SCANNING ELECTRON MICROSCOPICAL STUDIES ON THE SPORES OF PTERIDOPHYTES.

VIII. THE TREE FERN FAMILY (CYATHEACEAE) AND ITS ALLIED SPECIES FOUND IN TAIWAN, (1,5)

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Abstract: The spores of seven species of Cyatheaeeae found in Taiwan are studied and analyzed. Incipient heterospory is found in two species of Alsophila having spinulose spores (A. metteniana and A. polophylla). Spinulose type of spores are also found in Sphaerapteris lepifera. Most other Alsophila have striated spores (A. deniculata, A. fepinicis, A. loheri, and A. spinulosa). The general evolutionary sequence of sculptine morphology in the Cyatheaeeae are discussed in terms of traditional systems of classification and the phylogeny proposed recently by Tryon. The psilate and striated spores of Cibotime unimagial and C. barnenet; (Dickoniaceae), respectively, are also studied and their possible phylogenetic relationship to the Cyatheaeeae evaluated.

INTRODUCTION

There are about 800 species in the tree fern family (Cyatheaceae), nearly equally distributed between the paleotropics and the neotropics. They are found throughout the wetter parts of the tropical and subtropical rain forests and some even grow in temperate regions, especially in the southern hemisphere (e.g. New Zealand).

Despite the longevity of these tree ferns and repeated attempts to solve the basic problems of systematics and evolution in this group of ferns, an unsatisfactory classification has persisted in the Cyatheaceae for a longer time than in any other of the large groups of ferns. There are uncertainties concerning the taxonomy of the two basic groups of genera, namely, the Cyathea group and the Dicksonia group with allied genera. There have been differences of opinions regarding infra-familial classification within the Cyatheaceae (Brown, 1810; Copeland, 1909, 1947; Domin, 1930; Holttum, 1963; Tryon, 1970).

The different systems of classification proposed for the tree fern family do not satisfy all those who were concerned. Indusial characters emphasized by previous workers are, to use an old adage "unfortunately for the science, upon the sorus there's no reliance". Any attempt to suggest any clearly definable morphological characters in the Cyatheaceae were futile (Holtum, 1957). However, in modern classification systems of the Cyatheaceae (Holtum, 1963; Tryon, 1970) scale characters are regarded as more important than the industal characters (DeWolf, 1953). We still have very broad morphological terms for which we have no precise understanding. Many more potentially useful characters need to be explored. The spore character is one among them.

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The literature on descriptions of the spore morphology of Cyatheaceae have generally been imprecise or evasive and far from dependable (Harris, 1955; Erdtman, 1957, 1971; Nayar, 1964; Kremp & Kawasaki, 1972. Partly because of their illusive, complicate or confusing sculptine patterns seen under ordinary light microscope (see Plate 1) little use has thus been made of these spore characteristics in classification and identification.

Because previous studies on the sculptine morphology of many fern spores have indicated that they offer both reliable and stable morphological characteristics which may be employed as dependable criteria in the identification of genera and species (Brown, 1960; Hires, 1965; Nayar & Devi, 1968; Wagner, 1974; Liew, 1976a), as well as in the tracing of possible affinities and trend of evolution between the genera and higher systematic categories (Wilce, 1972; Liew, 1976b), it seems highly probable that spore morphology may become a useful character in solving the basic problems of systematics and evolution of tree feras.

The present investigation is thus undertaken to resolve the differences in proposed systems of classification of the tree fern family, and to provide additional data on the characters used for the assessment of phylogenetic relationship and taxa demarcation. This communication reports the results of our study on the spores of Formosan tree ferns as revealed by light and scanning electron microscopes, and discusses the evolution of the spores of tree ferns in general. For purpose of comparison, members of the Dicksoniaceae found in Taiwan (Cibotium species) were also included.

MATERIALS AND METHODS

Spores of Formosan species of Cyatheaceae were taken directly from fresh materials collected in the fields by the authors. A few of them were taken from specimens deposited in the herbarium of the Department of Botany, National Taiwan University. Materials used for scanning electron and optical microscopical observations were listed in Table I.

Table I. A list of the Formosan taxa of tree ferns (Cyatheaceae and Dicksoniaceae) used in our scanning electron (SEM) and light microscopical (ŁM) studies. All specimens are deposited in TAI.

