few non-peer-review articles by Lent Johnson, it was obvious he had a tremendous grasp of bone biology. He viewed the skeleton as "a record of past events and an oracle of future behavior." Table 1 lists the aspects of bone biology on which Lent expounded in his 1964 article [2], topics that are under active research currently. In my opinion, his greatest contribution was his attempt at the theoretical biology of the skeleton to tie together what he viewed through the microscope. His bone biology encompassed every bit of the cycled removal and renewal, explains how mechanical, circulation, and metabolic stress signals the adaptive modification of bone that accounts for the cell modulations which are activated in response to the signal under renewal cycle, rate of activity, continuity of activity, mechanical, circulatory, and metabolic signals, collaborating, metabolic, and general principles, cell modulation and cell, and field and constitutional interplay. Needless to say, his bone biodynamic article should be required reading for bone researchers.

Table 2 lists Frost's bone findings culminating in what he called "connecting the dots" or what I call "solving the

puzzle or mystery" that led to the "mechanostat hypothesis" and the ever-evolving Utah paradigm of skeletal physiology of load-bearing bones [649]. In my opinion, the best of Harold was his astute contribution to our understanding of activation, resorption, and formation (ARF) of the basic multicellular unit (BMU) concept of bone remodeling, the development of dynamic histomorphometry of cancellous and cortical bones, the "mechanostat hypothesis," and the Utah paradigm of skeletal physiology and microdamage and repair. A brief history and the current status of these concepts follow.

The activation-resorption-formation and basic multicellular unit in bone remodeling dogmas

The activation, resorption, and formation and basic multicellular unit concepts in adult bone remodeling came about in 1957 when Frost reported a method to generate thin undecalcified cortical bone specimens rapidly. He discovered that with some waterproof sandpaper he could make rib cross sections in 10min. In his material he was able to observe cement lines of which 95% were scalloped, a record of osteoclastic activity. From his findings, he

"The skeleton is a record of past events and an oracle of future behaviors"

- Mass and surface relation of cancellous and cortical bone
- Periosteal bone growth a renewed apposition in aging
- Changes with aging in the character of adult cortex cancellation next to marrow
- Osteon and cortical remodeling
- Osteoblasts cycle
- Interplay of muscle, marrow, and bone
- Lipogenic skeletogenic relationship
- Hematopoetic and fatty marrow relationship
- Circulation in bone: positive-osteoblastic; passive-osteoblastic
- Glomoid system adapts circulation to bone needs
- Lipogenic skeletogenic relationship
- Mechanics and bone (disuse, stress, fracture)
- Transient and steady state responses
- Osteocyte as mechanosensor
- Osteocyte sequences
- Fatigue damage
- Articular remodeling and osteoarthritis
- Bone remodeling and osteoporosis
- Muscle and hip dysplasia
- Genetics and growth
- Theoretical biology of the skeleton that encompasses every bit of the cycled removal and renewal, explains how mechanical circulation and metabolic stress signals the adaptive modification of bone, which accounts for the cell modulations that are activated in response to the signal:

Renewal cycle Rate of activity Continuity of activity Mechanical, circulating, and metabolic signals Collaborating, metabolic and general principles Cell modulation Cell, field, conditional interplay

Source: From Johnson L (1964) Morphologic analysis in pathology: the kinetics of diseases and general biology of bone. In: Frost HM (ed) Bone Biodynamics. Little Brown, Boston, pp. 543-644, [2]

Table 2. Harold M. Frost's findings

Table 2. *Continued*

Source: Summarized from nearly 500 articles: a partial listing is found in the reference section [6-49]

deduced that in adult bones, bone resorption preceded bone formation and that the two activities were coupled. This finding led to the addition of activation, resorption, and formation (ARF) and basic multicellular unit (BMU) to his concepts of bone remodeling [13,48]. Frost's BMU concept first appeared in one of his books [13], and the concept began to be widely accepted, but not until the late 1970s. Parfitt stated in the landmark article in the

Journal of NIH Research, as holds true even today: "There are still a lot of people who pay lip service to it because it has now become the current dogma but who do not incorporate it into their thinking. You see this particularly in people who study the skeleton by measuring bone density--they rarely make an effort to think how their observations relate to what is actually going on inside the skeleton" [50].

The dynamic bone histomorphometry of cancellous and cortical bone and the tissue-level response

In 1957, Milch, Rall, and Tobie [51] reported that tetracycline antibiotics will deposit in vivo in sites of bone formation and subsequently can be studied in undecalcified sections by fluorescent microscopy. This led Frost [14,15] and others, Amprino and Marotti [52] and Hass et al. [53], to develop a number of tetracycline-based approaches to the histological studies of bone remodeling. Frost was the first to exploit the analysis of tetracycline-labeled bone in a systematic manner from his human rib biopsy specimens. His double-labeled rib specimens allowed him to develop data measurements at the microscope into physiologically meaningful formation and resorption rates and into tissuelevel parameters such as activation frequencies, remodeling, formation and resorption periods, and bone turnover of compacta [6,14-16]. There was no wide acceptance of Harold's approach to his study of cortical bone histomorpometry because not many investigators harvested human rib bone biopsy specimens that were sequentially in vivo labeled as Frost performed in mass production.

