

The phasevarion: A genetic system controlling coordinated, random switching of expression of multiple genes

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Several host-adapted bacterial pathogens contain methyltransferases associated with type III restriction-modification (R-M) systems that are subject to reversible, high-frequency on/off switching of expression (phase variation). To investigate the role of phase-variable expression of R-M systems, we made a mutant strain lacking the methyltransferase (*mod*) associated with a type III R-M system of *Haemophilus influenzae* and analyzed its phenotype. By microarray analysis, we identified a number of genes that were either up- or down-regulated in the *mod* mutant strain. This system reports the coordinated random switching of a set of genes in a bacterial pathogen and may represent a widely used mechanism.

DNA methyltransferase | *Haemophilus influenzae* | phase variation

Restriction-modification (R-M) systems are frequently found in bacteria and generally are thought to confer protection to the bacterial host against infections by foreign DNA (1). Type III R-M systems are composed of two subunits: Restriction (Res) and Modification (Mod) enzymes, which are encoded by the *res* and *mod* genes, respectively. Res catalyzes the double-stranded cleavage of unmethylated foreign DNA at a specific recognition sequence. Mod catalyzes the methylation of DNA at the same sequence, protecting host DNA from cleavage (2, 3). DNA recognition sites of type III R-M systems are asymmetrical, and methylation is only on one strand (4).

Several studies have reported methyltransferases associated with type III R-M systems in pathogenic bacteria [*Pastuerella haemolytica* (5), *Haemophilus influenzae* (6), *Neisseria meningitidis*, *Neisseria gonorrhoeae* (7), *Helicobacter pylori* (8), and *Moraxella catarrhalis* (9)] that have sequence features that are consistent with phase-variable expression. Phase variation is the reversible, high-frequency on/off switching of expression, and it is usually mediated by mutations in simple DNA repeats located either within the ORF of genes encoding variant proteins or in their promoter region (10, 11).

Many genes encoding virulence factors in bacterial pathogens display phase-variable expression, such as pili (12), iron-binding proteins (13, 14), lipopolysaccharide biosynthesis genes (15, 16), and outer-membrane proteins (17). Phase variation results in genetically and phenotypically diverse populations, which is important in pathogenesis because it provides a strategy for rapid adaptation to changes within the host environment and immune response (18). The existence of such phase-variable methyltransferases raises the possibility of a role for phase variable type III R-M systems in pathogenesis, such as differential immune stimulation and gene regulation (9).

To examine the biological role of phase variation of methyltransferases from type III R-M systems, we chose the *mod* gene of *H. influenzae* strain Rd (HI1058/HI1056) as a model system. *H. influenzae* is an obligate, host-adapted bacterial pathogen that colonizes the upper respiratory tract. It is the second leading cause of community-acquired pneumonia and accounts for several thousand deaths annually worldwide, especially in chil-

dren (19). Of the potentially phase-variable type III R-M systems that have been described (9), the *mod* gene of *H. influenzae* is the only example in which phase-variable expression, mediated by tetranucleotide repeats, has been confirmed experimentally (6). Also, only one type III R-M system is present in strain Rd, and microarrays for strain Rd are commercially available. The *mod* gene of *H. influenzae* contains tetranucleotide repeats (5'-AGTC-3') within its ORF, and strains have been observed with a repeat-number range of 2–41 (6). The rate of phase variation depends on the number of repeats that are present in the gene; a greater number of repeats increases the frequency of phase variation. High phase variation rates may be significant in infections by *H. influenzae* (6).

Experimental Procedures

Bacterial Strains and Growth Conditions. *H. influenzae* strains were grown at 37°C in brain–heart infusion (BHI) supplemented with either hemin (10 mg/liter) and NAD (2 mg/liter) in liquid medium or Levinthal supplement in solid medium with 5% CO₂. *Escherichia coli* strains DH5 α and JM109 (Promega) were used to propagate cloned plasmids and were grown at 37°C in LB broth supplemented with either ampicillin (100 μ g/ml) or kanamycin (50 μ g/ml).

DNA Manipulation and Analysis. All enzymes were sourced from New England Biolabs. PCR was performed with oligonucleotides purchased from Prolog (Boulder, CO). Sequencing was performed on PCR products by using QiaQuick gel extraction kit (Qiagen, Valencia, CA) and Big-Dye (PerkinElmer) sequencing kits. Sequencing reactions were submitted to the Australian Genome Research Facility (University of Queensland) and analyzed by using an ABI 3700 automatic sequencer (Applied Biosystems International). Data were analyzed by using SEQED (version 1.0.3). The sequences of primers used in this study are given in Table 2, which is published as supporting information on the PNAS web site.

