

Manuscript for

## **Challenges and opportunities in applying AI to evolutionary morphology**

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# Main Title

Challenges and opportunities in applying AI to evolutionary morphology

## Running Title

AI for evolutionary morphology

## Abstract

Artificial intelligence (AI) is poised to transform many aspects of society, and the study of evolutionary morphology is no exception. Machine learning-grade methods of AI such as Principal Component Analysis (PCA) and Cluster Analysis have been commonplace in evolutionary morphology for decades, but the last decade has seen increasing application of Deep Learning to ecology and evolutionary biology, opening up the potential to circumvent longstanding barriers to rapid, big data analysis of phenotype. Here we review the current state of AI methods available for the study of evolutionary morphology and discuss the prospectus for near-term advances in specific subfields of this research area, including the potential of new AI methods that have not yet been applied to the study of morphological evolution. We introduce the main available AI techniques, categorising them into three stages based on their order of appearance: (i) Machine Learning, (ii) Deep Learning with neural networks and (iii) the most recent advancements in large-scale models and multimodal learning. Next, we present existing AI approaches and case studies using AI for evolutionary morphology, including image capture and segmentation, feature recognition, morphometrics, phylogenetics, and biomechanics. Finally, we discuss areas where there is potential, but no current application of AI to key areas in evolutionary morphology. Combined, these advancements and potential developments have the capacity to transform the evolutionary analysis of organismal phenotype into evolutionary phenomics, launch it fully in the “Big Data” sphere, and align it with genomics and other areas of bioinformatics.

### **Keywords**

Artificial Intelligence

Phenomics

Evolutionary Morphology

Machine Learning

# 1 Introduction

2 The rapid proliferation of tools using artificial intelligence (AI) has highlighted both its immense  
3 potential and the numerous challenges its implementation faces in the biological sciences.  
4 Traditional AI methods (i.e. Machine Learning) have been widely used in biology for decades;  
5 indeed, common analytical methods such as Principal Component Analysis (PCA) and Cluster  
6 Analysis are both types of Machine Learning (ML). Deep Learning (DL) has gained significant  
7 traction since the early 2010s and is increasingly applied to biological problems, including image  
8 analysis (Akçakaya et al., 2022; Angermueller et al., 2016; Hallou et al., 2021; Li et al., 2023;  
9 Zhichao Liu et al., 2021; Moen et al., 2019; Pratapa et al., 2021; Ravindran, 2022; “What’s next  
10 for bioimage analysis?,” 2023), molecular analysis (Atz et al., 2021; Audagnotto et al., 2022;  
11 Korfmann et al., 2023; Kuhn et al., 2021; Kwon et al., 2021), and a broad range of topics in  
12 ecology and evolutionary biology (Borowiec et al., 2022; Lürig et al., 2021; Pichler and Hartig,  
13 2023).

14 One key area overlapping with many topics in evolutionary biology, is the field of evolutionary  
15 morphology, which aims to characterise and reconstruct the evolution of organismal  
16 phenotypes. The scope of evolutionary morphology is huge, encompassing pattern, process,  
17 and mechanism, from cellular to macroevolutionary levels, across the entire 3.7-billion-year  
18 history of life on Earth and, consequently, often involves massive datasets. Due to the sheer  
19 quantity of potentially informative data, some of the most significant challenges evolutionary  
20 morphologists face is the ability to collect, process and analyse this data in a reasonable time  
21 frame whilst limiting computational cost. Researchers often face a trade-off between the breadth  
22 and depth of their study, as, typically, high-resolution morphological datasets must sacrifice  
23 taxonomic, ecological or chronological coverage owing to time- and computational limitations. AI  
24 offers an unparalleled opportunity to bridge this breadth-depth gap and thus transform the field  
25 into “Big Data” science, thereby supporting the development of *evolutionary phenomics*. By  
26 making big data analysis more feasible, integrating AI into this field will ultimately allow a better  
27 understanding of the drivers and mechanisms of morphological evolution.

28 Here, we focus on the applications of AI to the study of evolutionary morphology, exploring not  
29 only existing uses but also the potential of recent AI methods that have not yet been applied to  
30 the study of morphological evolution. We introduce the main available AI techniques,  
31 categorising them into three groups based on their order of appearance: (i) Machine Learning,  
32 (ii) Deep Learning with Neural Networks, and (iii) Recent advancements from Transformers to  
33 large-scale models. Next, we present existing AI approaches in the order of a common lifecycle  
34 of evolutionary morphological studies: (i) Data Acquisition, (ii) Image Data Processing, (iii)  
35 Phenomics, (iv) Evolutionary applications. We also focus on six case studies in which AI can  
36 benefit evolutionary morphological studies. Finally, we discuss areas where there is potential  
37 but no current application of AI to key areas in evolutionary morphology.

38

## 39 Evolution of AI methods

40 Here, we outline the major stages in the evolution of AI relevant to the study of evolutionary  
41 morphology. We categorise them into three imperfect groupings based on their order of  
42 appearance: (i) Machine Learning, (ii) Deep Learning with Neural Networks, and (iii) Recent  
43 advancements from Transformers to large-scale models.

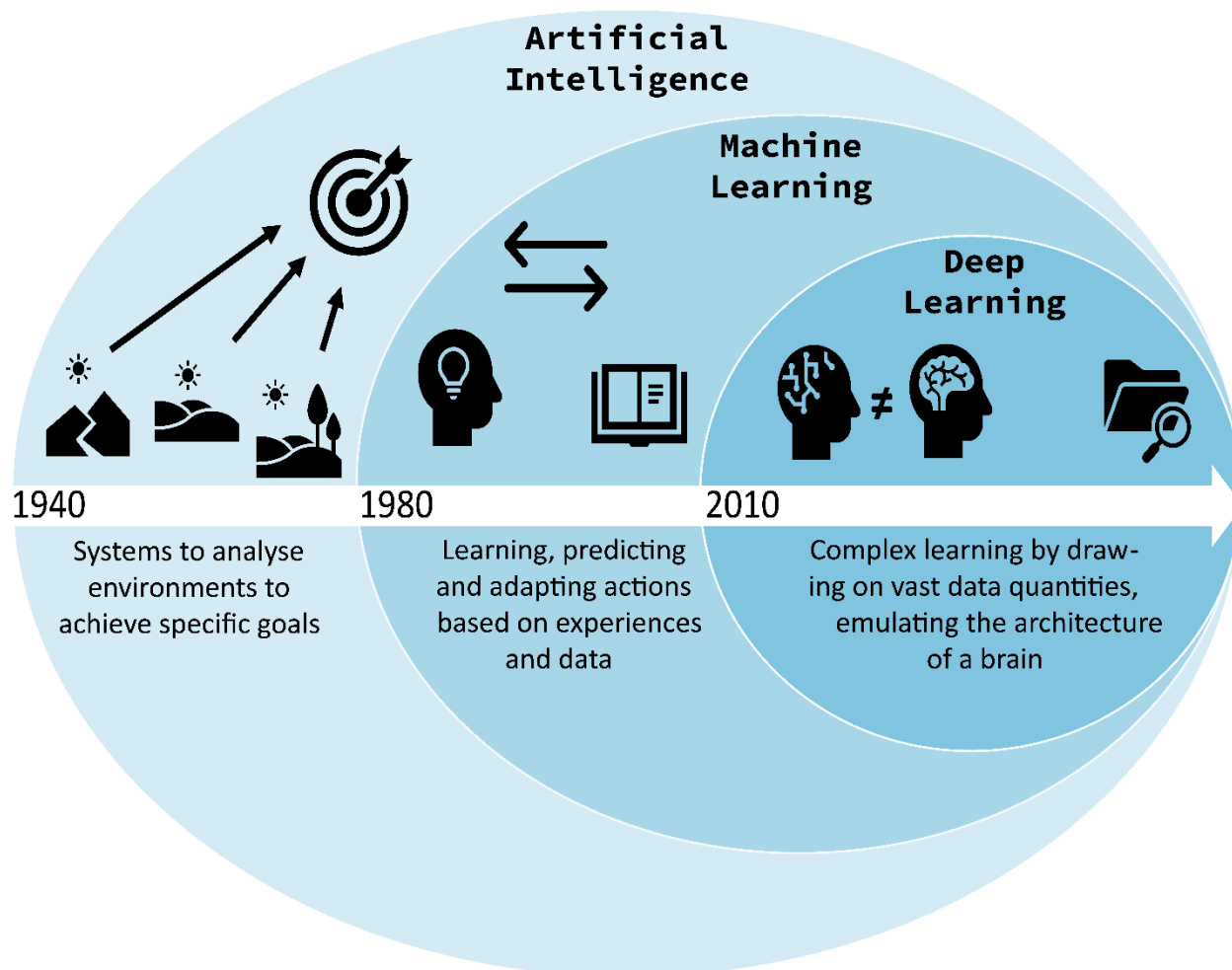
44 We begin by providing the key definitions necessary for a base level understanding of this  
45 review. These primarily centre on the nested relationships of AI, ML, and DL (Figure 1), but also  
46 include the adjacent and overlapping field of computer vision. Because AI applications for  
47 evolutionary morphology primarily involve the analysis of images or text, computer vision is  
48 often an integral part of AI applications to evolutionary morphology, including most of those  
49 discussed here. However, it is worth noting that computer vision is not limited to AI but also  
50 present in numerous applications for image data that do not involve AI (Samoili et al., 2020).  
51 Further methodological definitions are provided where required in the main text.