The technology of dynamic bone histomorphometry did not blossom until Frost extended his dynamic cortical bone histomorphometry to cancellous bone. It was the combination of the feasibility of a Frenchman named Phillip Bordier and the popularity of obtaining transilial bone biopsies [54,55], plus a development in the late 1940s by a radiobiologist named James Arnold producing reliable thin plastic-embedded cancellous bone samples for histological sectioning and its application to radioautoradiography [56,57], that made it possible to readily analyze cancellous bone tetracycline-based dynamic histomorphometry, which Frost also developed [17-21,43]. James Arnold and coworkers used his plastic-embedded undecalcified thin bone sections to perform autoradiographs for the study of boneseeking radionuclides [56-58]. The methodology produced excellent histology sections, exceeding decalcified paraffinembedded and ground undecalcified bone sections in quality as well as retaining the mineral in which radionuclides and fluorescent antibiotics localized. By 1964, Frost had perfected his analysis of cortical bone histomorphometry [14], but there was a need to modify his cortical bone histomorphometry for cancellous bone to analyze the cancellous bone-dominated human transilial biopsy. The stimulus for the modification came about from the interest of the Upjohn Company to evaluate the effect of 25 dihydroxyvitamin D_3 in the treatment of renal dialysis patients [43]. The experimental design called for the analysis of cancellous bone histomorphometry in sequential transilial biopsies. Frost accomplished this task in record time [17-20]. The technology gained wide acceptance by clinicians and basic scientists as an essential tool to assess the tissue-level organization of bone, the dynamic aspects of osteoblastic and osteoclastic functions, the pathophysiology of osteopenias and osteoporoses, the efficiency of treatment, and the safety and mechanisms of action of new therapuetic agents, etc. [59-61]. Furthermore, the technol-

ogy improved our understanding of basic multicellular unit (BMU) remodeling, skeletal adaptation to mechanical usage, the "mechanostat hypothesis" and the Utah paradigm of skeletal physiology in preclinical bone studies.

The mechanostat hypothesis

The mechanostat hypothesis is based on the idea that bone senses its mechanical environment and can adapt to it. The first demonstration of bone responses to its mechanical environment was by Koch in 1917 [62]. The first suggestion that strain might be the causative stimulus was Thompson in 1917 [63], while much later Lanyon and Smith [64] pioneered experiments measuring bone strains in living animals. In the 1960s, Frost was one of a few orthopedic surgeons interested in bone and joint mechanics when he published one article and a book on joint-bone biomechanics [11,26]. During that period, Johnson in his Bone Biodynamic opus reported his impressions of bone mechanics and its adaptive responses to disuse, stress, and fracture in addition to stating the osteocyte as a logical mechanosensor [2].

Frost first heard the idea of a "mechanostat" applied to bone at a Gordon Conference about 1957. There originators were W.D. Armstrong, F.C. McLean, A. Reifenstein, and I. Snapper (Fig. 2), all long deceased, so the idea died and was buried. By 1987 Frost "dug up the "mechanostat" coffin, exhumed and published its contents and admitted he undeservedly received most of the credit for it" [65]. The mechanostat hypothesis is based on the idea that minimum effective strains must be exceeded to excite a positive adaptive response to mechanical overloading. He suggested there are strain thresholds or windows that will evoke no response, "E"; strains above this E threshold will evoke a positive adaptive response (i.e., modeling-dependent bone gain) and strains below the no-response threshold will cause a negative adaptive response (i.e., disuse mode remodelingdependent bone loss) [24,25]. Similar adaptive thresholds or window values were suggested by Carter et al. in 1981 [66] and Cowin in 1984 [67]. In addition, there are pathological strain thresholds (i.e., for microdamage) and threshold for fractures (Fig. 3). In total, one can visualize Frost's "general biomechanical relation" thresholds of fracture incidence (Fx) > minimum effective strain pathological (MESp) > minimum effective strain for modeling $(MESm) > E$, the normally adaptive or the response threshold $>$ minimum effective strain for disuse mode remodeling. The mechanostat also contains the "baseline conditions" created at birth that include the basic bone anatomy and anatomical relationships, neurological, muscular, and circulatory physiology, the minimum effective strain setpoint, and the biological machinery that adapts bones to mechanical usage. The biologic machinery includes (1) modeling by formation and resorption drift that can increase bone strength (modeling-dependent bone gain) "mass" and strength; (2) disuse-mode BMU-based remodeling that removes bone next to marrow (remodelingdependent bone loss in "mass" and strength); and (3) the

