Cryptogamie, Bryologie, 2009, 30 (1): 129-142 © 2009 Adac. Tous droits réservés

# A new key to the genus *Orthotrichum* Hedw. in Europe and the Mediterranean Region

Francisco LARA<sup>a\*</sup>, Ricardo GARILLETI<sup>b</sup>, Rafael MEDINA<sup>a</sup> & Vicente MAZIMPAKA<sup>a</sup>

<sup>a</sup>Departamento de Biología (Botánica), Facultad de Ciencias, Universidad Autónoma de Madrid. C/Darwin 2, E-28049 Madrid, Spain.

<sup>b</sup>Departamento de Botánica, Facultad de Farmacia, Universidad de Valencia. Avda. Vicente Andrés Estellés s/n, E-46100 Burjasot (Valencia), Spain.

(Received 10 May 2008, accepted 15 July 2008)

**Abstract** – An updated key for the identification of the 49 *Orthotrichum s.l.* taxa (45 species and 4 varieties) present in Europe, North Africa, Macaronesia and Western Asia, including the species in genus *Nyholmiella*, is provided. *Orthotrichum leblebicii*, described from Turkey, is synonymized with the Mediterranean *O. vittii*.

Bryophyta / Orthotrichaceae / Nyholmiella / Taxonomy / northern Africa / Macaronesia / western Asia

#### **INTRODUCTION**

In the course of the last two decades, bryological exploration of the Mediterranean basin and European areas subject to Mediterranean or sub-Mediterranean climate has contributed to the discovery of a relatively high number of new species and varieties within the genus Orthotrichum (Lara & Mazimpaka, 1993; Lara et al., 1994a, 1996, 1999b, 1999c, 2000a; Mazimpaka et al., 1999b; Draper et al., 2003). In addition, some taxa have been reinstated (Mazimpaka et al., 2000b; Cortini Pedrotti & Lara, 2001), and numerous chorologically relevant records have been published (Martínez-Abaigar et al., 1995; Lewinsky-Haapasaari et al., 1996; Mazimpaka et al., 1997, 1999a, 2000a; Garilleti et al., 1998, 1999, 2002; Heras & Infante, 1998; Sotiaux et al., 1998; Lara et al., 1999a, 2000b, 2001, 2003, 2004a, 2004b, 2008; Heylen & Walraevens, 2001; Papp & Sabovljevic, 2003; Akatova et al., 2004; Blockeel, 2004; van der Pluijm, 2004; Bardat & Boudier, 2006; Draper et al., 2006, 2008). Consequently the known range of many European species has been extended widely through the continent and the Mediterranean basin, even to areas where their presence formerly could not be expected. With the recent find of O. consobrinum Cardot in Turkey and Spain (Lara et. al., in preparation), and the synonymization of Orthotrichum leblebicii Erdağ, Kürschner & Parolly (see below), the genus Orthotrichum s. l. now comprises a total of 45 species and 4 varieties in the study area, and in

<sup>\*</sup> Correspondence and reprints: francisco.lara@uam.es

number of species it is one of the largest moss genera represented in Europe (Hill *et al.*, 2006) and surrounding territories.

For many years our research team has worked on a synthetic key of European and Mediterranean *Orthotricha*. The worldwide key for the genus by Lewinsky (1993) and that for Europe (Lewinsky-Haapasaari, 1995) are relatively recent and valuable contributions. However, they do not reflect the current state of knowledge of the genus in the Mediterranean. For recent changes, the key for Europe by Frey *et al.* (2006) is the most complete and updated one, but some taxa are not dichotomously treated. Other keys to this genus are available for Europe and surroundings (Pierrot, 1978; Lara *et al.*, 1994b, 2007; Cortini Pedrotti & Lara, 2001; Erdağ & Kürschner, 2002; Smith, 2004; Casas *et al.*, 2006), but all of them are partial and regionally circumscribed. After having tested a preliminary key distributed among several European colleagues some years ago, we now propose a new dichotomous key for the genus *Orthotrichum* in Europe, the Mediterranean basin and Macaronesia, with the aim of providing an easy identification tool that includes all the novelties, useful throughout this vast territory.