52 **Artificial intelligence**, or AI, concerns intelligent machines capable of mimicking human-like  
53 cognitive functions. It is, however, particularly challenging to specifically define AI as its scope is  
54 extremely broad. The European AI strategy (European Commission, 2018) provides a definition  
55 as follows: "Artificial Intelligence refers to systems that display intelligent behaviour by analysing  
56 their environment and taking action — with some degree of autonomy — to achieve specific  
57 goals", leaving the interpretation of *intelligent behaviour* open to the reader. Russel and Norvig  
58 (2021) try to provide a more operative definition of AI, as a system that can either 'reason' or act  
59 human-like, or reason or act rationally.

60 **Machine learning**, or ML, is a subset of AI, and can be defined as "the ability of systems to  
61 automatically learn, decide, predict, adapt, and react to changes, improving from experience  
62 and data, without being explicitly programmed" (Amalfitano et al., 2024).

63 **Deep learning**, or DL, is, in turn, a subset of ML wherein learning is achieved through complex  
64 neural networks designed to simulate the cognitive architecture of the brain. Fine-grained tasks  
65 on complex data can be achieved using vast amounts of data and with limited human  
66 intervention.

67 **Computer vision** is a multidisciplinary field of computer science that enables machines to  
68 interpret, analyse, and understand visual information from the world, mimicking human vision  
69 capabilities through image and video processing algorithms. It refers to using computers for  
70 object-class recognition, where objects or individuals can be identified in 2D and 3D digital  
71 media. While many applications of computer vision for evolutionary morphology involve AI, it is  
72 not limited to AI and is applied in diverse fields.



73  
 74 Figure 1: Broad definitions, relationships, and differences between artificial intelligence (AI),  
 75 Machine Learning (ML) and Deep Learning (DL), the sequential development of each  
 76 successive subset, and their broad introductions over time (Carbonell et al., 1983; Goodfellow et  
 77 al., 2016).

## 78 Machine Learning in Computer Vision

79 Classical (prior to DL) computer vision pipelines were composed of two separate computational  
 80 steps. The first involved the extraction of local or global characteristics (features) that were  
 81 deemed useful for a task from images. This meant that, for example, the borders and edges of  
 82 an image needed to be identified, and subsequently, an object could be detected based on the  
 83 edges, as in the active contours (Kass et al., 1988) and level sets methods (Chan and Vese,  
 84 1999; Osher and Sethian, 1988). The extracted features were then used as inputs to ML  
 85 algorithms that were optimised for structured data, e.g. tabular data.

86 Subsequent efforts were then devoted to the design of methods to extract relevant features, i.e.  
 87 features that were able to capture the relevant structures within an image, such as Haar  
 88 features (Papageorgiou et al., 1998), Scale-Invariant Feature Transform (SIFT) (Lowe, 2004),

89 Histogram of Oriented Gradients (HOG) (Dalal and Triggs, 2005) Fisher kernels (Perronnin et  
90 al., 2010; Perronnin and Dance, 2007), and curvelets (Candès et al., 2006). These engineered  
91 (or hand-crafted, or heuristic) features were then often used as inputs for ML methods, which  
92 can be broadly classified into the following approaches: predictive methods, classification,  
93 clustering, and dimension reduction (Breiman, 2001; Cortes and Vapnik, 1995; Jolliffe and  
94 Cadima, 2016; Lloyd, 1982). Although DL architectures and convolutional neural networks  
95 (CNNs) had already been proposed in the early 1990s (LeCun et al., 1989), their success was  
96 limited due to a lack of computational power and the availability of large datasets needed to fully  
97 exploit their capabilities. However, there were some attempts to design ML systems that could  
98 learn the extraction of optimal linear features for the downstream task (classification, detection,  
99 clustering, reduction) within a boosting framework (Vedaldi et al., 2007).

## 100 Deep Learning

101 Although artificial neurons (McCulloch and Pitts, 1943) and then artificial neural networks were  
102 introduced several decades ago (Rosenblatt, 1958), they were often outperformed by other  
103 methods, especially ensembles of decision trees like Random Forests (Breiman, 2001) or  
104 boosted trees (Chen and Guestrin, 2016) across a variety of tasks. This failure was mainly due  
105 to the difficulty in training fully connected networks (networks in which the neurons of each layer  
106 are connected to all neurons in the following layer) with more than few layers. Even when  
107 shared-weights approaches and CNNs were introduced (Fukushima, 1980; LeCun et al., 1989),  
108 they remained on the fringe of the computer vision community, with the primary bottlenecks  
109 being the computational power required to build networks with multiple layers and the amount of  
110 data needed to train such systems.

111 As the availability of data and the performance of computer hardware improved, especially with  
112 the advent of graphics processing units (GPUs), deep CNNs rose to prominence in the field of  
113 computer vision. The year 2012 represents a key turning point, when a deep CNN achieved the  
114 best result in the ImageNet Large Scale Visual Recognition Challenge (classifying millions of  
115 images into 1000 classes) (Krizhevsky et al., 2012). Ever since, computer vision tasks have  
116 been dominated by solutions using deep artificial neural networks, to the extent that learning  
117 with deep neural networks (DL) is now generally referred to as AI, a name formerly used only for  
118 methods trying to solve general intelligence tasks, rather than specific tasks. In recent years, DL  
119 has undergone significant expansion into diverse domains, demonstrating its adaptability and  
120 offering promising solutions to challenges in various fields such as physics, medicine, and even  
121 gaming (Poon et al., 2023; Raissi et al., 2019; Shallue and Vanderburg, 2018; Silver et al.,  
122 2016).

123 Around the same time, neural network-based methods such as recurrent neural network (RNN)  
124 (Graves et al., 2013) and Long-Short-Term-Memory (LSTM) (Hochreiter and Schmidhuber,  
125 1996) have been applied to sequential data, and have shown great results for handling text and  
126 time series data. These methods have then been widely used in natural language processing  
127 (NLP) tasks.

128 The difficulty of gathering a big enough dataset to fully train a DL model for a specific task can  
129 be mitigated by the assumption that many low-level features learned by large models are  
130 generally enough for most tasks. Under this assumption, the features learnt for a task can also  
131 be used (transferred) in a different task. A technique frequently used in DL is the use of pre-  
132 trained models that are then fine-tuned (the entire model adapts to the new task) or used for  
133 transfer learning (only the final layers of the models are trained). Using pre-trained models  
134 reduces the need for large datasets, often improves model performance, and saves training  
135 time and resources. A common example is the use of models pre-trained with the ImageNet  
136 dataset for downstream tasks (Chen et al., 2017; Ren et al., 2016), such as in Sun *et al.* (2018),  
137 where the ImageNet-based model was used for object detection from underwater videos in  
138 marine ecology.