Construction of a Knockout Mutant of the *mod* Gene and Insertion into *H. influenzae* Strain Rd. The *mod* ORF was amplified by PCR with primers Him1 and Him2. The PCR product was cloned into the pGEM-Teasy (Promega) vector. This construct was digested with *Mfe*I and blunted by using Klenow polymerase (New England Biolabs). The Tn903 *kan* resistance gene from the pUC4K vector (Pfizer) was excised by using *Hinc*II and inserted into the blunt *Mfe*I site. The resulting plasmid, pGEM*mod::kan* was linearized by digestion with *Eco*RI and used to transform competent *H. influenzae* Rd (20). Rd*mod::kan* transformants were selected on BHI plates containing Levinthal supplement

Abbreviations: R-M, restriction modification; Res, Restriction; Mod, Modification; BHI, brain–heart infusion.

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and 10 $\mu\text{g}/\text{ml}$ kanamycin (Fig. 3 and *Supporting Experimental Procedures*, which are published as supporting information on the PNAS web site). *Rdmod::kan* transformants were confirmed by PCR and sequence analysis using primers Him1 and Him2 and kanamycin-specific primers kanfor and kanrev (see Table 2). RNA midi-preps of both the WT (Rd) and mutant (*Rdmod::kan*) were made by using the RNeasy Midiprep kit (Qiagen). The WT *H. influenzae* Rd colonies that were used to make RNA for microarray analysis were sequenced to check that *mod* gene expression was from the Distal ATG.

Construction of Translation Fusion Between the *opa* Gene and *lacZ* Gene and Insertion into *H. influenzae* Strain Rd. An *opa-lacZ* fusion was constructed in *H. influenzae* Rd. The gene fusion was constructed initially in *E. coli*, with subsequent transformation into the *H. influenzae* chromosome. In the fusion construct, the codons for LacZ are in the same translational frame as Opa, resulting in an in-frame Opa-LacZ fusion protein. A 2.0-kb DNA fragment of the Opa ORF was amplified by PCR using the primer pair 1457F and 1457R and strain Rd as the template. The reaction was performed in 50 μl by using 1 \times *Taq* buffer, 1.5 mM MgCl_2 , and 1 unit of *Taq* DNA polymerase (Promega) with the following cycling conditions: 30 cycles of 94°C for 30 s, 56°C for 30 s, and 72°C for 1 min, and one cycle of 72°C for 7 min. The fragment was then cloned into vector pGEM-Teasy (Promega). A 4-kb fragment of a promoterless *lacZ::kan* fragment was amplified by PCR using the primer pair *LacZStuI1* and *KanStuI*. The plasmid pBluescript*lacZ::kan* (M. Dieckelmann, personal communication) was used as template. The PCR was performed in 50 μl by using 1 \times *Taq* buffer, 1.5 mM MgCl_2 , and 1 unit of *Taq* DNA polymerase (Promega) with the following cycling conditions: 30 cycles of 94°C for 30 s, 50°C for 30 s, and 72°C for 4 min, and one cycle of 72°C for 7 min. After digestion with *StuI*, the 4.0-kb *lacZ::kan* fragment was then ligated into the *StuI* site of the *opa* construct. The ligation mixture was transformed into *E. coli* JM109 and transformants were selected on LB agar plates supplemented with kanamycin (50 $\mu\text{g}/\text{ml}$; Sigma). The orientation and sequence of the insert were checked and found to be correct. The resulting construct was named pGEM*opa::lacZ::kan*. This plasmid was linearized with *SacII* and used to transform competent *H. influenzae* (see *Supporting Experimental Procedures* and Fig. 4, which are published as supporting information on the PNAS web site). The *Rdopa::lacZ::kan* transformants were streaked on BHI plates containing Levinthal supplement and X-gal (5-bromo-4-chloro-3-indolyl-D-galactopyranoside; 40 $\mu\text{g}/\text{ml}$). Blue and white color transformants were picked and the *mod* repeat tract sequenced by using the primers Him1 and Him3 to confirm that the *mod* tract was out of frame (Off) or in frame (Distal).

