Molecular Pathology of Rickettsial Lung Infections

J. Stephen Dumler

Introduction

Rickettsial infections of humans comprise a diverse group of infections caused by pathogens that are obligate intracellular bacteria with a genetic relationship, including the genera Rickettsia, Orientia, Ehrlichia, and Anaplasma. The host cells of these pathogens largely belie the systemic clinical manifestations, because Rickettsia and Orientia infect endothelial cells, and Ehrlichia and Anaplasma infect circulating leukocytes (monocytes and neutrophils, respectively). Thus, the predominant manifestations (fever, headache, myalgia, with or without rash) do not usually focus attention on the respiratory system; however, the underlying pathogenesis of these infections involves degrees of vascular compromise either by direct injury and inflammation or by the action of vasoactive proinflammatory molecules such as cytokines, chemokines, and prostaglandins. Given that the lung possesses the largest vascular bed in the human body, it is not surprising that pulmonary involvement is periodically identified and, when severely affected, is considered a potentially life-threatening complication.1,2

The precise microbial molecular pathogenetic mechanisms and the relative contributions of molecular proinflammatory responses toward pulmonary infection with these pathogens are in general poorly understood. However, recent years have seen significant advances in understanding the principles of how these obligate intracellular pathogens interact with host cells to exert direct influence over cellular function and integrity and how the host immune system responds. The main purposes of this chapter are to briefly describe the histopathologic and pathophysiologic alterations observed with two major rickettsial infections that impact the lung, Rocky Mountain spotted fever (Rickettsia rickettsii) and human monocytic ehrlichiosis (Ehrlichia chaffeensis) and to describe the molecular basis of cellular alterations in the host and pathogen virulence mechanisms that belie the pulmonary pathology with these diseases.

Rickettsial Infections That Impact Lung Structure and Function

The order Rickettsiales is divided into two major families, Rickettsiaceae and Anaplasmataceae. The Rickettsiaceae family includes the genera Rickettsia and Orientia, obligate intracellular vasculotropic bacteria that live and propagate within the cytoplasmic compartments of endothelial cells in mammalian hosts. In contrast, genera within the family Anaplasmataceae include Ehrlichia and Anaplasma, which infect leukocytes, including those circulating in the bloodstream. Among these genera, important human infections that impact lung function and structure include the vasculotropic rickettsioses such as Rocky Mountain spotted fever (RMSF), epidemic typhus, and murine typhus, among other entities bearing geographic names. The major underlying theme of these is endothelial cell infection followed by vasculitis and increased vascular permeability.3,4 Systemically, this leads to hypotension, organ ischemia and failure, and sometimes death. In the lung, this translates into potentially significant noncardiogenic pulmonary edema that can be life threatening.5 Fundamental differences exist between spotted fever group rickettsiae, such as R. rickettsii that causes RMSF, and the typhus group rickettsiae, such as Rickettsia prowazekii and Rickettsia typhi that cause epidemic and murine typhus, respectively.5 The molecular pathogenesis of typhus group infections is less well understood; thus, this chapter focuses in part on RMSF as an example of rickettsial pneumonitis.

In contrast, the Anaplasmataceae are known to infect predominantly circulating leukocytes in mammals, and, by virtue of this host cell niche, histopathologic vasculitis is not a significant component of Ehrlichia or Anaplasma infections in humans.6 However, infections by E. chaffeensis, the cause of human monocytic ehrlichiosis, can present with a clinical picture similar to vasculitis, and this is now
believed to be due to the local or systemic release of proinflammatory vasoactive cytokines that impair endothelial integrity and lead to increased vascular permeability as observed in vasculitis. Of those Anaplasmataceae that are significant causes of human disease, E. chaffeensis is the most frequent cause of infection in which lung structure and function are impaired and thus is the other main topic of this chapter.