## 139 Transformer, large-scale AI models, and Multimodal Learning

140 In 2017, a model architecture known as the Transformer was developed to address many NLP  
141 tasks, such as translation (Vaswani et al., 2017; Vydana et al., 2021). Transformer uses a self-  
142 attention mechanism, allowing each token (i.e., words, phrases, sentences, etc.) to interact with  
143 other tokens during training. Transformer can handle more information than RNNs and LSTM,  
144 can analyse contextual information, and is also better at parallelisation. Since Transformer's  
145 introduction, it has become the state-of-the-art for many NLP tasks (Ahmed et al., 2017; Baevski  
146 and Auli, 2019).

147 By 2020, most vision models were using CNN-based methods. Transformer has started being  
148 implemented as the backbone architecture for vision models (Dosovitskiy et al., 2021; Ze Liu et  
149 al., 2021). A common method is to divide an image into patches, which are treated as  
150 sequential inputs similar to tokens in NLP tasks. When Transformer is applied, models can  
151 recognise patterns and relationships between different parts of the image.

152 Research has shown that having large and diverse datasets allows models to generalise well  
153 and perform more accurately (Goodfellow et al., 2016; Russakovsky et al., 2015). Supervised  
154 learning is a common learning strategy that requires all training data to be manually labelled.  
155 However, gathering a large amount of labelled data is extremely labour-intensive. Different  
156 training strategies are applied to tackle this problem (Figure 2). Semi-supervised learning uses  
157 both labelled and unlabelled data for training (Zhu and Goldberg, 2022). Weakly-supervised  
158 learning uses less accurately labelled data for training (Lin et al., 2016). Self-supervised  
159 learning only uses unlabelled data. These strategies allow DL models to leverage as much data  
160 as possible without the need for extensive manual work.

161 Self-supervised learning has been widely used in NLP studies. One example uses parts of  
162 sentences as input data to predict entire sentences, thereby allowing all the unlabelled text to be  
163 considered as training data (Devlin et al., 2019). Models trained with masked sentences can be  
164 used as powerful pre-trained models for fine-tuning downstream tasks. With access to more  
165 training data and larger model architectures, generative models like the Generative Pre-trained  
166 Transformer (GPT) family were developed (Brown et al., 2020; Radford et al., 2019, 2018).  
167 Recent GPT models (e.g., GPT-3.5 and GPT-4) are capable of performing exceptionally well on



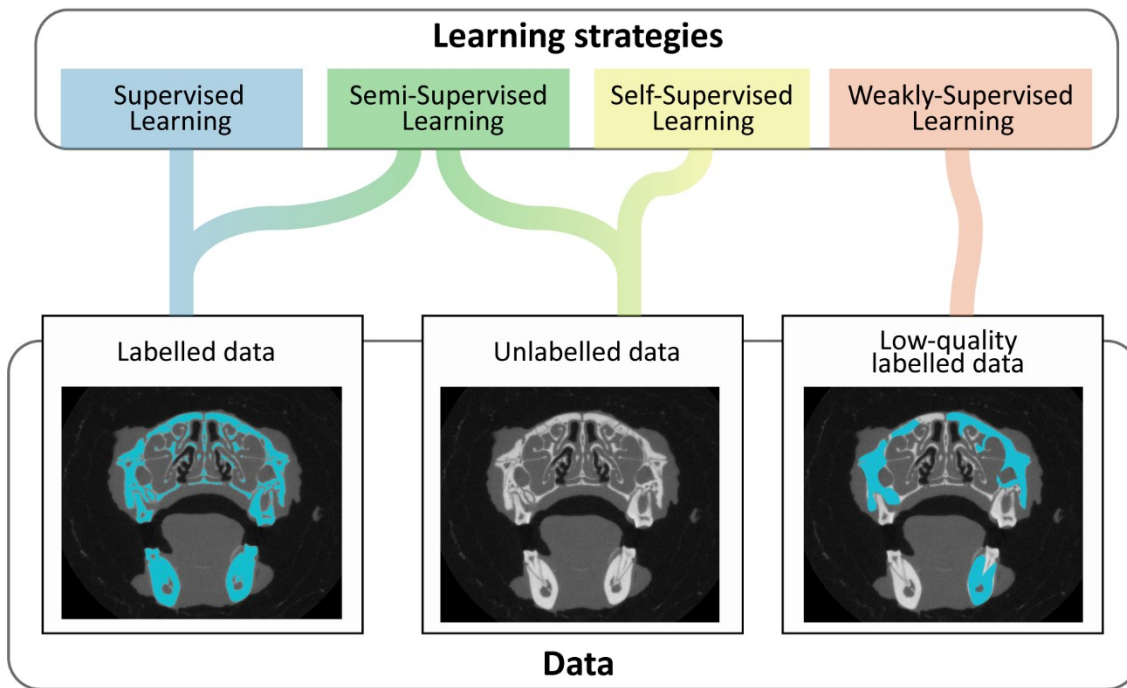
168 many NLP tasks, even when doing zero-shot (no training needed for new tasks) or few-shot  
169 (only a few training samples needed) learning.

170 Contrastive learning is one of the self-supervised learning strategies that is widely used in  
171 computer vision (Oord et al., 2019; Wu et al., 2018). The idea of contrastive learning is to train a  
172 model to map similar instances (e.g., a different view of the same image) close together, while  
173 mapping dissimilar images farther apart in the feature space. Although different ways have been  
174 designed to map similar/dissimilar instances (Chen et al., 2020; He et al., 2020), the  
175 fundamental concept remains the same. As a result, contrastive learning enables models to  
176 capture intricate visual patterns and semantics from data without the need for labelled data,  
177 thereby improving performance on downstream tasks. Later, masked images (where parts of  
178 images are obscured) have been used to predict original images and have been shown to  
179 achieve promising results (He et al., 2021).

180 These learning strategies have opened new avenues for training models, which enable the  
181 training of large models using unlabelled or a small set of labelled data, which is particularly  
182 applicable to biological sciences given the wealth of data available in natural history collections.  
183 Additionally, AI has been successfully applied to process various data modalities, including text,  
184 images, and videos. Multimodal learning can be implemented by combining features extracted  
185 from different data modalities into one feature space. Multimodal learning enables tasks such as  
186 generating images with text descriptions or generating descriptions for images (Radford et al.,  
187 2021). With more data available (e.g., through self-supervised learning) and the advancement of  
188 AI models (e.g., Transformer), the field of multimodal learning is rapidly evolving. In evolutionary  
189 morphology, multimodal learning can effectively process diverse data modalities, such as  
190 photographs, micro-computed tomography (micro-CT) scans, and 3D mesh models (Figure 3).