Taxon	Locality, Collection Number, LM or SEM		
1. Alsophila denticulata Baker	Taipei: Yangmingshan Taipei: Ta-dong-shan	Liew 1054 (SEM), Wang 17 (LM) Liew 2154 (SEM)	
2. A. fenicis (Copel.) C. Chr.	Orchid Isl.: Wang-nan-fung Orchid Isl.: Hung-tou-shan	Liew 9043 (LM, SEM) Liew 9068 (SEM)	
3. A. loheri (Christ) Tryon	Pingtung: Chin-shui-yin	Liew 8033 (LM, SEM)	
4. A. metteniana Hance	Keelung: Luan-luan Taipei: Pii-hu	Liew 1244 (SEM), Wang 27 (LM) Liew 2239 (SEM)	
5. A. podophylla Hooker	Taipei: Ta-dong-shan Nantou: Sun Moon Lake	Liew 2183 (SEM) Liew 6032 (LM, SEM)	
6. A. spinulosa (Hook.)	Taipei: Yangmingshan Taipei: Nui-shuan-chi Taipei: Wulai	Wang 11 (LM) Liew 1096 (SEM) Liew 2142 (SEM)	
 Sphaeropteris lepifera (Hook.) Tryon 	Taipei: Yangmingshan Taipei: Ta-dong-shan Orchid Isl.: Chung Sing Farm	Liew 1071 (SEM) Liew 2160 (LM) Liew 90195b (SEM)	
 Cibotium barometz (L.) J. Sm. 	Taichung: Nan-shih Nantou: Sun Moon Lake	Liew 5037 (SEM) Kuo 1827 (SEM)	
9. C. cumingii Kunze	Taipei: Chuk-tze-shan Taipei: Yangmingshan	Wang 100 (SEM) Moo & Hsu 1221 (SEM)	

For light microscopy, spores were dispersed in a drop or two of Hoyer solution and observed. Detail of methods of preparation and observation on scanning electron microscope were as described before (Liew, 1975). Briefly, spores of individual taxon were dusted or carefully transferred from the sporangia to a piece of clean paper with uncontaminated tooth pick and mounted in a drop of Hoyer solution for preliminary observation under light microscope. After justifying the proper identity of the spores concerned, some of the materials were used directly for scanning electron microscopy. The spores were adhered to a double sided scotch tape attached onto a metalic stub and coated first with carbon, and then with a thin layer of gold inside a manual or automatic rotatory vacuum evaporator. It was then observed with a scanning electron microscope (Joel JSM U.3) operating at accelerating voltages ranging from 5 to 15 kv and under magnification from 100x to 10,000x.

RESULTS

The spinulose spores of both Alsophila metteniana and A. podophylla have two different sizes within one sporangium, one smaller than the other. For ten measurements, the larger spores measure about $30-35~\mu \times 35-41~\mu$ (polar × equatorial diameters), and the smaller ones $23-27~\mu \times 28-31~\mu$. Incipient heterospory is thus suspected.

The two genera of Cyatheaceae found in Taiwan, Alsophila and Sphaeropteris, are characterized by trilete, tetrahedral spores, with triangular amb commonly having straight or concave sides, and prominent or rather inconspicuous laesural arms, with a size of about 23-35 $\mu \times 28$ -41 μ for ten readings. (Plates 1 to IV)

The results of our study indicate that two major classes of sculpture patterns may be distinguished within Formosan Cyatheaceae. The sculptine morphology of one group of the spores is striated, the ridges of which sometimes crack and peel off as small flakes (Plate II). It includes four species of Alsophila found in Taiwan. They are A. denticulata, A. fenicis, A. toheri, and A. spinulosa. The other group of tree ferns is found to have spinulose type of spore sculpture (Plate III), and it includes Alsophila meteriana, A. podophylla and Sphaeropteris lepitera.

There are differences in the density, distribution, kinds and degree of pointedness of the spines in the spinulose spores. Such is also the case for the flakes or ridges of the striated spores. By using sculptine characteristics species identification and delimitation is possible within the seven species of Formosan tree ferns. A key to the several taxa of tree ferns found in Taiwan are given as below. Detailed descriptions of these spores will be the subject of a latter communication.

