# Opinion

# CellPress

# Austral birds offer insightful complementary models in ecology and evolution

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The Southern Hemisphere differs from the Northern Hemisphere in many aspects. However, most ecological and evolutionary research is conducted in the Northern Hemisphere and its conclusions are extrapolated to the entire globe. Therefore, unique organismal and evolutionary characteristics of the south are overlooked. We use ornithology to show the importance of including a southern perspective. We present examples of plumage pigmentation, broodparasitic nestling ejection, flightlessness, female song, and female aggression modulated by progesterone as complementary models for investigating fundamental biological questions. More research in the Southern Hemisphere, together with increased cooperation among researchers across the hemispheres and within the Southern Hemisphere, will provide a greater global outlook into ecology and evolution.

#### Differences between the hemispheres

Only about one-fifth of the Southern Hemisphere is covered by land compared with twice as much in the Northern Hemisphere. Yet, the Southern Hemisphere supports a disproportionately rich biodiversity [1]. Nevertheless, a recent study revealed that the number of papers published in ecology during 1996-2019 was disproportionally skewed to institutions of the Northern Hemisphere [2]. This bias was not explained by economic variables and the possibly complex factors underlying the pattern remain unclear [2]. To detect potentially recent changes in this trend, we conducted a similar analysis but focused on the study area instead of the institution. The great majority of primary research papers published in 2021 in ecology and evolutionary biology were based on research carried out in the Northern Hemisphere (Figure 1). This bias exists across all taxonomic groups considered. Despite this, conclusions have often been extrapolated to the Southern Hemisphere, even though ecological and evolutionary processes do not necessarily operate similarly in both hemispheres. This paucity of studies conducted in the Southern Hemisphere has led to biased interpretations in the past, as we detail later, and hinders our understanding of global or latitudinal patterns of biodiversity [3,4]. Furthermore, it poses problems for conservation, as an under-representation of Southern Hemisphere threatened species hinders the effectiveness of management actions [5].

The uniqueness of the Southern Hemisphere is, in part, due to its geological history. The break up of the Gondwana supercontinent about 180-160 million years ago [6] deeply influenced the biogeography and evolutionary pathways of the organisms that originated and diversified in the area. A huge number of oceanic islands formed in the Southern Hemisphere and offered opportunities for taxonomic and ecological diversification. New insights into the biology of southern

#### Highlights

In ecological studies sampling must be stratified to ensure a sample population that best represents the entire population studied.

Meta-analyses assessing global patterns should also use a stratified data structure to ensure unbiased results.

We show that this is generally not the case, as individual studies are heavily biased toward the Northern Hemisphere.

We also show that Southern Hemisphere birds offer insightful complementary models for ecological and evolutionary biology.

We therefore point to the need for promoting research in the Southern Hemisphere to tackle fundamental questions with a global perspective.

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# **Trends in Ecology & Evolution**

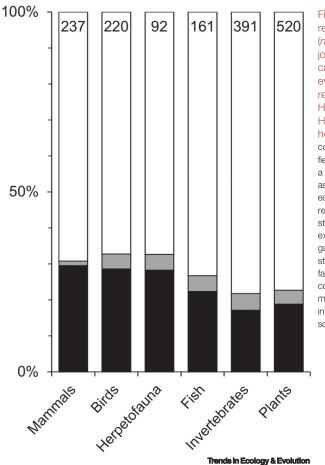


Figure 1. Proportion of primary research papers published in 2021 (n = 1495) in high impact-factor (>5) journals in the Web of Sciences categories for ecology and evolutionary biology that include research conducted in the Northern Hemisphere (white area), Southern Hemisphere (black area), or across hemispheres (gray area). We considered only research articles with fieldwork conducted in field sites allowing a clear assignment to hemispheres (we assigned studies with single sites near the equator either to the N or S) and excluded reviews, meta-analyses, and microbial studies, as well as studies conducted exclusively in laboratories, zoos, or gardens. To qualify as cross-hemisphere study, at least one study site had to fall entirely within each hemisphere. We counted each paper only once for the most relevant organism group. Numbers in bars are the sample size (i.e., number of scientific papers) for each group.

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organisms, particularly birds, improved previous perspectives based on generalizing findings from the Northern Hemisphere. Unique evolutionary processes occur in parrots, flightless birds, and some passerines. Moreover, avian life history traits are not equally distributed between the two hemispheres, resulting in different evolutionary processes. For example, the vast majority of birds studied in the Northern Hemisphere are biparental whereas there are proportionally more cooperative breeders in the Southern Hemisphere [7]. Similarly, adult survival in birds increases more strongly with latitude in the Southern than in the Northern Hemisphere [8]. We present several ornithological examples to show that birds from the Southern Hemisphere offer novel and complementary models to achieve a more global outlook on ecology and evolution.