191

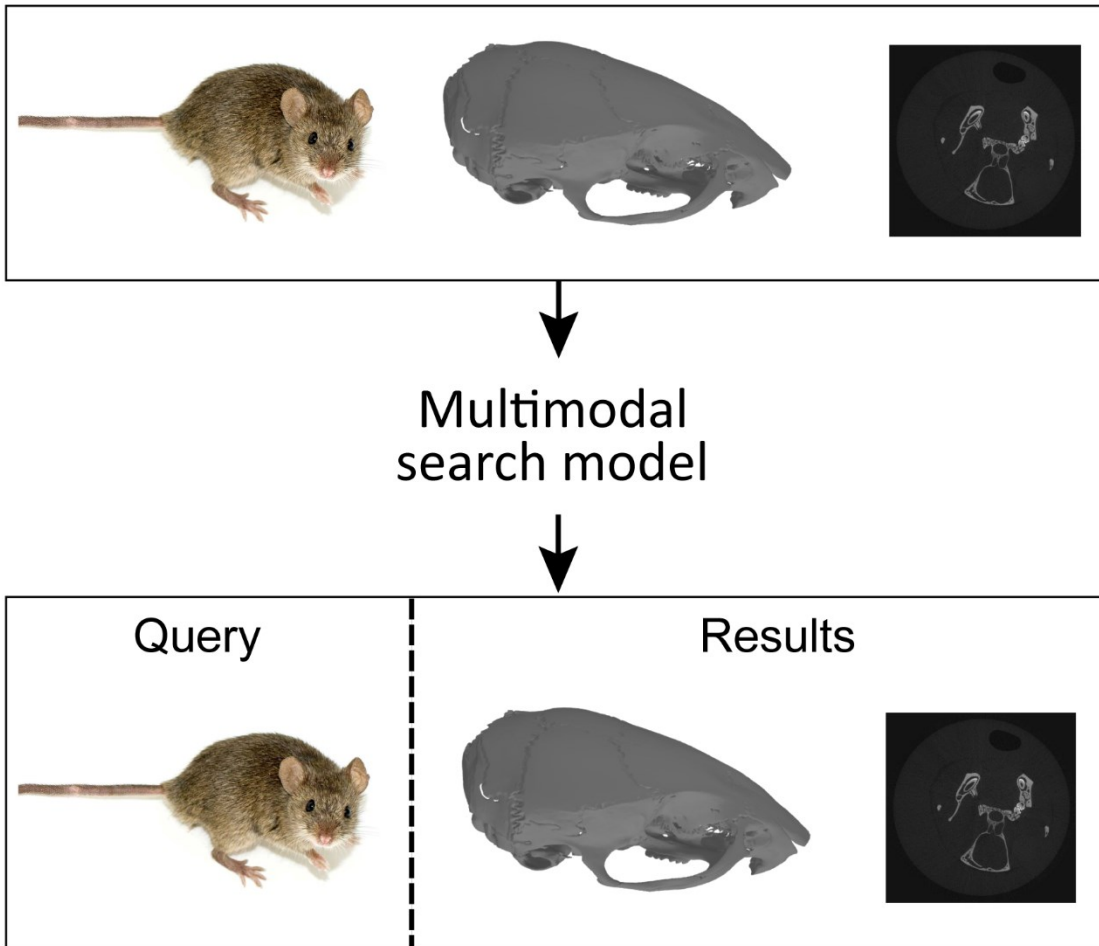
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193

194 Figure 2: An overview of existing learning strategies and the levels of labelling used in these  
 195 strategies.

## Different input data modalities



196

197 Figure 3: An example of a multimodal search. By inputting a photograph, a multimodal search  
198 model will find the mesh models and Micro-CT scans that share similar features with the input  
199 photograph.

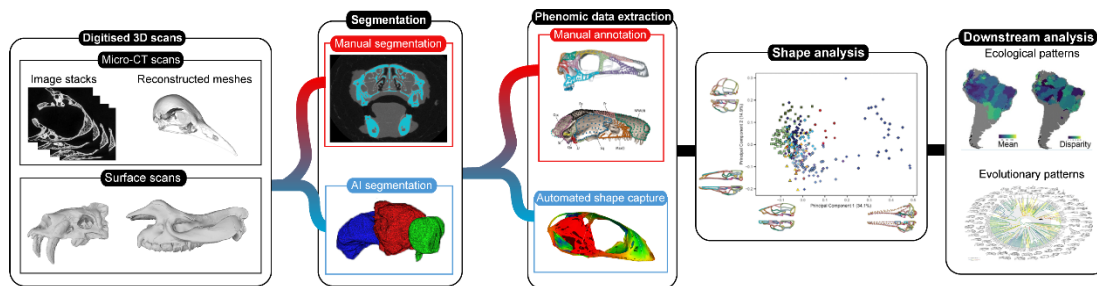
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201 Here, we have only briefly reviewed three major stages in the development of AI. A full review is  
202 beyond the scope of this paper, and there are numerous other subfields of AI not explicitly  
203 reviewed in this section, such as robotics and graph neural networks. Nonetheless, these  
204 methods hold substantial potential for the study of evolutionary morphology and, where  
205 appropriate, will be noted in the subsequent sections focused on current usage and future  
206 applications in this field.

## 207 AI for Evolutionary Morphology

208 In this next section, we pivot towards a goal-oriented review and prospectus of applications of AI  
209 in evolutionary morphology, with accompanying case studies. We present the overview of  
210 currently available AI tools for evolutionary morphology studies in four sections: Data  
211 Acquisition, Image Data Processing, Phenomics, and Applications to Research in Evolutionary  
212 Morphology. We introduce these methods with a schematic of generalised AI workflows (Figure  
213 4) which are expanded up in the sections that follow.

214



215

216 Figure 4: Schematic of a common workflow using manual and AI approaches for evolutionary  
217 morphological analysis involving 3D images. Manually annotated caecilian and theropod skulls  
218 from Bardua et al. (2019) and Felice et al. (2020), Shape information and evolutionary patterns  
219 figures from Goswami et al. (2022). Ecological analysis figure from Foister and Felice (2021)

## 220 Data Acquisition

221 The first step of acquiring data is to collect the relevant samples which are to be used in the  
222 subsequent investigation in an appropriate and ethical way. For analysis of evolutionary  
223 morphology this includes not only obtaining the data that is being measured but also the  
224 corresponding metadata such as details about museum collections. The suitability, quality, and  
225 quantity of data are of critical importance to the development and implementation of AI models.  
226 Data should be diverse and clean; fulfilling these requirements can make a larger difference  
227 than model choice, and without data that conform to these requirements, good models will  
228 perform badly (Whang et al., 2023). The diversity of data refers to including enough examples of  
229 each class of interest. Cleaning data is the process of minimising error from training datasets.  
230 Preprocessing a dataset increases the suitability of the data for training and can include contrast  
231 enhancement, noise reduction and masking, where a portion of the image is designated for  
232 further analysis (Lürig et al., 2021). Determining how much data is enough depends on the  
233 specific problem at hand. Scarce data can be expanded using existing databases or by  
234 employing pre-trained networks for transfer learning (Sharif Razavian et al., 2014). However, DL  
235 models can be successful on small training sets. Few-shot learning is a form of transfer learning  
236 that uses training data where 1-20 examples of each class are available (Y. Wang et al., 2021).  
237 Scarce data for a small number of classes is commonly referred to as the long-tail problem.  
238 Where there is imbalance between the presence of classes in the dataset, the model may find it

239 difficult to discriminate the scarcely represented classes and perform unreliably (Schneider et  
240 al., 2020).

241 Data scarcity and imbalance can be improved by additional data collection, or artificial data  
242 expansion, e.g. augmentation. Alternatively, imbalance can be tackled by explicitly accounting  
243 for biases in the training algorithm (Buda et al., 2018). Augmentation effectively increases the  
244 size of the training set without new data collection, by distorting images to create 'new' images  
245 from the existing data. This can be achieved by rotating, mirroring, scaling or by altering the  
246 pixel values (Shorten and Khoshgoftaar, 2019). This process must be controlled with the aim of  
247 the model in mind. For example, for planktonic foraminifera, the chirality of a species can be  
248 important in species classification, meaning augmentation by mirroring distorts the labelled  
249 image into a facsimile of a different species (Hsiang et al., 2019).

250

## 251 Identifying and cataloguing specimen data

252 Many, perhaps even most, studies of evolutionary morphology are based primarily on data  
253 housed within museum collections. However, museum collections are rarely fully catalogued  
254 and even then it is difficult to search for a specific specimen or representatives of specific  
255 groups. This difficulty is because data is often inconsistent in quality and structure, particularly in  
256 large collections (Dutia and Stack, 2021). AI can play a key role in this, particularly when it  
257 comes to tasks of identifying, cataloguing, and locating specimens within collections. Some of  
258 the key challenges to solve within that topic include recognising species and extracting  
259 taxonomic and metadata to enable effective searches.