To make the identification easier, the new key has been organized into groups of species that share morphologically distinctive and taxonomically significant characters. It is an artificial grouping that does not pretend to reflect the phylogenetic relationships among taxa. Thus, for instance, all the species of Group II possess immersed stomata and are related to those of Group VII, but they have been preferably separated since they can be well discriminated by means of their gametophyte characters, and their separation makes the key easier to use. It is possible that a partial coincidence may eventually be found between the groups established here and the subgenera defined in *Orthotrichum* by Lewinsky (1993). The nomenclature follows Hill *et al.* (2006), with the exception of subgenus *Orthophyllum* Delogne, for which we follow the criteria of Goffinet *et al.* (2004) who treat it as genus *Nyholmiella* Holmen & Warncke *in* Damsholt *et al.* For bryological terms Magill (1990) has been followed. Descriptions and illustrations of the species can be found in Lewinsky-Haapasaari (1995, 1998) and, for recently described species, in the corresponding publications.

## KEY TO THE EUROPEAN AND MEDITERRANEAN SPECIES OF ORTHOTRICHUM S. L.

| 1.  | Upper leaves with margins incurved or plane, sometimes slightly recurved in the middle or inferior part or only on one leaf side GROUP I            |
|-----|---|
| 1'. | Upper leaves with both margins recurved in the greater part of their length   |
|     |   |
| 2.  | Leaves with the apex differentiated into a hyaline acumen or hair point, or broadly obtuse or rounded (sometimes additionally mucronate or dentate) |
|     | GROUP II  |
| 2'. | Leaf apices not differentiated in this way, acuminate, acute or narrowly obtuse   |
|     | 3   |
| 3.  | Stomata phaneropore (superficial)   |
| 3'. | Stomata cryptopore (immersed) 5   |
|     |   |

| 2'.       | Hyaline acumen short (less than 0.4 mm), sometimes little visible; leaf cells not bulging and more or less thick-walled; exostome with 8 pairs of orange teeth that in old capsules can split partially and become irregularly recurved; capsules orange with well marked and prominent ribs   |
|-----------|--|
|           | Leaves broadly lanceolate, at least some apices clearly dentate; plants robust, larger than 1 cm, growing on tree bases, roots and rocks subject to periodic floods  |
|           | Upper leaf cells 16-24 $\mu$ m in diameter, smooth or almost so, often bulging on both sides; some leaf apices clearly mucronate due to 1(2) protruding cells; mosses growing on substrata subject to periodic floods  |
|           | Leaves oblong or oblong-lanceolate, clearly concave; mosses having a compact habit, especially when young  |
| 6<br>6'   | Endostome segments densely papillose; capsules not or scarcely constricted below mouth when dry, exothecium pale yellowish with orange ribs; capsule mouth star-shaped when dry (zenithal view)  |
|           | OUP III – Leaves with both margins recurved; apices acuminate, acute narrowly obtuse. Stomata phaneropore; capsules exserted.  |
| 1.        | Peristome almost lacking (only some basal exostomial cells present); capsule mouth puckered when dry, constricted by short brown or blackish ribs  |
| 1'.       | Peristome well developed, capsules with mouth open when dry, exothecium smooth or with ribs not closing the mouth when dry   |
|           | Exostome teeth erect or patent when dry; endostome segments rudimentary or absent in capsules just after dehiscence  |
| 3.<br>3'. | Endostome segments broad (each as wide as a tooth of each exostome pair), oblong and with the margins sinuous or irregular; capsules smooth or with fine ribs, narrowly cylindrical or long fusiform when dry <i>O. vladikavkanum</i> Endostome segments slender, linear and with entire margins; capsules ribbed, although sometimes shortly so, cylindrical when dry, sometimes shortly so 4 |