Rocky Mountain Spotted Fever
Clinical Disease and Pathophysiology
Rocky Mountain spotted fever is an acute febrile illness that results after transmission of R. rickettsii into a human or animal host after the bite of competent vector ticks. The infection is limited to the Western hemisphere, but infections by related spotted fever group rickettsiae are documented on every continent except Antarctica. After tick bite, the rickettsiae usually disseminate within hours to days via the blood or lymphatics. These obligate intracellular bacteria attach to host endothelial cells in which they become internalized, escape the endocytic vacuole, and propagate within the cytosol. During this process, endothelial cell functions are altered, leading to proinflammatory and procoagulant conditions that favor leukocyte infiltration, focal thrombus formation and increase in vascular permeability. Endothelial cells either release the rickettsiae into the bloodstream or the infected cell is lysed, also releasing bacteria for hematogenous spread into all organs and tissues, including the lung. In the extensive microvasculature of the lung, R. rickettsii infection may be widely spread. Host inflammatory response, usually manifest as some combination of interstitial mononuclear cell pneumonitis and edema, is observed in histopathologic preparations, leading to the occasional interstitial infiltrative pattern observed with chest x-rays in RMSF. The fact that pulmonary vasculature permeability increases at a time when multi-organ failure and hypotension are also observed sometimes leads to overly aggressive fluid therapy that can precipitate or aggravate pulmonary edema. Prompt treatment with doxycycline can arrest and reverse many clinical manifestations, indicating that much of the inflammatory process is initiated and maintained by the bacterium.

Early Events in the Rickettsia–Endothelial Cell Interaction
The molecular mechanisms by which infection of endothelial cells results in vasculitis and altered vascular permeability in the lung is an area of active study. Initially, bacteria that are inoculated into the host replicate locally and then disseminate into the lymphatics. Thereafter, the rickettsiae enter the bloodstream and interact with endothelial cells in the microvasculature of many organs including the lung. The initial rickettsia–endothelial cell interface is a receptor–ligand mediated event, dependent on rickettsial expression of outer membrane proteins A and B (OmpA and OmpB). The host cell ligand for OmpA, only found in the spotted fever group rickettsiae, is not known. However, for both the spotted fever group rickettsiae Rickettsia japonica and Rickettsia conorii, OmpB ligation occurs via binding to host cell Ku70 that is recruited to host membrane lipid microdomains. After OmpB binding, Ku70 is ubiquitinated by the protein tyrosine kinase adaptor protein Cbl, an event linked to internalization of the rickettsia-containing endosome because its inhibition blocks R. conorii entry.

Similarly critical for internalization of rickettsiae is the recruitment of Arp2/3, c-Src, and p80/85 cortactin to binding sites that leads to localized actin cytoskeletal rearrangements in part mediated by Cdc42, phosphatidylinositol-3 kinase, and the Src family of kinases. Spotted fever group rickettsiae also express RickA on one pole of the bacterium, a protein that mediates actin polymerization via Arp2/3 complex assembly, effectively creating an intracellular scaffold that allows propulsion through the host cell and occasionally through host membranes.

On entry, the endosomal membrane that contains the rickettsiae is rapidly degraded, presumably by the action of rickettsial phospholipase D or membrane hemolysin TlyC that are actively expressed during this interval. Rickettsial genomes encode an intact tricarboxylic acid cycle, but otherwise have only a limited capacity for energy generation, lacking genes for enzymes for carbohydrate, lipid, nucleotide, and amino acid metabolism. These observations and the demonstration of active adenosine triphosphate/adenosine diphosphate translocases establish the concept of rickettsiae as energy parasites. The presence of an intact pathway for a type IV secretion mechanism underscores the potential importance of transporting rickettsial proteins into the host cytosol.