#### Evolution – plumage pigmentation

Animal coloration plays a key role in understanding animal evolution, particularly with respect to sexual selection. Studies on avian plumage coloration are classic models for investigating the information content and honesty of biological signals in the context of sexual selection [9]. Plumage coloration is mainly produced by melanins, carotenoids, and porphyrins [10], widely present in Northern Hemisphere birds. Melanins correlate with individual hormonal state [11] and with a suite of traits leading to behavioral syndromes [12], while carotenoids usually signal nutritional or health state to prospective mates [9]. This led to the view that carotenoid-based colors are reliable signals of quality in birds, and to a widespread use of this model for research



on sexual selection and mate choice [13]. However, numerous southern birds use completely different pigments, such as turacin, turacoverdin, spheniscin, vitamin A, or psittacofulvins to color their plumage [9]. The levels of psittacofulvins in burrowing parrots *Cyanoliseus patagonus* (Figure 2A) correlate with body mass, body size, body condition, sexual ornament size, sexual dichromatism, as well as parental investment, breeding success, and nestling growth [14]. Psittacofulvins are thus condition dependent and involved in a trade-off between ornamentation and immune function [14]. Since psittacofulvines might be costly to produce [15], they could also act as an honest signal of individual quality. However, contrary to carotenoids, psittacofulvines are endogenously synthesized and do not signal nutritional state or foraging ability. As different mechanisms should link psittacofulvines and individual condition, they provide a complementary model to investigate honest signaling in sexual selection and mate choice. These mechanisms and the possible costs of psittacofulvine production remain to be identified and quantified, opening possibilities for a novel research framework (see Outstanding questions).

#### Evolution – brood parasitism

Decades of research on the coevolutionary arms race between brood parasites and their hosts have shown that the egg stage has a central role in well-studied systems from both the Northern and Southern Hemispheres [16,17]. This seemed to confirm earlier theoretical considerations postulating that the arms race at the nestling stage was unlikely to evolve because it should be maladaptive for the host [18]. However, host species belonging to the genus Gerygone in the Australasian region recognize and eject brood-parasitic Chalcites bronze-cuckoo chicks from their nests [19,20] (Figure 2B,C). Gerygones recognize the parasite nestling via acoustic and visual cues and without directly comparing it with their own chicks [21,22], which differs from other known forms of nestling rejection [23]. Furthermore, nestlings of both bronze-cuckoos and gerygones present skin polymorphism [22,24]. To date, nestling ejection in the Northern Hemisphere has been found in only two unrelated bird species, which are not successfully parasitized [25,26]. Although these examples might offer a glimpse into one of the possible outcomes of the arms race (i.e., host beats parasite), they cannot contribute additional insights into the actual coevolutionary process. By contrast, the Australasian Chalcites-Gerygone systems offer unique opportunities for the study of coevolution at the nestling stage, and the life-history consequences of nestling polymorphism. First, they show that the arms race at the nestling stage can lead to different evolutionary outcomes (nestling polymorphism), which challenges our current theories and broadens our understanding of coevolutionary pathways. Second, gerygones have a wide geographic distribution are parasitized by multiple bronze-cuckoo species [27], and phylogenetic analyses suggest that nestling ejection is an ancestral trait in this group [28]. This offers a unique opportunity to study a completely different pathway of the coevolutionary arms race.

#### Evolution and ecology - flightlessness and social systems

Flightless birds were once found worldwide, but with the exception of a flightless rail in the Philippines, all species in the Northern Hemisphere went extinct (e.g., the great auk *Pinguinus impennis*). The approximately 60 extant flightless bird species live, except the one mentioned previously, exclusively or mainly in the Southern Hemisphere. The loss of flight happened independently in seven taxonomic groups [29], opening new evolutionary pathways with novel behavioral and anatomical traits. The terrestrial lifestyle of flightless birds led to competition with mammals or large reptiles and promoted the evolution of gigantism, for example, in ostriches, emus, and moa, or restricted them to islands with no terrestrial mammals. Penguins (Sphenisciformes), which represent about one-third of flightless bird species, provide ideal models for investigating macroevolutionary hypotheses. Penguin wings evolved into flippers, analogous to hind flippers in seals. They have also evolved a counter-current heat exchange