260 DL has recently been applied to many types of biological specimens and collections (e.g. Soltis  
261 et al., 2020). These methods have been developed and applied extensively for recognising  
262 species, metadata, traits, and even life history stages of digitised specimens (Case Study 1).  
263 This is most established in the botanical sciences, where flat herbarium sheets are easily  
264 digitised in large numbers, likely due to their relative ease of digitisation. In some instances,  
265 albeit to a lesser degree, species identification methods have also been applied to digitised  
266 photographs of animal collections (e.g., Ling et al 2023; Macleod 2017). Applications to species  
267 identification of both plants and animals from photographs have been greatly enhanced by  
268 citizen science, resulting in useful online tools such as iNaturalist and PI@ntNet (Goëau et al.,  
269 2013; Unger et al., 2021). CNN algorithms have borne promising results and can correctly  
270 distinguish morphologically similar species (Feng et al., 2021; Hollister et al., 2023). Other  
271 machine-learning methods, such as those described by Wilson et al. (2023), have also been  
272 applied to rescaling and increasing the quality of, and extracting metadata from, images of  
273 museum specimens, allowing for automatic feeding of this information into databases.

274 Beyond images of the specimens themselves, AI approaches to capturing information of  
275 specimen labels is a critical aspect of cataloguing specimens and making key data searchable.  
276 Case Study 1b outlines the approach by which ML can be used to identify labels and transcribe  
277 them for databases, saving vast amounts of manual effort. Together, species identification and  
278 taxonomic and meta-data extraction methods from images represent a powerful tool for  
279 unlocking the full potential of natural history collections. These approaches can make data more

280 discoverable and usable for documenting biodiversity both in collections and in the field  
281 (Karnani et al., 2022; Schuettpelez et al., 2017; Wäldchen and Mäder, 2018; White et al., 2020).

282 Information on specimens is not limited to museum catalogues, but is also available in the  
283 wealth of scientific publications detailing and imaging specimens for varied purposes. However,  
284 extracting taxonomic data from the literature to describe or identify living and fossil species is a  
285 time-consuming task. Often it is also difficult to find the first appearance of a species name and  
286 correctly identify all synonyms for a taxon, as well as accounting for more recent taxonomic  
287 reclassifications. Recently, a few research groups have attempted to tackle this problem using  
288 ML, with both NLP and other Deep Neural Network (DNN) algorithms having been successfully  
289 applied to extract scientific terms and taxonomic names from scientific articles. This is a  
290 relatively new application of ML and more work is required to train models on a variety of  
291 sources, including articles in different languages and historic publications (Le Guillarme and  
292 Thuiller, 2022).

293 Once these data are captured, we need effective tools for searching for connected specimens.  
294 ML has not yet been adopted on a large enough scale to allow searching global natural history  
295 collections and connecting specimens. Dutia and Stack (2021) recommend 'Heritage  
296 Connector', a framework and software for using ML to allow better connecting specimens in  
297 collections and publications. This software achieved a precision score of greater than 85% with  
298 science museum group records. If refined or applied on a wider scale to natural history  
299 collections, it will certainly ease access to the vast specimen data available in global collections.

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301

## 302 Case Study 1: Machine Learning within Museum Digitisation and data 303 collection

304 The digitisation of museum specimens is vital for the future of collections, and their datasets  
305 undoubtedly play a significant role in scientific research in many fields, such as evolutionary  
306 morphology. In recent years, institutions have increasingly begun to incorporate recent  
307 technologies and recent ML tools within their digitisation pipelines. These implementations have  
308 led to a range of advances from speeding up digitisation processes, enabling the digitisation of  
309 items that were once difficult to digitise, to unlocking novel data from post-processing digitised  
310 items.

### 311 **Example 1a: Machine Learning & Robotics for Specimen Digitisation**

312 At its most basic definition, digitisation involves the creation of digital objects from physical  
313 items, and, within museums, this is often attributed to the photographing, scanning, or filming of  
314 physical specimens. However, traditional ways of digitising artefacts, such as digitising each  
315 specimen individually, can undoubtedly be invasive to the specimen, highly time-consuming and  
316 not very cost effective. This has led to a series of innovations that can help advance museum  
317 digitisation, from drawer scanning (Schmidt et al., 2012), which enables multiple specimens to  
318 be digitised at once, to special rotating platforms that, when combined with photogrammetry  
319 techniques allow for the 3D scanning of specimens, whilst avoiding the use of more expensive

320 or time-consuming scanning techniques (Medina et al., 2020). ML can lend a hand to these  
321 innovations to advance digitisation even more, such as the use of computer vision techniques  
322 and CNNs to segment individual specimens from whole-drawer scans (Blagoderov et al., 2012;  
323 Hansen et al., 2020; Hudson et al., 2015).

324 Another technological advancement that can aid digitisation is robotics. Robots are indeed  
325 already in use in other sectors such as book scanning at libraries (Dumiak, 2008). Though  
326 usually highly expensive, prices of robotic arms have been decreasing, and one can now  
327 purchase a robotic arm for less than £20,000 (Stanford University, 2022). This has enabled  
328 digitisation teams within museums such as the Natural History Museum, London, to start  
329 exploring robotics for digitisation research (Scott et al., 2023). Here, the goal is to have a  
330 collaborative robot (cobot) aid a digitiser in the mass digitisation of certain specimens (Figure 5).  
331 By implementing CNN algorithms and/or turning to reinforcement learning (RL), a robotic arm  
332 can lead to a pipeline that can enable digitisation teams to mass digitise multitudes of  
333 specimens, even possibly overnight, hence revolutionising museum digitisation work.

334

335



336

337 Figure 5: A Techman 500 robotic arm in action at the Natural History Museum, London, placing  
338 down a sample pinned specimen from a Lepidoptera collection. Here, the robotic arm has been  
339 trained to locate the specimen from the drawer, and then pick it up and place it on a board in  
340 order to scan the specimen.

341

342

### 343 **Example 1b: Label Extraction within Digitisation Pipelines**

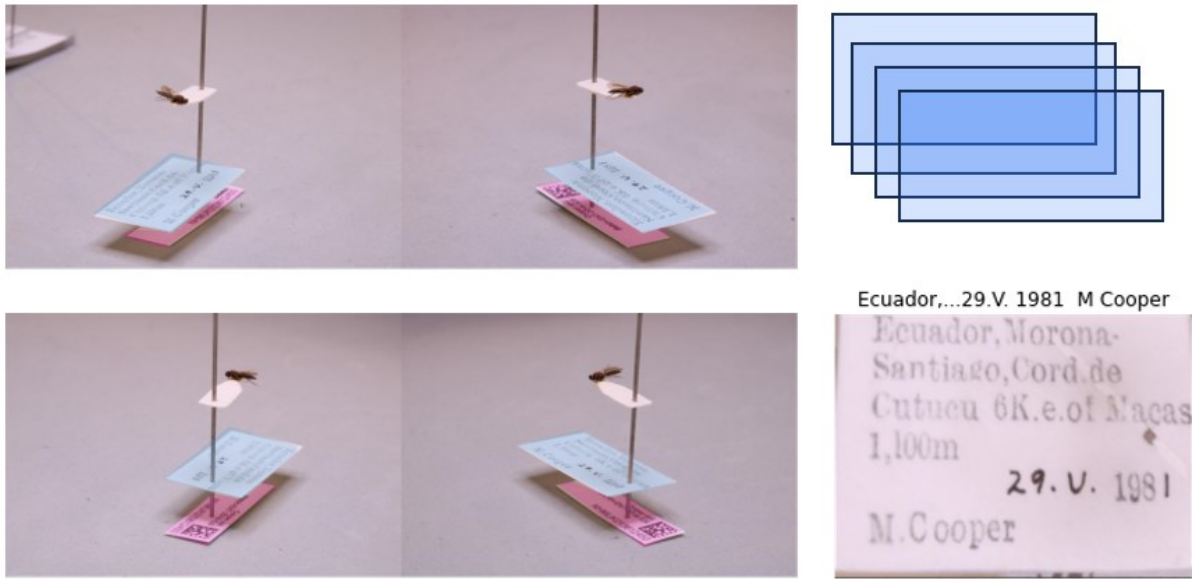
344 There is a wealth of data contained within or alongside museum specimens. Specimen labels  
345 are a good example of an attribute that is often just as vital in digitisation as the specimen itself.  
346 ML tools along with the latest digitisation innovations, have allowed for the development of  
347 techniques that enable digitisers to automatically extract information from labels whilst digitising  
348 specimens. For example, a cost-effective and efficient pinned insect digitisation process was  
349 introduced by Price et al. (2018), which involved placing the specimen within a light box and  
350 capturing a handful of photographs simultaneously with multiple cameras from varying angles.  
351 The framework described there and in Salili-James et al. (2022b) shows how one can turn to ML  
352 to merge labels together from the differently angled images in order to obtain clean,  
353 unobstructed images of labels and hence automatically extract textual information from them for  
354 digitisation purposes (Figure 6). The first step in this process is reliant on DL tools such as  
355 CNNs to locate labels from the multiple images of the specimen. Next, various mathematical  
356 and computer vision tools are used to *stitch* the found labels together, in order to have one clear  
357 image of each label. These labels can then be fed into an Optical Character Recognition (OCR)  
358 and then an NLP algorithm to transcribe the text and to automatically obtain trait information.  
359 This leads to a streamlined, automated pipeline to extract label information that helps speed up  
360 digitisation efforts.