Fig. 2. F.C. McLean (2) , A.C. Reifenstein (3) , and W.D. Armstrong (5) seen at the Fifth Conference on Metabolic Interrelations, New York City, January 5-6, 1953; I. Snapper was not in attendance. *Source:* from

Fig. 3. A diagram illustrating the relationship of stains and adaptive responses, a key component of the "mechanostat: minimum effective strain *(MES)* for remodelling (r), modelling (m), pathology (p), and fracture (Fx); windows or threshold for disuse *(DW),* adapted *(Aw),* mildly overloaded *(MOW),* and pathological overload *(POW)*

error-driven negative mechanical feedback loop, aided by signaling systems that detect and process signals (i.e., mechanotransduction) for threshold ranges of MESm for modeling MESr for disuse-mode remodeling to help switch the two functions on and off. In addition, Frost factored in the mechanostat, the influence of muscle function, and nonmechanical agents [24,25,31,37,40,68]. The nonmechanical agents (drugs, diet, hormones, genetics, diseases, etc.) can change the mechanostat's setpoints of its various biological activities and adaptation. Thus, after the minimum effective strain threshold or setpoint decides if an adaptation is necessary, it causes the appropriate mediator mechanisms (i.e., modeling, remodeling, microdamage, and fracture repair) to achieve it, usually under the error-driven negative mechanical feedback loops (Fig. 4).

Metabolic Interelationships with special reference to Reifenstein EC (ed) (1954) Calcium. Josiah Macy Jr. Foundation, New York, p. 8

Frost's hypothesis is based on the idea of a minimum effective strain that must be exceeded to excite a positive adaptive response (i.e., increase bone "mass" and strength) to mechanical overloading [23-25,30,31,36,37]. In contrast, a minimum effective strain below the no-response or adapted threshold excites a negative adaptive response (i.e., decreases bone mass and strength) that is similar to a room that is too cold, which activates the thermostat to turn on the furnace to warm the room (i.e., increase bone mass and strength); when a room is too warm, another thermostat will be turned on to kick in the air conditioner to cool the room (i.e., decrease bone "mass" and strength). This analogy to the room thermostat persuaded Harold to name the bone biological machinery involved in adaptation to mechanical environment the mechanostat for load-bearing bones.

The osteocyte, microdamage, and repair revisited

Currently it has become clear that (1) physiological strains continually produce fatigue damage in bone; (2) this damage weakens bone and is associated with both osteocyte apoptosis and the activation of remodeling; and (3) remodeling is the only means by which this damage can be removed and repaired [69-76]. The highly significant nature of these events has intrigued the author to revisit osteocyte function and death and microdamage physiology.

Harold Frost was the first to demonstrate microscopic cracks (i.e., microdamage) in human cortical bone, interpreted as fatigue cracks detected by bulk staining with basic fuschin, and suggested the osteocyte as detector of microdamage and somehow stimulated BMU creation to Fig. 4. The mechanostat *(in bold letters')* with its mechanical feedback loops. The nonmechanical agents can act in a permissive manner or directly to modulate or attenuate the mechanical loading response

• Base line conditions: bony anatomy and relationship, basic neuromuscular anatomy and physiology; biologic "machinery" for bone adaptation; and genetically determined threshold (set point) range for modeling and remodeling.

repair them [10,22]. He further indicated that disruption of canalicular connections could provide the stimulus for activating remodeling. At the same time Johnson reported overuse may lead to bone resorption as observed in stress fracture [2]. Soon after, Jim Arnold was the first to demonstrate cancellous bone microfracture repair in human vertebral body deformation and crush fracture observed as trabecular microcallus [77,78]. Thus, these three pioneers were the ones who initiated the current interest in microdamage that Burr, Martin, Schaffler, and coworkers revisited with experimental evidence that there was bone remodeling in response to in vivo fatigue microdamage [70-74,79-86]. Furthermore, both Harold Frost and Lent Johnson earlier observed osteocyte death. Harold saw dead "micropetrotic" bone in elderly adults when the osteocytes died, and most of their lacunae and canaliculae became filled with mineral. The dead micropetrotic bone accumulated microdamage [9]. Lent Johnson described the aging osteocyte sequence involving ossification of canaliculi, pyknosis, and disintegration with or without ossification of lacunae or oncosis with lacunar and canalicular enlargement and filling with lamellar bone [2]. In addition, they both postulated the osteocyte as the logical choice as the mechanosensor to mechanical usage. Currently, osteocyte death (apoptosis) is associated with aging [87,88], estrogen deficiency [83,89], excessive glucocorticoid [90,91], disuse state [75,92,93], and microdamage [76,94] that all led to a reduction in bone strength.