A KEY TO THE FORMOSAN SPECIES OF TREE FERNS BASED ON PALYNOLOGICAL CHARACTERISTICS

- 1. Spores striated, forming flakes or thin and high ridges
 - 2. Spores with larger and more irregular flakes
- 1. Spores spinulose, spines acicular or with broad base
 - 5. Spines in blocks, numerous, closely associated; spores of two sizes

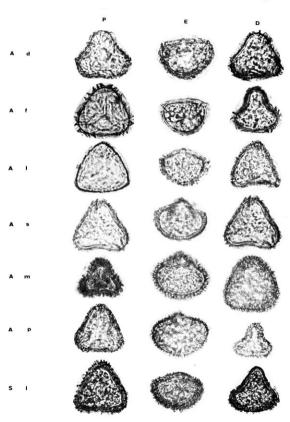


Plate 1. Untreated spores of seven species of Formosan Cyatheaceae as seen under the light microscope, For each species there faces of the spore were examined. From left to right, column P for proximal view, E for equatorial view, and D for distal view. Each row represents three spores of one species. From top to bottom, they are: row A. d. for Alsophila denicalar; A. f. for A. fendisz, A. f. for A. fondisz, A. f. for A. fondisz, A. f. for A. fondisz, A. f. for A. prindisz, A. m. for A. metenianiz, A. p. for A. padophylla; and S. I. for Sphaeropteris leptfera. All micrographs are of the same magnification of 49 times, or one centimeter equals approximately 19 µ.

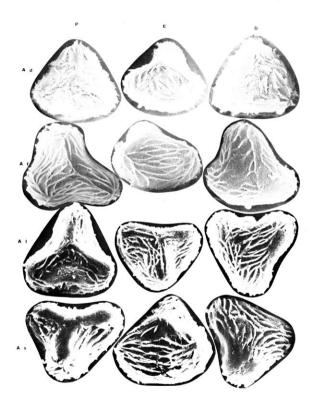


Plate II. Scanning electron micrographs of the striated spores of Formosan Cyatheaceae. Legends are as in Plate I. From top to bottom the species are: row A. d. for A. denticulata; A. f. for A. fenicis; A. l. for A. boheri; and A. e. for A. grinulosa. All micrographs are magnified 1,000×, or one centimeter equals to 10_{th}. The magnification for the equatorial view of the spore of A. denticular is exceptional. It is magnified 1,250×.

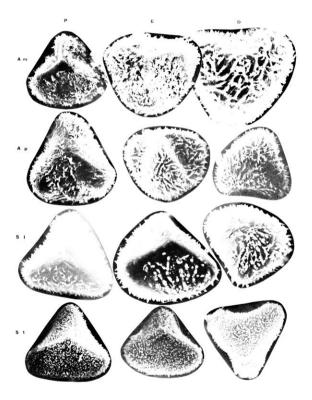


Plate III. Scanning electron micrographs of the spinulose spores of Cyatheaceae.

Legends are as in Plate I. From top to bottom the species are: row A m. for A neutestians: A, p, for A podophylla; S, L for S phaeapyteris I legifier; and S, L for the Philippine species of S. tripinana. All micrographs are magnified 1,000S, or one centimeter equals to 10 μ . The magnification for the distal view of A metentiana is exceptional. It is magnified 1,250S.

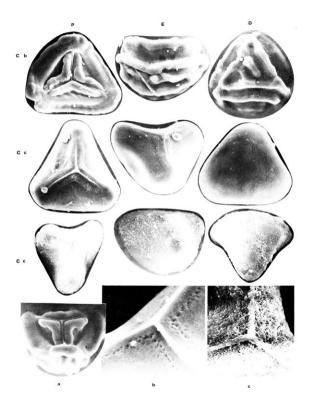


Plate IV. Scanning electron micrographs of the spores of Clobaliums found in Taiwan. Legends are as in Plate I, except the last row. From top to bottom the species are: row C. b. for Clobalium baromet; second row C. c. for C. camingii (Moo & Hsu 1221, Yangmingshan); third row C. c. for the same species, but from different collection and locality (Wang 100, Cluk-tze-shan). Three closs-up views of the spores of Clobalium are given in the last row. Small holes distributed near laesural ridges are clearly shown in figs. a and b, and the covering layer in fig. c. All microgrophs are of the same magnification of 750×, or one centimeter equals to 13.4 µ. The magnification of the proximal- and distal-views of the third row C. c. (\$00×, 1 cm=20.µ), and last row figs. b and c (1,500×, 1 cm=6.7 µ) are exceptional.