361 In general, ML allows for trait extraction to be more easily embedded within digitisation  
362 pipelines. One area where this is proving highly effective is in automatic trait extraction from  
363 digitised herbarium specimens (Walker et al., 2022), with pilot studies have shown promising  
364 results on different types of plants. For example, in LeafMachine (Weaver et al., 2020), a CNN  
365 algorithm was trained to measure leaf area and perimeter from low-quality images, with a  
366 success rate of 60%. In another study, a different CNN algorithm (ResNet50) was shown to be  
367 capable of discriminating between growth shoot and vegetative structures in tropical plants from  
368 French Guyana (Goëau et al., 2022). While this study showed a high false positive rate of 20%  
369 when identifying growth shoots, it performed well given the complexity and variability of these  
370 structures. Overall, these methods have been shown to be able to quickly identify important  
371 ecological and evolutionary parameters from herbarium specimens, while still holding a large  
372 potential for improvement by expanding the training dataset and refining the algorithms.

373 As well as the actual plant specimen, herbarium sheets can contain multitudes of data including  
374 textual information about the specimen such as location, collector, date, and morphological and  
375 colour information if scale and colour bars are included. Text data extraction in particular can be  
376 very helpful for digitisation, as the information is embedded with the photograph when digitised  
377 onto the database - and this is often done by a digitiser performing manual transcriptions. ML  
378 methods can now be used to help speed up the digitisation process of herbarium sheets, for  
379 example, by using a combination of different models to automatically extract and categorise  
380 textual information during the digitisation process. Another example of ML related to herbarium  
381 sheet digitisation involves knowledge graphs. Knowledge graphs (KGs) are an exciting tool in  
382 DL that broadly enable a representation of data structured in a graph, with interlinking entities.  
383 This allows users to define relationships between different items in datasets. Furthermore,



384 knowledge graphs can then be used to form knowledge bases which can help model large  
385 datasets and hopefully one day allow for the creation of a planetary knowledge base (Gu et al.,  
386 2023). Beginning with datasets of herbarium sheets, one can build on knowledge graphs (Gu et  
387 al., 2022) and create a knowledge base as seen in Gu *et al.* (2023) that can help the digitisation  
388 of Herbarium sheets from filling-in missing textual data and to automating transcription tasks.  
389



390  
391 Figure 6: An example of the workflow described in Salili-James *et al.* (2022b). With the ALICE  
392 setup introduced in Price *et al.* (2018), the algorithm uses a CNN model to segment all labels  
393 found on each of the four images of the specimen. For each label, it then merges the four layers  
394 together in order to have one version of each label, which can be fed into an automatic  
395 transcription algorithm (with OCR tools). On the bottom right we see an example of a merged  
396 label, with a sample of the automatically transcribed text above it.

397

398

## 399 Image & scan data collection

400 While we refer to the use of images for specimen cataloguing above, here we focus on the  
401 details of image data collection and analysis. The use of images is central to the study of  
402 evolutionary morphology, from simple drawings and photographs to 3D computed tomography  
403 (CT) scans (Cunningham et al., 2014). The ability to generate high-resolution images has  
404 increased exponentially in recent years, particularly with initiatives for mass-scanning of  
405 collections and databases for open sharing of image data (e.g. Phenome10K, Goswami, 2015;  
406 Morphosource, Boyer et al., 2016; and DigiMorph, Rowe, 2002). Two-dimensional digitisation of  
407 collections often involves photographing collections (i.e., specimens, drawers, etc.), to create  
408 digital copies of the data. These photographic images can then undergo segmentation or region

409 identification and extraction, where specific components are identified and separated from the  
410 image for further processing or evaluation.

411 Present-day efforts to digitise specimens with two-dimensional images for large-scale data  
412 acquisition and utilisation often involve some automated processes, which can streamline both  
413 digitisation and the interpretation of data overall. Recent studies (Salili-James et al., 2022b;  
414 Scott and Livermore, 2021) describe software that uses ML models to identify regions of interest  
415 in two-dimensional images. Once trained, ML and DL software can capture photographs,  
416 segment regions of interest (ROIs), and complete other tasks for large collections datasets. This  
417 streamlines the overall acquisition and processing of digital data. Over time, ML software  
418 becomes more accurate as it learns through training datasets. This means that efficiency and  
419 accuracy can increase as the software is exposed to more data.

420 The use of automated robotics for digitisation and high-throughput data collection has  
421 historically been applied to two-dimensional methods such as photography (e.g., Case Study 1).  
422 Three-dimensional data, such as micro-CT data, can also be collected with new robotic  
423 technologies like autoloaders (Rau et al., 2021). Autoloaders allow users to set up multiple  
424 specimens for micro-CT and synchrotron scanning, set distinct parameters for each scan, and  
425 subsequently run the autoloader without supervision. The autoloader processes specimens in a  
426 queue, pulling each from the stand using a robotic arm, and setting up distinct parameters for  
427 each (Rau et al., 2021). This fully-automated process results in greater efficiency of acquisition,  
428 as the number of specimens digitised via this method increases when digitisation can occur  
429 without technician supervision. Whilst use of robotic technology to digitise collections could  
430 greatly increase the efficiency of image collection, the improvements are more than mechanical.  
431 Robots can learn behaviours through Reinforcement Learning (trial and error, as well as  
432 rewarding and/or punishing). By interacting with the environment (e.g., the digitisation room),  
433 robots can learn optimal actions that maximise rewards (e.g., successfully imaging a specimen).

434 Novel and potentially more efficient scanning methods are continuously emerging. For instance,  
435 Neural Radiance Fields (NeRF) is a fully-connected neural network that can generate a 3D scan  
436 of an object by inputting photos of it from different viewpoints (Martin-Brualla et al., 2021).  
437 Compared with traditional photogrammetry and CT-scanning, this method is able to compute  
438 three-dimensional scans based only on sparse images (Yu et al., 2021). While the resolution  
439 and accuracy are typically inferior to a full 3D scan, it can make 3D data capture more  
440 accessible and faster for some objects (e.g., extremely large specimens).

## 441 Image Data Processing

442 Image data capture has become increasingly available in recent years, with large programmes  
443 focused on mass scanning of natural history collections (Hedrick et al., 2020). The bottleneck  
444 has now shifted to processing images in order to obtain usable data on phenotype. Here, we  
445 focus on the two major aspects of image data processing: feature extraction and element  
446 isolation, and segmentation.