The hypothesis of the osteocyte three-dimensional cellular network as the mechanosensory organ of bone has generated several concepts that explain adaptive modeling and remodeling at the level of cells, osteons, and trabeculae. These models are generally in agreement with Frost's mechanostat hypothesis. There is growing support for the formation of canalicular interstitial fluid as the likely stress-derived factor that informs the osteocyte about the level of bone loading; thus, the canaliculi are the bone porosity of interest and the osteocytes, the mechanosensor cells [82,95-101].

Marotti et al. [102] were the first to quantitate the association of bone resorption activity of osteocytes and experimental disuse osteoporosis. This work was followed by their hypothesis that an inhibitory signal traveling through

canalicular processes from osteocytes to osteoblasts initiates recruitment of selected osteoblasts into osteoblast lineage - the mechanism of conversion of osteoblast to osteocytes [103-106]. Martin [107] further extended this theory, assuming that osteocytes display a general inhibitory effect on function. He theorized osteocytes send an inhibitory signal in response to mechanical loading to inhibit bone lining cells from activating remodeling. The theory proposes that a single kind of signal transmitted through cellular synctium of osteocytes, osteoblasts, and lining cells controls remodeling in response to mechanical loading and in the presence of events such as osteocyte death and hormonal fluctuations. Thus, remodeling would increase in a disuse state, as predicted by the mechanostat hypothesis and experimentally observed because strain-generated inhibitory signals would be diminished. Remodeling would be activated by mechanical damage (microcracks) along with osteocyte apoptosis, which interferes with both signal generation and transmission [73].

There is mounting evidence of Martin's theory that osteocytes display general inhibitory signals: (1) Maejuma-Ikeda et al. [108] reported a chick-derived protein that inhibits bone resorption; (2) Gowen et al. [109] showed that matrix extracellular phosphoglycoprotein (MEPE)/osteoblast/osteocyte factor 45 (OF-45) inhibits bone formation; (3) Lowik et al. [110] reported sclerostin is an osteocytederived negative regulator of bone formation; and (4) Gluhak-Heinrich et al. [111] showed a differential effect of mechanical loading in bone formation and resorption by osteocyte-derived dentin matrix protein 1 (i.e., the inhibition of resorption and transient inhibition of bone formation). Nevertheless, further studies are needed.

What's next?

The aim of this section is to improve the performance of current and future bone histomorphometrists and perpetuate the technology of bone histomorphometry as well as point the way for needed bone studies that contribute to a better understanding of bone biology and disorders.

Fig. 5. The ever-evolving Utah paradigm of skeletal physiology with the mechanostat *(in bold letters)* as its key component. The paradigm incorporates the influence of the central and peripheral nervous system, musculature, and nonmechanical agents. There is the need to factor the circulatory system, etc., in the paradigm

THE UTAH PARADIGM OF SKELETAL PHYSIOLOGY

There are numerous bone biology and disorders problems needing attention, but here are a few of my suggestions: (1) persuade bone morphometry societies to sponsor a repository for books on bone morphometry data across species (i.e., on maps of age-related bone formation, resorption, remodelling, and turnover rates, etc.) to aid investigators to study more relevant bone sites than the one of convenience: (2) require histomorphometrists to be more global by including more multiple bone sites (e.g., hematopoetic versus fatty, loaded versus nonloaded, active and passive circulation, etc.) in their studies; (3) lobby human-use committees to allow for more harvesting of human autopsy specimens that generated studies such as those by Arnold [77,78] and Fazzalari et al. [112,113]; (4) stimulate the development of a "super" animal model for osteoarthrosis and glucocorticoid-induced osteopenia like the rat ovariectomy model for estrogen deficiency-induced osteopenias; (5) initiate experimental studies of the forgotten osteoblast lineage cell - the bone lining cell (BLC) (e.g., provide more experimental evidence for Rodan and Martin's hypothesis that BLC are remodeling activators [114], Evert's hypothesis that BLC fills the role in coupling bone resorption to formation [115], and Martin's hypothesis that BLCs activate remodeling unless inhibited by an inhibitory signal [73,107]); (6) initiate studies on the marrow and periosteal mediator (e.g., Horiuchi et al. [116]) periostin; and (7) characterize the osteocyte-derived inhibitory factors of bone resorption (e.g., Heino et al. [117]: the osteocyte inhibits osteoclastic activity through transforming growth factor (TGF)-beta enhancement by estrogen). Finally (8), I had asked Harold Frost what he sees for the future: "Wide acceptance of the mechanostat hypothesis and suitable modification of dynamic bone histomorphometry to study and learn how to control all the body's mechanics and molecular histomorphometry studies to support remodeling BMUs and modeling drift in the context to explain tissue level phenomena." Last but not least (9), further modifications of the ever-evolving Frost's Utah

paradigm of skeletal physiology (i.e., involving the circulatory system, etc.) (Fig. 5).

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