Spores of Ciboium are very differently sculptured (see Plate IV). For C. barometz, the tetrahedral trilete spore has thick, raised, long plane or circumfluent field-distal ridges on the editad surface, annulate equatorial ridges on the equator, and with three either short or long plane field-laesural ridges along the margo of the laesural arm in the proximal face. C. cumingii is found to have similar laesural margo, with or without inconspicuous narrow band-laesural ridges. But both of the proximal and distal surfaces are pilate or smooth. Both species of Ciboiums are unique in having a row of small holes (fovea) distributed on each laesural ridge (Plate IV). Spores of Ciboium are larger than the tree ferns Alsophila and Sphaeropteris, averaging 36u×47u in polar and equatorial diameters respectively.

The actual identity of the spores of Cibotium species found in Taiwan is not fully established. Spores of C. baromer: found in Taiwan (e.g. Kuo 1827) and other areas (e.g. Carricic 634 of Malaya, in KLU) are distinctive in having laesural-equotrial- and distal-ridges. However, some Malesian taxa of Cibotium cumingii studied by the present authors are also found to have spores of similar structures, for example, in the Philippine taxa, Elmer 22023 (Luzon, in SING) and Quisambing 2221 (Luzon, in SING), and in the Malaysian taxa, Clemens 29672 (Borneo, in SING) and Clew, Corner & Stainton 998 (Mt. Kinabalu, in SING). Moreover, in Taiwan, C. cumingii are found to have two types of spores (see Plate IV). One with a thin layer of amorphous coverings on their surfaces (e.g. Wang 100, third row C. c. in Plate IV, presumably spores are fully mature) while the others are psilate (e.g. Moo & Hsu 1221, second row C. c. in Plate IV, spores may be younger, but they are the most common spores found in this species.)

DISCUSSION

1. Incipient Heterospory

The prescence of two sizes of spores within a sporangium is a new finding in tree ferns not reported before. Such a situation is common in both Alsophila metteniana and A. polophylla found in Taiwan. This is not due to artificial shrinkage because we did not acetolyze the spores, and the possibility of differences in developmental stage is also ruled out because they are found within the same sporangium. It is not hybrid abnormality either because the spores are perfectly normal except the difference in sizes. It might be another case of incipient heterospory in ferns (Tryon, 1964).

2. Cyatheaceae

We have studied the spores of all the seven species of Formosan Cyatheaceae, and found their sculptine patterns are either spinulose or striated (see Plate I to IV). We have also checked the spores of several other Cyatheaceae taxa found in neighbouring Malesian region. For example, in Sphaeropteris, S. tripinnata (Copel.) Tryon of the Philippines (Mindano, San Ravior; E. B. Copeland, s.n., 1907) and S. glauca (Bl.) Tryon of Malaya (Selangor, Ulu Gombalk Road; E. E. Khoo, s.n., May 26, 1970) are found to have spinulose spores. In Alsophila, both Malayan species of A. commutata Mett. (Pahang, Gunong Ulu Kali Road (4.1 mi.), 3,650 ft.; E. A. Turnau I,187, Jan. 16, 1968) and A. glabra (Bl.) Hook. (Pahang, Gunong Ulu Kali Road (4 mi.), 3,550 ft.; E. A. Turnau I,184, Nov. 1, 1967) are also found to have spinulose spores.

Attempts to select and accommodate our present finding on spore morphology with both old and new schemes of classification of the tree fern family (Smith, 1793; Brown, 1810; Copeland, 1999, 1947; Holttun, 1963; Tryon, 1970) were met with difficulties of explanation (Ta-

ble II). The scheme recently proposed by Tryon (1970) appears to best explain our results. In his phyletic arrangement of the squamate genera of the Cyatheaceae that have dorsal sori Tryon derived two independent family branches for the scaly tree ferms from ancestors at the evolutionary level of the genus Sphaeropteris. One branch consists of Alsophila and Nephelea with apically setate, structurally marginate petiole scales, the other consists of Trichipteris, Cyathea, and Cnemidaria with apically non-setate and structurally fabellioid petiole scales.