Cellular and Tissue Injury
Rickettsia rickettsii infection of endothelial cells leads to membrane injury that can be antagonized by antioxidants, and this membrane injury leads to loss of cellular osmoregulation and eventually cell lysis, even in the absence of large organism loads. The degree of membrane injury in typhus group infections is much less substantial, and cytology is generally believed to be mechanical owing to the accumulation of large bacterial quantities within infected cells. Endothelial cells infected by R. rickettsii undergo a number of transcriptional changes, including upregulation...
of proinflammatory cytokines and chemokines (interleukin [IL]-1α, IL-6, IL-8, monocyte chemotactic protein 1), surface procoagulant activity and tissue factor expression, E-selectin upregulation, and release of von Willebrand factor multimers. The net result of the intracellular infection is an increased proinflammatory and procoagulant endothelial cell phenotype. These changes are mediated in part by direct rickettsial activation and nuclear mobilization of nuclear factor (NF)-κB via a mechanism involving activation of inhibitory-κB kinase α and β and phosphorylation-proteolysis of the inhibitor protein IκBα. This phenomenon is abrogated by the bacterial protein synthesis inhibitor doxycycline, implying a contribution of bacterial proteins toward NF-κB proinflammatory gene activation. The triggers for the transcriptional alterations are not completely defined but appear to involve interactions with protein kinase C isoforms, and are modulated in part by p38 mitogen-activated protein (MAP) kinase. Interestingly, this process also inhibits apoptosis, prolonging survival of infected cells, an obvious advantage for the bacterium. Intracellular rickettsial infection also yields upregulated expression of heme oxygenase 1, a host defense against oxidative injury and a critical regulator of the cyclooxygenases, including cyclooxygenase-2, that are upregulated with rickettsial infection and is a key enzyme that governs prostaglandin production, increased release of prostaglandins I2 and E2, and, indirectly, vascular tone and integrity.

The upregulated presence of E-selectin and procoagulant molecules on infected endothelial cells promotes inflammation and focal thrombosis, features considered typical of rickettsial vasculitis. Although large-vessel thrombosis is atypical for RMSF, fibrin clots are not infrequently detected as eccentrically localized lesions among vessels in which only focal infection is demonstrated (Figure 38.1). When rickettsial infection occurs within the confines of the pulmonary parenchyma, capillaries are the dominant vascular structure and support the heaviest burden of rickettsiae. As a consequence of infection in these small-caliber vessels, interstitial inflammatory cell infiltration is the dominant feature and appears as widened, hypercellular alveolar septae, some of which may be edematous; capillaries that are dispersed within the alveolar septae are often surrounded by mononuclear cells, chiefly lymphocytes and macrophages (Figure 38.2).

Figure 38.1. (A) *Rickettsia rickettsii* vasculitis with eccentric microthrombus (arrow) in pulmonary venule and diffuse interstitial pneumonitis. (Hematoxylin and eosin; original magnification, ×16.) (B) Note the intracellular distribution of infected endothelial cells along a venule as demonstrated by immunohistochemistry. (Anti-*Rickettsia rickettsii* with hematoxylin counterstain; original magnification, ×260.)
Host response to rickettsial infection is dominated by the infiltration of tissues and vessel walls by lymphocytes and macrophages. Immunophenotyping methods of rickettsial inflammatory lesions have identified a polymorphous mixture of CD4 and CD8 T lymphocytes, admixed with scattered B lymphocytes, macrophages, and occasional neutrophils. Infection by rickettsiae leads to substantial chemokine production by endothelial cells, including IL-8, monocyte chemoattractant protein 1, and fractalkine (CX3CL1), and it is likely that these signals in part recruit and retain inflammatory cells and primed immune cells that participate in the localized tissue vasculitis. As anticipated, effective antirickettsial immunity is predominantly dependent on cellular immunity, especially on expansion of adaptive immunity via CD4 and CD8 cells that produce interferon (IFN)-γ and mediate cytotoxic responses. However, recent investigations provide evidence that antibody plays a more important role than previously ascribed.

The inflammatory and immune response to the presence of rickettsiae in cells is at first heralded by expansion of natural killer cell populations, and depletion of these cells allows greater rickettsial propagation and reduced production of suppressive IFN-γ. Depletion of both CD4 and CD8 T lymphocytes also adversely impacts survival in murine models, and the most dramatic effect implicates a role for major histocompatibility complex I–mediated, perforin-dependent adaptive immune responses. The molecular mechanism of rickettsial restriction by immune cells appears to be dependent on the synergistic effects of IFN-γ, tumor necrosis factor (TNF)-α, IL-1β, and CCL5 produced from natural killer cells, CD8 T cells, and macrophages; critical effectors include both nitric oxide and hydrogen peroxide, accentuated by tryptophan starvation after enhanced host cell degradation of this amino acid essential for bacterial propagation. Interestingly, there appears to be a critical balance between beneficial and deleterious immune responses, because adoptive transfer of immune CD8 T cells into rickettsia-infected naïve animals accelerates death if introduced during early phases of infection.