β -Galactosidase Assay. The appropriate strains were grown on BHI plates at 37°C with 5% CO_2 , and plate culture cells were taken after 16–18 h of growth. The cells were scraped into PBS and lysed by repeated freeze–thaw cycles. The cell debris was removed by centrifugation at 15,000 $\times g$ for 10 min. The amount of protein was calculated by using the BCA protein assay reagent kit (Pierce), and extracts were adjusted so that equivalent amounts of protein were used in the assay. The amount of β -galactosidase in the cell extracts was measured in Miller units, in triplicate, as described (21). Miller units were calculated as follows: $\text{Units} = (1,000 \times A_{420}) / (t \times v \times C)$, where t is the time of assay (in min), v is the volume of cell extract used in the assay (in μl), and C is the total protein concentration (in $\mu\text{g}/\text{ml}$).

Northern Blot Analysis. RNA was separated by electrophoresis on 1% denaturing formaldehyde/agarose gels. Northern blotting onto GeneScreen membrane (DuPont) was accomplished by means of capillary action using the wick-transfer method in 10 \times

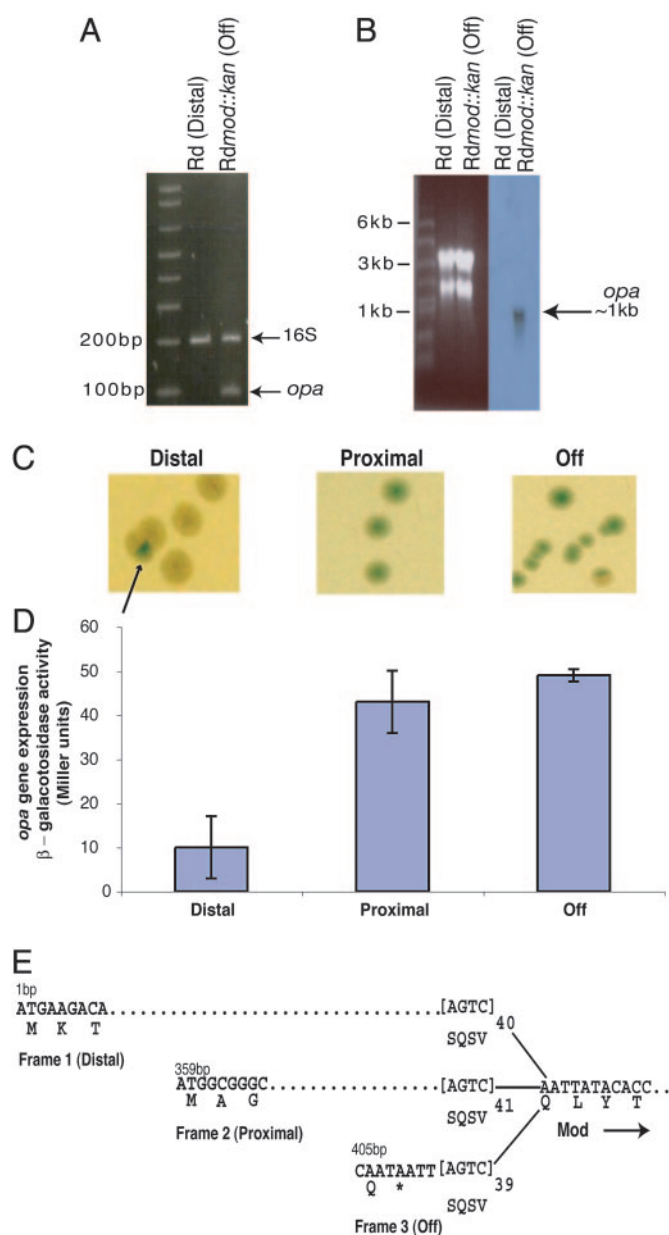


Fig. 1. Effect of *mod* phase variation on expression of the *opa* gene (HI1457). (A) RT-PCR shows expression of the *opa* gene in *Rdmod::kan* but not WT Rd (Distal). 16S RNA was amplified as a control. (B) Northern blot analysis showing a higher level of *opa* transcriptional expression in *Rdmod::kan*. A band of ≈ 1 -Kb corresponds to the expected size of a putative operon of two genes HI1457 (*opa*) and HI1456. (C) Phenotypic validation that *opa::lacZ* gene expression depends on phase variation of the *mod* gene. *Rdopa::lacZ* colonies with the *mod* 5'-AGTC-3' repeat tract in frame with the Distal ATG (resulting in active Mod) were white (40 or 37 repeats), indicating low *opa::lacZ* expression. Colonies that phase varied to a blue phenotype (arrow indicates an example) were observed and picked, and the *mod* repeat region was sequenced to determine whether change in *opa::lacZ* expression correlated with *mod* phase variation. Blue colonies were found to have switched from Distal (40 repeats) to be in frame with either the Proximal ATG (41 repeats) or Off (39 repeats). Colonies that switched back from blue (39 repeats) to white were found to be in frame with the Distal ATG (40 or 37 repeats). (D) β -galactosidase assays showing quantitative differences in the level of *opa::lacZ* gene expression resulting from *mod* repeat tract changes (Distal, Proximal, or Off). A 5-fold difference in expression was observed between Distal and Proximal/Off, consistent with the array and quantitative PCR data. (E) Schematic diagram showing that translation of the *mod* gene is initiated from one of three frames (Distal, Proximal, or Off), depending on the number of 5'-AGTC-3' repeats.

1 and Supporting Experimental Procedures and Fig. 5, which are published as supporting information on the PNAS web site). The Distal start gave maximum expression, the Proximal start showed low expression (2.5% of maximum), and the third reading frame (which has no candidate ATG and a stop codon immediately before the 5'-AGTC-3' repeats) was "Off."