## 447 Extracting features and isolating elements

448 Image segmentation refers to dividing an image into meaningful areas or objects and extracting  
449 ROIs, allowing for targeted analysis and understanding of visual content (Yu et al., 2023).  
450 Segmentation facilitates numerous computer vision tasks, including object recognition by  
451 isolating objects or regions within an image (Garcia-Garcia et al., 2018; Jin et al., 2022), object  
452 tracking (Zhao et al., 2021), and interpreting a scene with multiple objects (Byeon et al., 2015).  
453 This process has traditionally been performed manually; however, it remains subjective  
454 (Schmelzle et al., 2017) and time-intensive (Hughes et al., 2022). ML techniques offer a useful  
455 way of overcoming these issues.

456 Numerous automated image segmentation algorithms have been developed in the past  
457 decades that do not require DL (Boykov et al., 1999; Dhanachandra et al., 2015; Minaee and  
458 Wang, 2019; Najman and Schmitt, 1994; Nock and Nielsen, 2004; Otsu, 1979). Yet, in recent  
459 years, DL has introduced novel methods linked to high-performing models able to achieve high  
460 accuracy rates on common benchmarks (Kale and Thorat, 2021; LeCun et al., 2015; Luo et al.,  
461 2021; Yu et al., 2022; Zhao et al., 2021). DL-based segmentation methods are the state-of-the-  
462 art for many image segmentation challenges and often outcompete other automated methods.

463 For example, Sashimi, a toolkit developed by Schwartz & Alfaro (2021), was introduced to  
464 simplify high-throughput organismal image segmentation using DL. The toolkit underwent  
465 testing by automatically segmenting the target fish images from photos with both standardised  
466 and complex, noisy backgrounds. By utilising advanced DL techniques, such as the meta-  
467 algorithm Mask R-CNN, it aims to improve the efficiency and precision of image segmentation,  
468 ultimately leading to significant progress in image analysis and classification.

469 Beyond extracting a complete representation of a specimen from an image, most biological  
470 applications will need to identify specific features, whether individual traits or entire elements.  
471 Perhaps more than any other aspect, this step is overwhelmingly manual at present and as  
472 such represents the primary bottleneck for big data phenomic analyses from comparative  
473 datasets. Automated approaches to identifying and isolating features, traits, and elements,  
474 however, is perhaps the most important area to develop, as it would potentially allow for  
475 continuity of information on biological homology in large-scale comparative analyses and for  
476 removal of subjective decisions in trait descriptions. For example, methods that could extract  
477 individual elements of a larger structure could then allow one to conduct quantitative analyses of  
478 just those isolated structures, or analyses of the relationships among structures (i.e. phenotypic  
479 integration and modularity (Zelditch and Goswami, 2021)), where existing automated  
480 morphometric methods typically are homology-free and capture overall shape but cannot  
481 identify which elements are actually changing in a multi-element structure.

482 For image data, most efforts at feature extraction have focused on 2D images, extracting  
483 features such as size and shape, or using pixel intensity and edge characteristics to extract a  
484 plurality of features that are then subjected to dimensionality reduction by identifying those that  
485 are most relevant for the particular task. This reduction can select features based on impact of  
486 downstream results (e.g., classification), or by using PCA or similar approaches to identify the  
487 major components of variation across a dataset (Grys et al., 2017). Along these lines, there are

488 established applications of AI approaches to the recognition of phenotypes and phenomics in  
489 medical research, for instance in mining health records (Frey, 2018). These approaches have  
490 also been used to identify known phenotypes associated with specific genetic variants (Zhang et  
491 al., 2022) or experimental treatments, as in Latent Space Phenotyping, a novel image analysis  
492 method that allows the automated recognition of the response to treatments from sequences of  
493 images, e.g. different growing conditions of crops (Ubbens et al., 2020). DL has also been  
494 applied to feature recognition relating to movement, such as in human foot bone morphology  
495 (Ma and Zhi, 2022). These approaches are less common for interspecific datasets; however,  
496 they have been applied to recognize and categorise fossil samples. Elsayed (2023) developed  
497 an automated approach for identifying and classifying tooth fossils from various animals,  
498 including sharks, elephants, hyrax, and primates. Deep-learning algorithms, such as CNN and  
499 deep CNN, were trained to recognize, classify, and extract pertinent details from 2D images of  
500 teeth fossils. The proposed methods were verified and can be used in various morphology and  
501 palaeontology research settings.

502

## 503 Segmentation

504 ML and DL approaches to image segmentation are also routinely applied to images forming a  
505 3D stack and achieves accurate results with processing scans from CT (Ait Skourt et al., 2018)  
506 and magnetic resonance imaging (MRI) (Lösel and Heuveline, 2017) (Case Study 2). Due to the  
507 special characteristics of these types of imaging, such as greyscale and volumetric images with  
508 depth information, specific ML and DL models have been developed, particularly for medical  
509 images (Milletari et al., 2016; Ronneberger et al., 2015). These methods allow for greater  
510 consistency amongst measurements and allow for scalable studies (Willers et al., 2021). In  
511 addition, user-friendly tools for segmenting medical images have been developed that offer  
512 built-in features for automatic image segmentation such as Dragonfly (Comet Technologies  
513 Canada Inc., 2022) and Biomedisa (Lösel et al., 2020). These have since been applied to  
514 biological systems (Lösel et al., 2023; Mulqueeney et al., 2024).

515

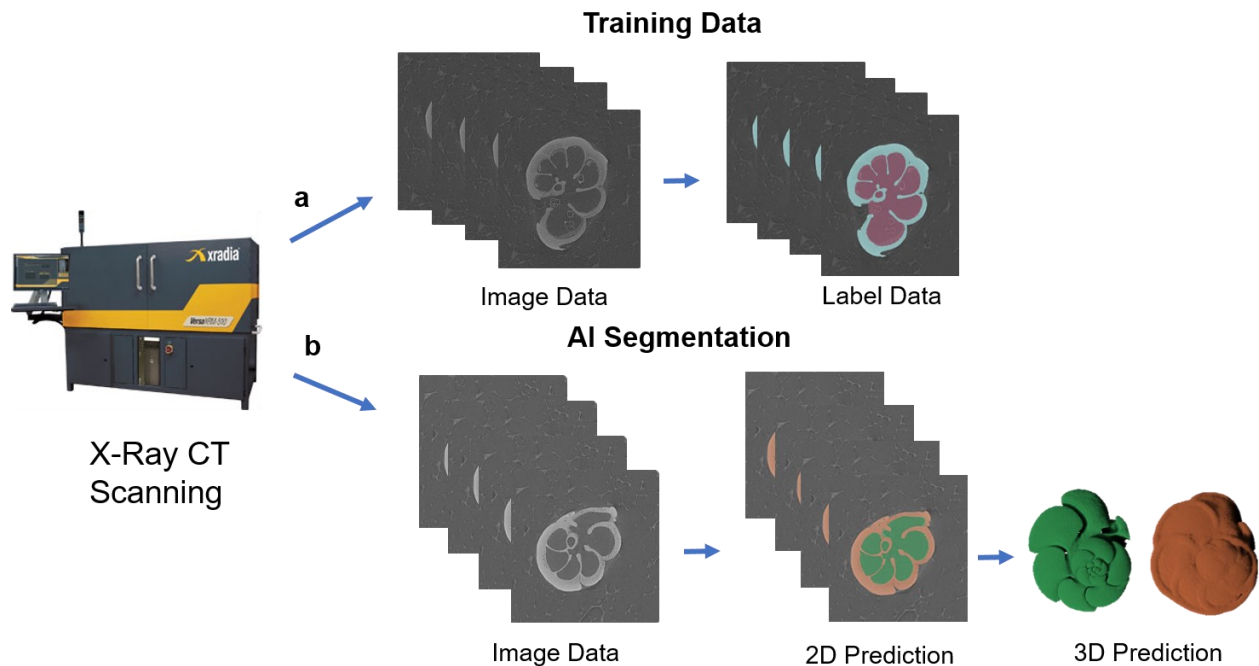
516

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## 517 Case study 2: Image segmentation for volume rendering

518 DL tools such as Biomedisa (Lösel et al., 2020) have emerged as powerful solutions for  
519 automating feature extraction from 3D images (Figure 7). Additionally, semi-automated batch-  
520 processing pipeline MiTiSegmenter can bulk segment and label around 200 samples from  
521 microCT data (Kendrick et al., 2022). They offer an efficient alternative to labour-intensive and  
522 potentially biased manual image segmentation methods. In the study by Mulqueeney et al.  
523 (2024) the efficacy of these neural networks is shown to be influenced by the quality of input  
524 data and the size of the selected training set. In the context of this case study, this is reflected in  
525 the ability for different networks to extract specific traits. In the smaller training sets, predicting  
526 the volumetric and shape measurements for internal structures presents a greater challenge

527 compared to the external structure, primarily due to sediment infill (Zarkogiannis et al., 2020b,  
 528 2020a). However, by increasing the training set and applying data augmentation, this problem is  
 529 mitigated. This reaffirms the principle that expanding the training set leads to the production of  
 530 better DL models (Bardis et al., 2020; Narayana et al., 2020), albeit with diminishing returns as  
 531 accuracy approaches 100% (Kavzoglu, 2009). These findings help to highlight how training sets  
 532 can be designed for optimal use in precise image segmentation that is applicable for obtaining a  
 533 wide range of traits.