Table II. The sculptine patterns of the spores of the tree fern family found in Taiwan and its relationship to the different systems of classification proposed.(1)

Chief Diagnostic Character					
Sorus	Indusium	Indusium & Scale	Scale	Spore	
Smith, 1793	Brown, 1810	Holttum, 1963, 1974	Tryon, 1970	Liew & Wang, 1976	
I. Cyathea (Sori dorsal)	I. Cyathea (Indusium complete)	Cyathea 1. Subgenus Alsophila (Stipe scale flabelloid) a. Section Alsophila (Sori indusiate)	I. Alsophila (Stipe scale marginate)	I. Alsophila (?) (Spore striated or spinulose)	
1. C. fenicis	C. f.	C. f.	A. f.	A. f. (striated)	
2. C. loheri	C. 1.	C. I.	A. I.	A. I. (striated)	
3. C. spinulosa	C. s.	C. s.	A. s.	A. s. (striated)	
	II. Alsophila (Indusium reduced or absent)	b. Section Gymnosphaera (Sori exindusiate)			
4. C. denticulata	A. d.	C. d.	A. d.	A. d. (striated)	
5. C. metteniana	A. m.	C. m.	A. m.	A. m. (spinulose)	
6. C. podophylla	A. P.	C. p.	A. p.	A. p. (spinulose)	
		II. Subgenus Sphaeropteris (Stipe scale setiferous) a. Section Sphaeropteris (Costules not widely spaced)	II. Sphaeropteris (Stipe scale conform)	II. Sphaeropteris (?) (Spore spinulose)	
7. C. lepifera	A. I.	C. I.	S. 1.	S. 1. (spinulose)	
		b. Section Schizocaena (Costules widely spaced)			

⁽¹⁾ Some additional Malesian species of Alsophila and Sphaeropteris were examined. The following taxa were found to have spinulose spores: (1) A. commutata (Malaya), (2) A. glabra (Malaya), (3) S. glauca (Malaya), and S. tripinnata (The Philippines).

In terms of spore evolution it seems probable that, in one branch, while evolving from conform (Sphaeropteris) to setate and marginate petiole scales (Alsophila and Nephelea) the spore has evolved in the direction of changing from spinulose (Sphaeropteris) to striated spore sculptine (Nephelea), with the intermediate genus (Alsophila) comprising mixed spore sculptine of both types. In the other branch, concomittant with the evolution from setiferous (Sphaerop-

teris) to non-setate and flabelloid petiole scales (*Trichipteris*, *Cyathea*, and *Cuemidaria*) the general form of sculptine evolution has changed from spinulose sculptine (*Sphaerozteris*, *Trichip*teris) to having small apertures or depressions arranged at random or in vague patterns along the surface (*Cyathea*), to the reduction of spores devoid of perine and having one large pore located near the center of each side, on or near the equator (*Chemidaria*).

Under such an evolutionary scheme Alsophila could be conceived of as a genus of mosaic characters, containing species with both primitive or generalized (spinulose) and specialized (striated) spore characteristics. Such would also be the case for the transitional genera Trichipteris and Cyathea in the other branch of the evolutionary line.

Despite the fact that some feel that Tryon has not really justified the recognition of his groups as independent genera (Morton, 1971; Holttum, 1974), his seemingly "one-character" classification system does provide us with a working framework, and the full range of many studies can be assessed. In addition to taxonomic reviews (Tryon, 1971; Gastony, 1973; Barrington, 1974; Conant, 1974; Tryon, 1974; Windisch, 1974; Stoltz, 1974) recent research on many aspects of the Cyatheaceae do, in general, support his pilvletic scheme.

Based on a broad anatomical study of the Cyatheaceae Lucansky concluded that "the squamate genera in the Cyatheaceae shows striking similarities in both anatomical and morphological characters, and constitutes a natural grouping" (Lucansky, 1974b), and that "data from nodal and vascular anatomy basically support Tryon's phyletic scheme for the family" (Lucansky & White, 1974). However, substantially dissimilar results obtained after extensive and critical investigations made on Formosan materials of Alsophila and Sphaeropteris species compelled us to accept their observations and conclusions with reservation (Wang, 1976).