Analysis of Differentially Expressed Genes in WT (Distal) Versus the *mod::kan* Mutant (Off). To determine the biological role of phase-variable expression of the *H. influenzae mod* gene, a *mod* knockout mutant was constructed by interrupting the *mod* gene with a kanamycin antibiotic resistance marker and transferring this inactivated allele to the chromosome of strain Rd to create strain *Rdmod::kan* (Fig. 3). Comparison of the phenotype of this mutant strain with strain Rd, in which the *mod* gene was maximally expressed (Distal start, 40 repeats; see Fig. 1E), formed the basis of subsequent studies.

DNA methylation has been shown to be involved in regulating bacterial gene expression and virulence by changing the affinity of regulatory proteins for DNA. Alternatively, DNA target sites can be protected from methylation by the binding of regulatory proteins to nonmethylated sites (23–25). To examine the possibility that phase-variable methyltransferase activity may randomly switch the expression of virulence factors, gene expression of WT Rd (Distal) and *Rdmod::kan* was compared by microarray analysis on *H. influenzae* strain Rd arrays (Integrated Genomics). Seven genes were up-regulated in *Rdmod::kan* relative to WT, and nine genes were down-regulated (Table 1), confirming that expression of the *mod* gene has a direct influence on gene expression. Two genes are surface-exposed proteins; HI0661 (*hgpB*) encodes a TonB-dependent outer-membrane protein mediating the binding and utilization of hemoglobin-haptoglobin (13, 14), and HI1457 (*opa*) encodes a homologue of NspA from *N. meningitidis* an outer-membrane protein that is a potential vaccine candidate (26). These proteins are typical examples of those expected to display phase-variable expression because of functional and/or immune selection. The selective pressure for phase variation is further supported by the observation that the *hgpB* gene also contains a 5'-CCAA-3' repeat tract within its coding sequence, mediating phase variation at the translational level (13, 14). These data suggested that this set of genes was subject to phase-variable expression dependent on Mod activity.

In addition to the OMPs, there were two other groups of genes given in Table 1 that are subject to *mod*-dependent phase-variable expression. The first group is a series of genes encoding various transport functions, three with homology to various amino acid transport proteins. HI1080, HI1079, and HI1078 are potentially part of an operon, one with homology to a uracil permease (HI1227) and one that encodes *hbpA* (HI0853) involved in heme binding and transport (27). It is possible the coordinated phase-variable expression of this group of transporters represents a switch between two distinct microenvironments within the host (28).

The second group of genes with related function that are subject to *mod*-dependent phase-variable expression are five heat-shock genes: HI0104 (*hspG*), HI0542/3 (*dnaKJ*), and HI1237/8 (*groEL* and *groES*). These genes encode highly conserved proteins in bacteria, HtpG, DnaKJ, and GroELS, which have important roles in cell physiology as molecular chaperones. Transient induction of heat-shock proteins is a vital protective mechanism to cope with various sources of physiological and environmental stress at the cellular level. Evidence suggests that one of these chaperones, DnaK, may have a direct role in the pathogenesis of *H. influenzae* in cell adhesion (29, 30).