In the context of RMSF lung involvement, it is likely that many of the events are simultaneously occurring, with outcome dependent on degree of pulmonary microvascular infection and compromise and the degree to which a rapid and protective immune response is induced. Fundamental studies have identified several novel targets for intervention at the level of the bacterium (inhibition of OmpB–Ku70 interaction, ...)
inhibition of type IV secretion system activity, inhibition of phospholipase D or hemolysin activity) and at the level of the host (inhibition of ubiquitination of Ku70, inhibition of induced actin cytoskeletal rearrangements or signaling via protein kinase C, p38 MAP kinase, cyclooxygenase-2, and NF-κB nuclear translocation).

Diagnosis

When involvement of the lung by RMSF becomes evident, it is usually during the course of increasing decompensation, hypotension, and multiorgan failure. Diagnosis of the infection at this interval is often too late to prevent significant morbidity, long-term sequelae, or death, prompting physicians to have a low threshold for empirical doxycycline therapy at earlier times. Rocky Mountain spotted fever is best diagnosed during the active phase of infection by skin biopsy of petechial lesions followed by immunohistochemical or in situ hybridization demonstration of R. rickettsii in the tissue. Antibodies are frequently present during active infection, but demonstration of seroconversion or a fourfold titer change in convalescence can retrospectively confirm a clinical diagnosis. Molecular diagnostic methods are less often used and generally focus on polymerase chain reaction (PCR) amplification of R. rickettsii nucleic acids from whole blood samples obtained during the active phase of infection, although this is not currently considered highly sensitive. Additional data suggest that PCR on freshly obtained skin biopsies or other tissues may also work well because the rickettsiae live predominantly within tissue-bound endothelial cells. Immunohistochemistry is often used to establish a postmortem diagnosis, and PCR methods should be excellent adjuncts to this approach.

Human Monocytic Ehrlichiosis

Clinical Disease and Pathophysiology

Human monocytic ehrlichiosis (HME) is a febrile illness with many similarities to rickettsial infections such as RMSF. Some authors have used the terminology “spotless” spotted fever to indicate the clinical and historical similarity of HME to RMSF. After tick bite, E. chaffeensis gains access to the blood and may be visualized in peripheral blood smears from some patients after an incubation period of 7–10 days. The infection has been well-characterized to occur only in North America, although increasing evidence suggests that the pathogen and infection may be worldwide in distribution.

Unlike the situation for R. rickettsii, E. chaffeensis infects almost exclusively mononuclear phagocytes in both tissues and blood. It has been detected in blood, bone marrow, lymph node, liver, spleen, and many tissues and organs that possess mononuclear phagocyte populations or acquire these cells via inflammatory cell infiltration. Presumably, E. chaffeensis infects mononuclear phagocytes at the site of tick bite or passes via lymphatics to draining lymph nodes where initial infection occurs. Once E. chaffeensis attaches to and enters the mononuclear phagocyte, it accumulates in an endosomal vacuole that is arrested in maturation at the early endosome stage. The bacteria replicate within this vacuole to form an intracytoplasmic inclusion called a morula that is occasionally visualized in peripheral blood monocytes on Romanowsky-stained blood smears. The infected cells undergo substantial alterations in function that presumably diminish innate and adaptive immune recognition and response; however, cells that manage to ingest E. chaffeensis via opsonophagocytosis generate considerable proinflammatory cytokine responses that could drive the underlying inflammatory cell infiltration and tissue necrosis observed in some cases. This response does not occur via typical lipopolysaccharide or peptidoglycan-mediated Toll-like receptor signaling because E. chaffeensis, like other Anaplasmataceae, lacks biosynthetic pathways for both of these bacterial components. The majority of clinical infections present with fever and myalgias accompanied by thrombocytopenia, leukopenia, anemia, and evidence of mild to moderate hepatic injury supported by elevated liver transaminase activities in serum.