| 6.  | Exostome teeth pairs splitting after the detachment of the lid, recurved and irregularly twisted and sometimes overlapping when dry (fragile and most frequently broken in old capsules); cell portions of exostome teeth ornamented by radial lines; capsule mouth star-shaped when dry (zenithal view); lid usually plane at base |
|---|---|
| 6'.   | Exostome teeth in 8 persistent pairs, if tending to split, then teeth not twisted irregularly when dry; exostome papillose or with irregular lines, rarely with radial lines; capsule mouth ring-shaped when dry; lid usually convex at base 7  |
| 7.  | Calyptrae densely hairy; capsules long cylindrical, not or scarcely constricted below mouth when dry; exostome teeth revolute when dry, touching the capsule only by the tips   |
| 7'.   | Calyptrae sparsely hairy; capsules ± oblong or shortly cylindrical, usually constricted below mouth when dry; exostome teeth recurved and usually appressed against the urn when dry9   |
| 8.  | Capsules semi-emergent, with the ribs well marked along the whole urn length; seta shorter than capsule; mature calyptrae oblong-conic, with green-yellowish hairs; forming compact cushions in Mediterranean thermophilic woods  |
| 8'.   | Capsules fully emergent, usually with ribs marked only in the upper urn half; seta equal to or longer than capsule; mature calyptrae conic or fusiform, with golden or discoloured hairs; generally forming loose cushions in Eurosiberian or Mediterranean mountainous woods O. speciosum var. speciosum                           |
| 9.  | Capsules sulcate in the upper half, short or long cylindrical, with the neck as long as the urn and longitudinally plicate when dry; endostome segments short and deciduous   |
| 9'.   | Capsules strongly sulcate along the urn whole length, oblong or shortly cylindrical, with the neck shorter than the urn and usually not plicate when dry; endostome segments long and persistent  |
| 10.   | Exostome teeth fenestrate at the apex, often also partially perforate along the median line, with the apical third differentially ornamented (more openly papillose and with scattered lines); endostome segments smooth or slightly reticulate-papillose   |
| 10'.  | Exostome teeth entire, often with a cancellate aspect due to apical thickenings, but not or very rarely lacunose, without perforations in the median tooth line, nor differential ornamentation in the apical third; endostome segments clearly ornamented by thick lines and/or papillae   |
| GROUP V – Leaves with both margins recurved, apices acuminate, acute or narrowly obtuse. Stomata cryptopore; capsules exserted. |   |
| 1.  | Exostome teeth recurved (touching the urn) when dry, leaves flexuose, sometimes moderately contorted when dry, epiphytic mosses   |
| 1'.   | Exostome teeth erect or patent when dry; leaves erect, not contorted when dry; saxicolous or more rarely epiphytic mosses   |

|                                 | Peristome pale yellow; exothecial bands 4-5 cells wide; stomata confined to the inferior capsule half; calyptrae usually covering entirely the capsule, oblongconic, yellowish and clearly plicate   |
|---------------------------------|--|
|                                 | the upper capsule half; calyptrae not covering the capsule base, campanulate, smooth or hardly plicate and frequently with brown longitudinal stripes  |
| 2                               |  |
| 3.                              | Capsules orange, oblong-cylindrical or cylindrical, not or scarcely constricted below mouth when dry, usually long exserted; mosses growing on dry calcareous rocks, and less frequently on siliceous rocks or as an epiphyte  |
| 3'.                             | Capsules brown, oblong or ovate-oblong, clearly constricted below mouth when dry, hardly exserted; mosses growing only on rocks in arctic zones, or on river and stream banks  |
| 4.                              | Leaves oblong-ligulate, generally partially bistratose in the upper part, often with a glaucous appearance due to the presence of abundant and branched tall papillae; capsules usually 8-striate, endostome lacking or formed by rudimentary segments; vaginula with few, sparsely papillose hairs; mosses from arctic environments |
| 4'.                             | Leaves oval-lanceolate to oblong-lanceolate, unistratose, greenish, not glaucous; capsules usually conspicuously 16-striate; endostome with segments well developed and usually coloured; vaginula naked; mosses growing in  |
|                                 | riparian environments from temperate areas O. cupulatum var. riparium  |
| or                              | OUP VI – Leaves with both margins recurved, apices acuminate, acute narrowly obtuse. Stomata cryptopore; capsules immersed or emergent. ostome teeth erect or patent when dry.   |
| or<br>Ex                        | OUP VI – Leaves with both margins recurved, apices acuminate, acute narrowly obtuse. Stomata cryptopore; capsules immersed or emergent. ostome teeth erect or patent when dry.   |
| or<br>Ex<br>1.                  | OUP VI – Leaves with both margins recurved, apices acuminate, acute narrowly obtuse. Stomata cryptopore; capsules immersed or emergent.  |
| or<br>Ex<br>1.                  | COUP VI – Leaves with both margins recurved, apices acuminate, acute narrowly obtuse. Stomata cryptopore; capsules immersed or emergent. Ostome teeth erect or patent when dry.  Leaves totally or partially bistratose in the upper third   |
| or<br>Ex<br>1.<br>1'.           | OUP VI – Leaves with both margins recurved, apices acuminate, acute narrowly obtuse. Stomata cryptopore; capsules immersed or emergent. Ostome teeth erect or patent when dry.  Leaves totally or partially bistratose in the upper third  |
| or Ex<br>1.<br>1'.<br>2.<br>2'. | Leaves totally or partially bistratose in the upper third  |
| or Ex<br>1.<br>1'.<br>2.<br>2'. | Leaves oblong-ligulate with obtuse apex, often very papillose; capsules broadly emergent, usually 8-ribbed; exostome teeth with abundant thick papillae; vaginula with some papillose hairs; gametophytes dull green; mosses growing in arctic environments  |