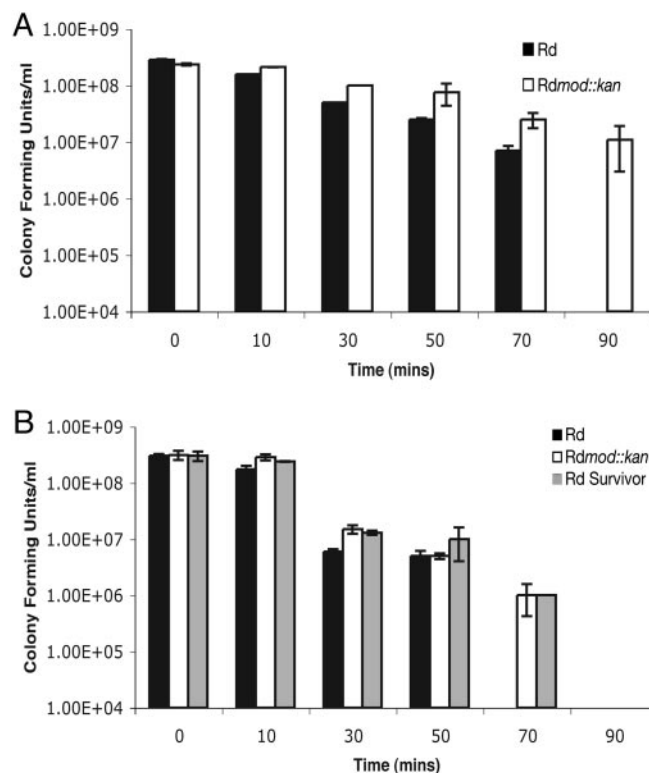


Fig. 2. Comparison of WT Rd (Distal) and *Rdmod::kan* in a heat-shock killing assay; selection of *mod* phase variants with increased heat-shock resistance. Cells were incubated at 46°C, and samples were taken at 10-min intervals, diluted, and plated onto BHI plates for determination of viable colony-forming units. (A) Comparison of WT Rd (Distal) and *Rdmod::kan* revealed that *Rdmod::kan*, in which the heat-shock proteins are up-regulated, is markedly more resistant to heat shock than WT Rd (Distal). A Student's *t* test showed a significant difference at time points of 10–90 min ($P \leq 0.00506$). Analysis of WT Rd (Distal) from the last time point containing viable cells (70-min time point), hence Rd survivors, showed that 33% were phase variants in which the *mod* gene had switched from Distal to Off (i.e., from 40 to 39 repeats). (B) Comparison of WT Rd (Distal), *Rdmod::kan*, and the Rd survivors pool (derived from the 70-min time point of the previous assay) (see A) showed a significant difference between Rd (Distal) and Rd survivors at time points 10–70 min ($P \leq 0.04712$), but not between *Rdmod::kan* and Rd survivors. Analysis of the Rd survivor group from the last time point containing viable cells (50-min time-point) revealed that 67% of the survivor colonies had the *mod* gene switched to Off (starting population was 33% Off).

***mod* Gene Phase Variation Linked to Phase Variation of the *opa* Gene.**

To confirm that reversible, high-frequency on/off switching of *mod* expression resulted in phase-variable expression of this set of genes, a LacZ reporter fusion was made in HI1457 (*opa*) and transferred to the chromosome of strain Rd (Fig. 4). *Opa* gene expression was directly linked to phase variation of the *mod* gene. Colonies with a white phenotype (low *opa::lacZ* expression; Fig. 1 C and D) had a *mod* repeat region in frame with Distal start (40 repeats) (Fig. 1E), resulting in maximal Mod expression. Colonies that switched from white to a blue phenotype (high *opa::lacZ* expression; Fig. 1 C and D) were all *mod* phase variants that were in frame with Proximal (41 repeats) or Off (39 repeats) (Fig. 1).

***mod* Gene-Mediated Phase Variation of Heat-Shock Proteins.** The coordinated phase variation of the heat-shock proteins HI0104 (HtpG), HI0542/3 (DnaKJ), and HI1237/8 (GroELS) would result in the generation of two distinct populations, one presumably more fit to respond to environmental stress. To test this hypothesis, a 46°C heat-shock killing assay was conducted, which