Although E. chaffeensis has no known predilection for the respiratory system, when circulating mononuclear phagocytes become activated for proinflammatory function during passage through the pulmonary microvasculature, the result would be increased vascular permeability and inflammatory cell infiltration of the interstitial spaces—the typical interstitial pneumonitis observed with HME in severe cases. Infection can precede diffuse alveolar damage (Figure 38.3), even in the absence of large numbers of bacteria and a vigorous inflammatory cell infiltrate. In advanced stages, lung involvement can appear as macrophage-rich intraalveolar infiltrates, again absent substantial quantities of bacteria (Figure 38.4). The clinical and histopathologic sequelae of lung involvement can take days or weeks to resolve. This process often occurs in the context of systemic inflammatory response with fulminant E. chaffeensis infections in patients with preexisting immune compromise such as with human immunodeficiency virus and immune suppression for organ transplantation or for autoimmune diseases. Very often the presentation is septic-like or toxic shock–like and includes a component of acute respiratory distress syndrome. Despite clinical similarities to RMSF and vasculitis, histopathologic investigations do not provide any support for vasculitis as a component
Figure 38.3. (A) *Ehrlichia chaffeensis*–induced interstitial pneumonitis accompanied by diffuse alveolar damage. (Hematoxylin and eosin; original magnification, ×80.) (B) Ordinarily, *E. chaffeensis* is infrequently found, except in patients with underlying immunocompromise. (*Ehrlichia chaffeensis* immunohistochemistry with hematoxylin counterstain; original magnification, ×400.)

Figure 38.4. (A) *Ehrlichia chaffeensis*–induced macrophage-rich alveolar infiltrates and resolving diffuse alveolar damage in human monocytic ehrlichiosis. (Hematoxylin and eosin; original magnification, ×40.) (B) The tissue injury is usually greatly out of proportion to the bacterial load. (*Ehrlichia chaffeensis* immunohistochemistry with hematoxylin counterstain; original magnification, ×80.)
of HME. Although a rapid clinical response is often demonstrated even after 1 to 2 days of doxycycline treatment, given the mononuclear phagocyte niche, it is difficult to explain pancytopenia and hepatic or pulmonary injury based on direct bacterial injury. Most data now support a role for E. chaffeensis triggering of host proinflammatory response as a major pathogenetic feature in HME.

Early Events in the Ehrlichia–Mononuclear Phagocyte Interaction

During the initial encounter with a mononuclear phagocyte, E. chaffeensis binds to E- and L-selectins probably via the bacterial membrane glycoprotein gp120. Interestingly, there are two morphologic forms of E. chaffeensis, analogous to the situation with the Chlamydiae—a lower metabolic activity dense core form that expresses the gp120 adhesin and a more substantially metabolic reticulate form that expresses lower gp120 quantities and undergoes active binary fission. The initial internalization leads to interactions via glycosylphosphatidylinositol-anchored proteins and caveolin in host cell membrane lipid rafts that is followed by intracellular calcium fluxes and changes in tyrosine phosphorylation, activation of phospholipase Cγ2, and inositol 1,4,5-triphosphate production. The emerging parasitophorous vacuoles accumulate only early endosomal markers, including an increasing amount of transferrin receptor, a characteristic of recycling endosomes diverted from the phagosome–lysosome fusion pathway. Likewise, E. chaffeensis–infected THP-1 cells show downregulated transcription of RAB5A, SNAP23, and STX16, critical components of vesicular transport and fusogenic events.

Intracellular entry also occurs in the absence of significant proinflammatory cell activation and triggering. Although pretreatment of macrophages with IFN-γ leads to restriction of erhlichial growth, infection is associated with inhibition of IFN-γ-inducing pathways such as JAK/STAT, and induction of important cytokines for maturation of Th1 and immune responses, such as IL-12, IL-15, IL-18, Toll-like receptors 2 and 3, and CD14. The IFN-γ-mediated restriction occurs via its action in reducing expression of transferrin receptors, thereby reducing accessible free iron for bacterial growth, because E. chaffeensis lacks effective siderophores. Similar to R. rickettsii, E. chaffeensis infection inhibits apoptosis of infected cells, presumably via its action on transcription of cell cycle proteins and inhibition of NF-κB activation.