| 5.  | Leaves oblong-ligulate, glaucous due to tall and branched papillae; capsules usually 8-ribbed; vaginula hairy; mosses growing in arctic environments  |
|-----|---|
| 5'. | Leaves lanceolate to oblong-lanceolate, greenish or rarely glaucous due to presence of papillae; capsules usually 16-ribbed; vaginula naked; mosses growing in various environments   |
| 6.  | Calyptrae naked or almost so; endostome segments well developed and coloured; capsules broadly emergent   |
| 6'. | Calyptrae more or less hairy; segments lacking or short and hyaline; capsules immersed or variously emergent  |
| 7.  | Capsules small and rounded; exostome teeth densely covered by thick papillae  |
| 7'. | Capsules large, ovate or pyriform; exostome teeth striate or papillose-striate  |
| or  | ROUP VII - Leaves with both margins recurved, apices acuminate, acute narrowly obtuse. Stomata cryptopore; capsules immersed or emergent; ostome teeth recurved when dry.   |
| 1.  | Endostome wheel-shaped, with broad segments fused in the upper third forming an annular structure   |
| 1'. | Endostome segments linear, free in the upper third (sometimes irregularly connected by thin transverse appendices)  |
| 2.  | Mosses hydrophilic, growing on substrata periodically flooded; leaves broadly lanceolate, with the apex blunt and dentate; plants robust, 1-2 cm tall   |
| 2'. | Mosses xerophytic, mostly growing in dry environments; leaves narrowly lanceolate or with ovate base and the rest of lamina ligulate, and the apex acute or obtuse, rarely with some lateral teeth; plants in general less than 1 cm tall (except <i>O. handiense</i> ) |
| 3.  | Exothecial bands 2(3) cells wide; capsules not or scarcely constricted below mouth when dry and empty   |
| 3'. | Exothecial bands 4 or more cells wide; capsules more or less constricted below mouth when dry and empty   |
| 4.  | Pairs of exostome teeth easily splitting each into two when recurved endostome of 16 segments (sometimes the intermediate reduced), often appendiculate; capsules pale-yellow; vaginula naked; some leaves with apex sinuate, dentate or channeled                      |
| 4'. | Pairs of exostome teeth remaining fused when recurved; endostome of 8 non-appendiculate segments; capsules brown-orange, rarely pale brown; vaginula generally with some long hairs; leaf apex acute, with margin entire <i>O. patens</i>                               |