In terms of sporangial capacity types the distribution is in accordance with the generic phyletic scheme proposed by Tryon (Gastony, 1974). The 64-spores sporangia found in Sphaeropieris are shown to be carried over into the Trichipteris-Cyalhea-Chemidaria branch whereas the Alsophila-Nephelea branch is associated with the reduced spore number of 16. Hairy genera of the tree ferns (Lophosoria and Metaxya) also have 64 spores per sporangium. The distribution of the perine is also, in general, congruous with the scheme proposed by Tryon (Gastony, 1974). It is found that in one branch, perine is either present or absent in intermediate genera (Trichipteris and Cyalhea), and becoming completely lost in Chemidaria. On the other hand, perine is present from Sphaeropteris to Alsophila and Nephelea. The two genera of hairy tree ferns are also perinous.

These studies and our finding on the sculptine pattern of Formosan species of Alsophila and Sphaeropteris would not fit in any of the classical classification system, such as the three genera system (Cyathea, Hemitelia and Alsophila) of Brown (1810), the system that recognized only the comprehensive genus Cyathea (Copeland, 1947; Holttum, 1963), or the one that considered only Cremidaria as generically distinct from Cyathea among the scaly tree ferns (Holttum & Sen, 1961).

However, Tryon's system is not the only final resolution for the tree fern family. Many characters sorely needed for the tree ferns were not studied and many aspects of basic and botanically significant research has not been done. For example, the chemical and serological relationship of these plants have scarcely been touched upon (Lin & Lin, 1965). Detail studies on the morphological, developmental and structural variabilities in Cyatheaceous sculptine are also badly needed. They may help to resolve some of the basic problems of systematics and phylogeny of tree ferns. Results of our investigation in this direction will be reported later when data become sufficiently available for analysis. A better natural system for the tree ferns which will accomodate all the data acquired should continually be sought.

3. Cyatheaceae-Dicksoniaceae Relationship

In his revised classification of the family Cyatheaceae, Tryon (1970) left the taxonomic

aligment of the Dicksonoid genera in abeyance. He did indicated that some evidence suggested that hairy Cyatheaceae might be closer to the Dicksoniaceae than to the scaly Cyatheaceous genera.

These tree ferns have undergone many tavonomic changes at the family level, and systems of classification for them have periodically been revised. In the early days when the position and the structure of sori were the overriding criteria in classification, Crathea (sori superficial, with or without true indusia) and Dicksonia (sori marginal, with or without outer indusia) were placed in distinct tribes (Brown, 1810). Latter, the two basic groups of genera and their allied genera were then placed in the single family Cyatheaceae (Mettenius, 1856; Diels, 1902; Christensen, 1905; Maxon, 1911). Placing major emphasis on soral position Bower (1926) created three families for the group (Protocyatheaceae, Cyatheaceae, and Dicksoniaeae). Following Bower, most botanists reverted to the earlier view and separated the Cyathea and Dicksoniae allies into two distinct families, the Cyatheaceae and Dicksoniaeae (Christensen, 1938; Coreland, 1947, 1958).

Based upon morphological, developmental, and anatomical characters Holtum and Sen (1901) again incorporated Metaxya and Lophosoria and the Dicksonioid genera into a single family, the Cyatheaceae (Holtum, 1963). Earlier reports dealing with the anatomy of paleotropical species of tree ferns indicated similar results (Gwynne-Vaughan, 1903; Stephenson, 1908; Ogura, 1927, 1972; Sen, 1964). Recent comparative studies on nodal and vascular anatomy in neotropical Cyatheaceae also pointed out that hairy genera (Lophosoria and Metaxya) show, in some respects, an affinity to members of the Dicksoniaceae (Lucansky, 1974a; Lucansky & White, 1974).

The present investigation on the sculptine morphology of the spores of Formosan tree ferns indicates that possible relationship between Dicksoniaceae (Clbotium barometz and C. cumingii) and the scaly Cyatheaceae (Alsophila and Sphaeropteris species) are quite remote and distant, although not totally unconnected. Hairy genera with striated spores (Erdman, 1957; Holtum & Sen, 1961; Gastony, 1974) belonging to an independent position at the base of the Cyatheoid line may be closer to the Dicksoniaceae than to the scaly Cyatheaceae. However, more information is needed before the evolutionary line in the Dicksonioid-Cyatheoid alliance can clearly be traced, and the family of families can be recognized with assurance.

Since our results were based on observations of the species of genera of Cyatheaceae found only in Taiwan and a small number of other Cyatheaceous members of the Malesian region, our preliminary inference reached must not be considered or accepted as the final conclusion. It will undoubtedly be corrected and amplified by further investigation of this group.

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