Cellular and Tissue Injury

Cytolysis of cells infected by E. chaffeensis in vitro is the usual outcome. However, most in vivo examinations demonstrate only meager quantities of bacteria, out of proportion to the degree of histopathologic injury, cytopenias, and hepatic injury in nonfulminant cases. Because no good animal model of E. chaffeensis infection exists, data extrapolated from murine models of infection by related Ehrlichia species provides additional evidence that most tissue injury results from the induction of aberrant and dysfunctional immune responses. Humans infected with E. chaffeensis have a marked expansion of CD8 T lymphocytes in lymph nodes and presumably other tissues, and this feature is associated with a high frequency of hemophagocytic macrophages, suggesting activation of macrophages as a component of the pathogenesis. Similarly, a dose- and route-dependent induction of CD8 T lymphocyte overproduction of TNF-α has been implicated as a mechanism of severe tissue injury in murine models. Infection of TNF receptor–deficient mice substantially abrogates manifestations of shock in murine models, yet depletion of TNF-α from mice does not alter shock manifestations. In contrast, at least one severe infection in a human occurred while receiving the TNF-α inhibitor etanercept, seeming to contradict the murine model data. Despite these advances, little investigation of the specific effectors of tissue injury, whether immunologic or not, has been conducted.

Host Innate and Adaptive Immune Responses to Infection

Ehrlichia chaffeensis subverts many innate immune responses via interactions with nonopsonophagocytic macrophage receptors (L-selectin or E-Selectin) and by its early downregulation of inflammation- and immune-inducing signals, receptors, and signaling pathways. Classic cellular immune pathways appear important for restriction of E. chaffeensis infection. In mice that ordinarily are not susceptible, infection persists when devoid of Toll-like receptor 4 and major histocompatibility complex II. Murine models of monocytic ehrlichiosis generally employ the related species Ehrlichia muris or an Ehrlichia species isolated from Ixodes ovatus ticks. In this model, infection and severity are decreased with low infectious doses and intradermal inoculation, and resistance to challenge depends on CD4 but not CD8 T lymphocytes or with infection of animals devoid of Fc receptors or effector pathways such as phagocyte oxidase (gp91phox knockout mice).
In the context of HME lung involvement, it is most likely that host immune response is a critical determinant of pathologic injury and outcome. The tissue injury that is disproportionate to bacterial load and the lack of any direct evidence of *Ehrlichia*-mediated cellular injury argue that the predominant pathologic force is an overly aggressive or misdirected host inflammatory or immune response triggered by active infection. Why some infections are asymptomatic yet others are fatal is not understood, although studies with mouse models are yielding important clues regarding infectious load and genetic background. If pathologic injury is driven primarily by host response, the most prudent approach as a supplement to antimicrobial treatment involves strategies to dampen overly aggressive production of proinflammatory cytokines or strategies that dampen vigorous Th1 responses culminating in excessive macrophage activation. That fulminant infection occurs with defects in T-cell immunity dictates that this approach must be carefully evaluated and implemented with great caution. Molecular tools that could interfere with *Ehrlichia*-mediated host transcriptional changes or that interfere with *Ehrlichia*-initiated signal transduction events and apoptosis delay might provide adjunctive treatments, especially among immunocompromised patients with fulminant infections.

**Diagnosis**

Approximately 20% of patients with HME demonstrate cough or other respiratory manifestations; however, significant respiratory disease is relatively infrequent, presenting as acute respiratory distress syndrome, and usually accompanied by other severe systemic manifestations such as multiorgan failure, a shock syndrome, and meningooencephalitis. Even at this late stage, a diagnosis may prevent and reverse adverse outcomes by prompting doxycycline treatment. Although examination of peripheral blood smears will identify bacterial inclusion vacuoles in circulating monocytes in less than 10% of cases, and antibodies will be present in a small minority of infected persons, approximately 60% or more will have *E. chaffeensis* DNA demonstrable in peripheral blood by PCR. Tissue examination by immunohistochemistry and in situ hybridization is useful in some cases, although these methods may lack sensitivity. Polymerase chain reaction has also been applied as a diagnostic tool for *E. chaffeensis* on tissues including lung, although no careful evaluation of this approach has been conducted.

**Conclusion**

Many current advances in understanding the molecular pathogenesis of RMSF and HME have been facilitated by the availability and improved annotations of rickettsial genomes; however, these efforts continue to be undermined by the lack of effective gene ablation methods for these pathogens. In time even this research bottleneck will be circumvented, and rickettsial organisms will release their unique secrets for the molecular and cellular perturbations that allow their intracellular survival and pathogenicity.

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