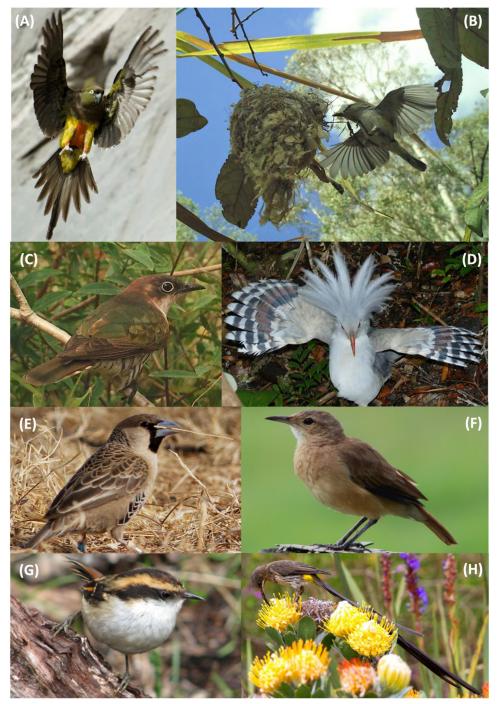


Figure 2. Examples of Austral birds that offer complementary biological models to study fundamental questions in ecology and evolution. (A) Burrowing parrot *Cyanoliseus patagonus* showing its psittacofulvin-based abdominal feather patch, a signal of individual quality correlated to breeding success, nestling growth, and environmental conditions [14] (photograph: Bill Conway, deceased), (B) fan-tailed gerygone *Gerygone flavolateralis* arriving at its domeshaped nest [20,22] (photograph: Alfredo Attisano), (C) shining bronze-cuckoo *Chalcites lucidus*, brood parasite of the

(Figure legend continued at the bottom of the next page.)



system like that of marine mammals [30]. Flightless birds, like terrestrial mammals, are confined to a mainly 2D space, meaning that they have limited dispersal ability or that they cannot easily escape predators. Therefore, flightlessness has important behavioral consequences. For example, most penguins breed and spend most of their terrestrial lives in large colonies, which led to the evolution of social interactions including advanced systems of nestling recognition by smell and voice [31]. The kagu *Rhynochetos jubatus* of New Caledonia (Figure 2D) developed a primate-like social system, with multigeneration clans of families maintained by strong social bonds [32]. Therefore, to understand how locomotion contributes to influence social systems, further studies on flightless birds are needed, and nowadays are only possible in the Southern Hemisphere.

#### **Bioacoustics – bird song**

Bird song has generally been defined using passerine birds in northern temperate regions (with the exception of captive zebra finches *Taeniopygia guttata* from Australia): vocalizations by male birds, which serve to advertise their presence to females, and defend territory from rival males. However, this definition is inadequate for the diversity of bird song on a global scale [33]. Song by female birds has received more attention in recent years [34,35]. Plotting the occurrence of female song against phylogeny suggested that female song is ancestral in passerine birds and has been secondarily lost in some lineages [36]. For example, female red-winged starlings Onychognathus morio in South Africa sing regularly throughout the breeding season while male song declines [37], whereas in the New Zealand bellbird/korimako Anthornis melanura female singing bouts increase as male song decreases [38]. Female Australian magpies Gymnorhina tibicen also sing more frequently than males [39]. Such findings have led to a reexamination of assumptions about sexual selection and sexual dimorphism in birds [40,41] and show how historic and geographical research biases have led to a neglect of female song [34]. Austral birds offer a special opportunity for comparative studies of key questions: How does song acquisition differ in male and female birds? What message does song convey to the other sex? The African Vidua species, which are brood parasites that learn the song of their hosts and later use this as a signal to conspecifics [42], could guide new investigations of other Southern Hemisphere species. Another promising line of research is offered by suboscine birds, which mainly live in the Southern Hemisphere. Recent research showed that some suboscine birds, previously thought not to learn their songs, are capable of vocal learning [43,44]. Thus, the Southern Hemisphere offers the possibility to consider 'song' beyond the 'songbirds' and to reexamine what we know about song learning.