|     | Endostome with at least some segments completely erect when dry, slightly ornamented by striae at base; plants with dimorphic branches; leaves of female branches with broadly oval base and lamina ligulate, with margins recurved for the greater part of their length; leaves of male branches smaller, with the base little widened, and margins plane or little recurved in the middle; capsule neck very long |
|-----|---|
| 6.  | Stomata confined to the middle and upper capsule half, if all in the middle, then some almost uncovered to half covered by slightly thick-walled exothecial cells   |
| 6'. | Stomata mostly in the lower capsule half, if all in the middle, then broadly covered by strongly thick-walled, often prominent, exothecial cells 12   |
|     | Exostome teeth pairs early splitting after the fall of the lid, irregularly recurved when dry; endostome of 16 strongly papillose segments. Leaves lanceolate, not differentiated at the apex; capsules yellowish, broadly emergent and strongly constricted below mouth when dry; lower stomata usually broadly covered by exothecial cells  |
|     | At least some leaves sharply narrowed into a short and acute acumen consisting of green, not differentiated cells; calyptrae with a few thick and papillose hairs; endostome segments yellowish or orange   |
| 9.  | Upper leaves mostly with oval base and linear or ligulate lamina; endostome usually of 16 segments, the intermediate often shorter, even vestigial; all stomata scarcely covered by exothecial cells  |
| 9'. | Upper leaves lanceolate or oblong-lanceolate, sometimes almost elliptic and sharply narrowed in the upper part into a short ligulate lamina; endostome of 8 segments; stomata little to half covered by exothecial cells  |
| 10. | Endostome of 16 segments of equal length, linear and strongly incurved when dry; exostome teeth ornamented in the lower half by a thin reticulum, from which some papillae hardly protrude; capsule base ventricose, sharply contracted into seta; leaf apex concave-carinate, often cucullate when dry   |
| 10' | Endostome of 8 long main segments and 8 intermediate clearly shorter and less incurved, sometimes rudimentary segments; exostome teeth ornamented in the lower half by thick, somewhat prominent and dense papillae; capsule gradually contracted into seta; leaf apex plane, not cucullate when dry <i>O. pallens</i>  |
| 11. | Capsule ovoid or pyriform when moist, sharply contracted into seta; segments broad at base, 1/2 to 3/4 as long as the exostome teeth; stomata scarcely covered by exothecial cells  |

| 11'. | Capsule oblong-cylindrical when moist, gradually contracted into seta segments linear, almost as long as the exostome teeth; at least some stomata half-covered  |
|------|--|
| 12.  | Capsules with ribs marked only in the upper half; exostome teeth fused in pairs only at base and irregularly recurved when dry; lid conic-mammillate endostome clearly papillose; mosses robust, 1-2 cm tall, Canarian endemic   |
| 12'. | Capsules with ribs well marked in their whole length; exostome teeth pairs remaining intact and regularly recurved when dry; lid rostrate, plane or convex at base; endostome smooth or ornamented by scarcely visible lines or papillae mosses smaller and slender; in general less than 1 cm tall, widely distributed                      |
| 13.  | Some leaves with the apex narrowed into a channelled apiculus formed by the involute margins or with only one margin erect-incurved, the other leaves obtuse or dentate; vaginula naked; propagules frequent on old leaves calyptrae with papillose hairs concentrated in the apical zone <i>O. tenellum</i>                                 |
| 13'. | Leaves acute, the apex not differentiated in this way; vaginula hairy or naked propagules infrequent; calyptrae naked or with papillose hairs scattered throughout their surface, rarely concentrated in the apical zone   |
| 14.  | Exostome teeth with dense papillae in the lower part and the upper part striate-papillose, less densely ornamented; endostome segments frequently with transverse thickenings; leaf papillae usually tall and frequently branched calyptrae with thick and papillose hairs, in general also strongly papillose on the plicae                 |
| 14'. | Exostome teeth uniformly papillose, ornamentation of the upper part not contrasting with that of the lower part; endostome segments rarely with transverse thickenings; leaves variously papillose; calyptrae smooth or very slightly papillose, naked or with thin and scarcely papillose hairs   |
| 15.  | Vaginula with long and papillose hairs; calyptrae hairy, capsule neck long defluent  |
| 15'. | Vaginula without long and papillose hairs, naked or with abundant, short and smooth hairs; calyptrae naked or with a few short and scattered hairs; capsule neck short, not exceeding 1/3 of the urn length  |
| 16.  | Vaginula usually with abundant short and smooth hairs; mature capsules with exothecial bands brown-reddish in the upper third, conspicuously contrasting with the rest of exothecium; stomata usually covered by broadly prominent exothecial cells; upper leaves lanceolate   |
| 16'. | Vaginula naked; mature capsules with brown exothecial bands whose colour does not contrast with the rest of exothecium; stomata usually surrounded by scarcely prominent exothecial cells; upper leaves oblong-lanceolate or broadly lanceolate, sometimes almost elliptic with the upper part sharply narrowed into a short ligulate lamina |