#### Physiology - physiological mechanisms underlying behavior

Physiological traits integrate environmental and genomic information to mediate phenotypic responses [45]. These responses can have direct fitness consequences for the organisms and may potentially shape evolutionary processes [46]. However, although there have been major advances in this area, there are still open questions. One of the most fundamental gaps in our understanding of the physiological mechanisms underlying behaviors relates to the fact that almost all of our knowledge comes from studies done in the Northern Hemisphere [47]. As physiological traits are tightly responsive to environmental conditions, Austral species give us the

fan-tailed gerygone [19,22] (photograph: Alfredo Attisano), (D) kagu *Rhynochetos jubatus* displaying to defend the cooperative family's chick [32] (photograph: Jörn Theuerkauf), (E) sociable weaver *Philetarius socius* collecting material to build a communal nest [50] (photograph: Pietro B. D'Amelio), (F) rufous hornero *Furnarius rufus*, a species in which the ratio between testosterone and progesterone appears to be related to territorial defense [48] (photograph: Natalia Allenspach), (G) thorn-tailed rayadito *Aphrastura spinicauda*, a species whose adrenocortical stress response (related to survival) does not vary among populations along a latitudinal gradient [65,66] (photograph: Rodrigo A. Vásquez), (H) Cape sugarbird *Promerops cafer*, a pollinator responsible for one of the weirdest mutualism–commensalism–parasitism relationships described [55,56] (photograph: Pietro B. D'Amelio).



opportunity to advance our knowledge by providing unexplored environments and novel adaptations. For example, Neotropical birds (e.g., Furnariidae: Figure 2F,G), with different evolutionary origins and life histories from species in the Northern Hemisphere, are useful to understand how environmental cues affect breeding and its related physiological and behavioral traits. Northern Hemisphere research suggests testosterone plays a central role in male aggression. However, in rufous hornero Furnarius rufus, the ratio between testosterone and progesterone, and not testosterone itself, seems to be related to territorial defense [48]. The diverse breeding systems of Southern Hemisphere birds could increase our knowledge on physiological mechanisms underlying behavior. For example, in the black coucal Centropus grillii, a polyandrous bird with reversed sex roles, aggression in females is modulated by progesterone instead of testosterone that has been classically associated with this behavior [49]. Alternatively, in sociable weavers Philetarius socius (Figure 2E), which cooperate to raise offspring and build their nest structures, females 'pay the oxidative cost of dominance' [50], providing an opportunity to better understand how physiological mechanisms contribute to shaping cooperative behaviors and its variability [51]. Hence, research on Southern Hemisphere species offers novel physiological models to better understand how variable or flexible the physiological mechanisms underlying behavior are.

#### **Concluding remarks**

Research in the Southern Hemisphere opens pathways to test a broad spectrum of novel hypotheses (see Outstanding questions). To show this, we presented examples from recent avian research. However, this could also be illustrated with other taxonomic groups. Australian reptiles are excellent model species for answering fundamental research questions in areas such as sexual selection, mating, cryptic female choice, sociality, reproductive effort, and signaling among many others [52]. Southern Hemisphere fish species have higher immunoreactivity than Northern Hemisphere fish [53], and Australasian plants show some form of eusociality [54] unknown from plants in the Northern Hemisphere. Moreover, the Southern Hemisphere hosts many unique ecosystems, such as islands or the South African Fynbos (Box 1), which further open new research possibilities.

There are many possible reasons why research in the Southern Hemisphere often produces results different from those of that done in the Northern Hemisphere as we demonstrated earlier.

#### Box 1. Unique biomes and biological interactions

South Africa is home to a unique biome, the richest and smallest of the world's six floral kingdoms: the Fynbos. Part of the Cape Floristic region hotspot, the region boasts 9000 plant species in a region the size of Portugal, most of which are endemic. Although not considered to be diverse in terms of avifauna, the region is home to most of South Africa's endemic bird species, including eight biome endemics. Two nectar-feeding species are disproportionally significant as pollinators: as many as a quarter of Protea and Erica species are pollinated by the nectivorous orange-breasted sunbird Anthobaphes violacea and Cape sugarbird Promerops cafer (Figure 2H) [55]. Within this biome, there are also unusual mutualisms. In one of these, the Cape sugarbird is host to the mite Proctolaelaps vandenbergi (which is a pollen predator), which in turn is host to another mite Glycyphagus sp., which is host to a Sporothrix fungus, the dispersal for all of which depend on the bird responsible for pollination [56]. The Proctolaelaps mite consumes significant amounts of pollen: so, the sugarbird is responsible for transporting a micro-ecosystem, pollination, and spread of a Protea pollen parasite. This example is unique and, thus, offers an alternative model to advance our understanding of mutualism-commensalism-parasitism relationships. It could also be used to investigate how trophic complexity influences the persistence of mutualism, an open 'big question' in ecological research [57]. In addition to birds, there are other unusual examples of coevolution from the Cape region. The seeds of Ceratocaryum argenteum (Restionaceae), for example, mimic the odor of herbivore dung to attract dung beetles [58]. Since the seeds are hard and the dung beetles cannot eat them, they transport and bury the seeds facilitating dispersal, which is an outstanding case of deception in plant seed dispersal. Recently, an unambiguous case of sexual deception of a beetle was recorded for this biome: male longhorn beetles (Chorothyse hessei, Cerambycidae) pollinate the flowers of a rare southern African orchid (Disa forficaria) [59]. A novel macrolide emitted by the flower strongly attracts the beetles, demonstrating a new biological function for plant macrolides as well as confirming that beetles can be exploited through sexual deception to serve as pollinators. Altogether, these examples from the Fynbos reveal some of the many distinctive ecological interactions found in the Southern Hemisphere that offer unconventional models in unique ecosystems for research into ecology and evolution.