#### Taxonomical note

Orthotrichum leblebicii Erdağ, Kürschner & Parolly was recently described from material from Southern Turkey (Erdağ et al., 2004), and characterized as a moss having leaves similar to those of O. diaphanum Schrad. ex Brid. and Orthotrichum vittii F. Lara, Garilleti et Mazimpaka, but with superficial stomata. Re-examination of the type material of Orthotrichum leblebicii (AYDN 1141!) has shown that it actually coincides with O. vittii in all its characters. As for the stomata, they are sometimes apparently superficial in the Turkish material, but the degree of cover in O. vittii varies from the typically immersed form to stomata so little covered that they may appear superficial. Therefore a synonymization of *Orthotrichum leblebicii* with *O. vittii* is here proposed.

Orthotrichum vittii F. Lara, Garilleti et Mazimpaka in Lara et al., The bryologist 102: 53. f. 1-22. 1999.

Orthotrichum leblebicii Erdağ, Kürschner et Parolly, Nova Hedwigia 78. f. 1-2: 518. 2004, syn. nov.

#### ALPHABETIC LIST OF THE TAXA INCLUDED IN THE KEY

#### Genus Orthotrichum Hedw.

- O. acuminatum H. Philib.
- O. affine Schrad. ex Brid.
- O. alpestre Bruch et Schimp.
- O. anomalum Hedw.
- O. callistomum Fisch.-Oost. ex Bruch et Schimp.
- O. casasianum F. Lara, Garilleti et Mazimpaka
- O. consimile Mitt.
- O. consobrinum Cardot
- O. crenulatum Mitt.
- O. cupulatum Hoffm. ex Brid.
  - var. bistratosum Schiffn.
  - var. *fuscum* (Venturi) Boulay
  - var. riparium Huebener
- O. diaphanum Schrad. ex Brid.
- O. gymnostomum Bruch ex Brid. (vide sub Nyholmyella)
- O. handiense F. Lara, Garilleti et Mazimpaka
- O. hispanicum F. Lara, Garilleti et Mazimpaka
- O. ibericum F. Lara et Mazimpaka
- O. laevigatum J.E. Zetterst.
- **O.** *lyellii* Hook. *et* Taylor
- O. macrocephalum F. Lara, Garilleti et Mazimpaka
- O. microcarpum De Not.
- O. obtusifolium Brid. (vide sub Nyholmyella)
- O. pallens Bruch ex Brid.
- O. patens Bruch ex Brid.
- O. pellucidum Lindb.
- O. philibertii Venturi

- O. pulchellum Brunt.
- O. pumilum Sw. ex anon.
- O. pvlaisii Brid.
- O. rivulare Turner
- O. rogeri Brid.
- O. rupestre Schleich. ex Schwägr.
- O. scanicum Grönvall
- O. schimperi Hammar
- O. shawii Wilson
- O. sordidum Sull. et Lesq.
- O. speciosum Nees

var. brevisetum F. Lara, Garilleti et Mazimpaka

- O. sprucei Mont.
- O. stellatum Brid.
- O. stramineum Hornsch. ex Brid.
- O. striatum Hedw.
- O. tenellum Bruch ex Brid.
- O. tortidontium F. Lara, Garilleti et Mazimpaka
- O. urnaceum Müll. Hal.
- O. urnigerum Myrin
- O. vittii F. Lara, Garilleti et Mazimpaka
- O. vladikavkanum Venturi

### Genus Nyholmiella Holmen & Warncke

N. gymnostoma (Bruch ex Brid.) Holmen et Warncke

N. obtusifolia (Brid.) Holmen et Warncke

Acknowledgements. We thank the comments of Tom Blockeel and Jan-Peter Frahm on a previous draft. This work was funded by the Spanish Ministerio de Educación y Ciencia, grants nº CGL2004-03513 and CGL2007-61389.

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