#### Outstanding questions

Does a trade-off with the immune system explain the condition dependence of psittacofulvins, turacin, turacoverdin, or spheniscin? How is the honesty of these signals in sexual selection maintained, and what are the physiological mechanisms?

Which factors promoted the parasitehost arms race at a nestling stage in the Southern Hemisphere?

Does flightlessness open evolutionary pathways to complex social systems?

How does song acquisition differ in male and female birds and which message does song convey to the other sex?

Are the relationships between physiology, behavioral phenotypes, and fitness in the Southern Hemisphere different from the Northern Hemisphere and how are the behavioral traits hormonally regulated?



#### Box 2. Possible social solutions to overcome the hemisphere bias

Present telecommunication means and social media give the opportunity to facilitate and coordinate research across distant regions, as shown by initiatives like the Parrot Researchers Group<sup>1</sup> (PRG) or the recently established Working Group Gondwanan Ornithology of the International Ornithologists' Union<sup>ii</sup>, which initiated this opinion article. Such enterprises help tackle research questions through cross-hemisphere cooperation [62,63] and could greatly increase our knowledge of the unique biological processes occurring in the Southern Hemisphere. For instance, joint research carried out by the PRG allowed to gather up-to-date information on threats affecting 192 populations of 96 Neotropical parrot species across 21 countries, to identify gaps of data for several other countries in the region, and to suggest priorities for conservation [60]. International journals can also help promote research from the Southern Hemisphere through effective measures such as: (i) an open recruitment call for Associate Editors, which facilitates an increase in geographic representation and consequently a diversification of the reviewers, (ii) making subscriptions affordable, even for low-income countries, (iii) taking part in existing programs that provide institutions in lower-income countries with online access to academic content, and (iv) reducing the time to which content becomes free to read [64]. Finally, research funding schemes should also promote a global understanding of ecology and evolution. The Southern Hemisphere funding schemes should prioritize and allocate more resources to within-hemisphere cooperation projects and to the exchange of scientists among its different regions. The Northern Hemisphere funding agencies should also facilitate, even prioritize and fund, research projects conducted in cooperation with scientists of the Southern Hemisphere. This will help to alleviate the lack of funding and infrastructure, often due to co-Ionial legacies that contributed to the hemisphere research bias.

One aspect might be the breakup of Gondwana, which lead to many separated islands in the Southern Hemisphere. By contrast, the Northern Hemisphere has been interconnected most of the time. While we cannot conclusively determine why the differences exist, we argue that limiting research mainly to the Northern Hemisphere will limit our ability to discover general biological principles. In individual ecological studies, sampling should be stratified to ensure a representative study. If we do not apply the same logic when tackling global questions, we will end up with biased data leading to wrong conclusions. Moreover, this imbalance hampers the improvement of management strategies, as for example, in the case of interhemispheric migrations of birds and marine species [60]. We therefore point to the need for promoting research in the Southern Hemisphere to tackle fundamental questions with a global perspective. Most research institutes are located in temperate zones of the Northern Hemisphere and ecological research, especially longterm studies, is biased toward these locations [5]. At the same time, long-term research in areas where researchers are not permanently based can be challenging due to economical limitations or cultural conflicts [61]. Possible solutions might be to foster cooperation and networking across the two hemispheres, to increase collaboration among researchers within the Southern Hemisphere, and to prioritize funding of research projects in the Southern Hemisphere and across hemispheres (Box 2). We envision a future when joint research among South American, Southern African, Australasian, and Pacific researchers will allow us to understand the processes generating the great biodiversity of the Southern Hemisphere. Investigating global change requires a global perspective. Research in the Southern Hemisphere is an essential part in such an endeavor.

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#### **Declaration of interests**

No interests are declared.

#### Resources

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