534  
 535 Figure 7: Workflow for producing training data and applying a deep convolutional neural network  
 536 (CNN) to perform automated image segmentation. The workflow includes (a) the creation of  
 537 training data for the input into Biomedisa and (b) an example application of the trained CNN to  
 538 automate the process of generating segmentation (label) data.

539

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540  
 541 Beyond increasing efficiency of segmentation over manual thresholding, DL-assisted  
 542 segmentation may be beneficial whenever thresholding ROIs is not possible. For example,  
 543 when specimens being scanned are very dense, scans may not have a consistent perceived  
 544 density (e.g. Alathari, 2015; Furat et al., 2019). Objects of similar densities may not be displayed  
 545 at the same greyscale value through the scan, though the structural properties of the material  
 546 will be evident. Scans like these are often also very noisy as a result of the high power of the  
 547 beam needed to penetrate them, this frequently results in artefacts and irregularities within  
 548 images (Das et al., 2022). Hence, thresholding cannot always obtain a clear segmentation,  
 549 leaving manual segmentation as the only recourse prior to these models being implemented. A  
 550 DL segmentation model however can be trained to segment scans based on visual patterns  
 551 when a minimal number of slices are pre-labelled (Tuladhar et al., 2020). Noteworthy uses of

552 this approach include distinguishing fossils from rock matrices with a comparable composition  
553 within CT images (Edie et al., 2023; Yu et al., 2022), a common problem when imaging  
554 palaeontological specimens. In their recent study, Yu et al. (2022) addressed the difficulties of  
555 labelling and segmenting CT images, specifically in dinosaur fossils. Traditional manual  
556 segmentation methods can be time-consuming and prone to errors due to subjective judgments.  
557 To overcome these limitations, the authors employed DL techniques, specifically CNNs, to  
558 automate and improve the accuracy of CT image segmentation.

559 Another case where DL segmentation may be useful for CT data is when attempting to segment  
560 regions of an object made of the same material (i.e., if an object of a single material ossifies as  
561 a single structure but has varying patterns of ossification along the structure) or when multiple  
562 objects have similar densities. DL segmentation models have also shown to accurately segment  
563 these objects into different ROIs based purely on pattern. Improvements in the quality of image  
564 data acquisition (Withers et al., 2021) alongside the increasing selection of good models (L.  
565 Wang et al., 2021) and training sets (Nikolados et al., 2022) for biological data are further  
566 assisting in mitigating these common issues in image segmentation with DL approaches.

567 The ability to easily separate discrete modules has the potential to greatly simplify workflows  
568 that are currently mostly manual. An application of these automated or semi-automated  
569 segmentation procedures is the isolation of complex biological features or structures that are  
570 both time-consuming and difficult to extract manually, such as vertebrate skeletal systems. For  
571 instance, skulls are made up of several distinct, overlapping bones—sometimes including other  
572 elements such as horns and teeth—the challenge of separating these elements efficiently would  
573 be greatly simplified by the application of these methods (Case Study 3). Additionally, this would  
574 allow the segmentation of morphological features enclosed within or defined by the interaction  
575 between bones, such as endocasts and closed cavities within bones, as well as open-ended  
576 sutures. More work in this area will be critical for AI approaches to evolutionary morphology.

577 Beyond file types, the majority of current methods use human sculpted 3D elements as  
578 benchmarks (Chen et al., 2009). These 3D models are generally very low polygon count and  
579 manifold, and as a result do not reflect the majority of real-world examples. Work by Schneider  
580 *et al.* (2021) attempted to address this by developing a segmentation pipeline able to process  
581 higher-polygon and non-manifold meshes. This is ideal for geometric morphometrics, where  
582 variations in morphology of focal specimens are only discernible when meshes have sufficient  
583 polygons to properly map their topology.

584 Finally, while identifying known phenotypes from supervised learning is relatively  
585 straightforward, although practical limitations of computational power can hinder 3D image data  
586 analyses, it is less clear whether unknown or novel phenotypes are similarly recognisable, or if  
587 trained models can accommodate large amounts of variation, both of which will be common in  
588 analyses of evolutionary morphology. Nonetheless, employing AI to identify new or cryptic  
589 features, and by extension, new species, has great potential, particularly in light of promising  
590 applications of unsupervised learning to discover unknown phenotypes, for example in cell  
591 morphology (Choi et al., 2021).

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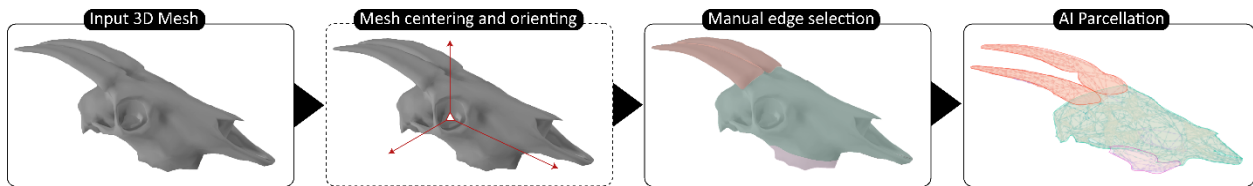
### 595 Case Study 3: Feature extraction and region/specimen isolation via 596 Parcellation

597 When employing automated shape analysis tools, it is often required to extract features from the  
598 entire mesh. For instance, in the context of 3D geometric morphometrics applied to the skulls of  
599 antlered animals, it is currently necessary to exclude the antlers and teeth from the specimen,  
600 as historical landmarked data has. These regions exhibit significantly higher morphological  
601 variation when contrasted with the skulls themselves. Moreover, the antlers and teeth might  
602 warrant their own shape analysis, independent from the skull.

603 Below are outlined the major steps for a case study of segmenting antlers and teeth from the  
604 skull (Figure 8). We utilise Blender, an open-source 3D software, along with its Python scripting  
605 tools for this purpose. Initially, we import the meshes as PLY files and, optionally, centre them to  
606 the origin. If you choose to centre the mesh, it is crucial to export it to ensure that the new  
607 coordinates align with the subsequent segmentation. Once centred, access the "scripting"  
608 workspace at the top of the window. Run the first script to initialise the vertex groups. Change  
609 the 3D view to "edit mode" and the select mode to "edge selection". Begin selecting the edges  
610 of specific classes and assigning them to the associated vertex group. After assigning a cluster  
611 of edges run the second script to update the colour of the mesh to match the new vertex  
612 groupings. Because vertices can be assigned to more than one group, the antlers and the teeth  
613 were assigned first to prevent overlapping specific edges. The third script is then run to assign  
614 all unassigned vertices to the skull group, this ensures no edge is assigned to more than one  
615 group. Open the system console under the window tab then run the fourth script, this will check  
616 that all vertices are assigned and mutually exclusive. Finally, run the script to export the edges.

617 There are numerous practical issues to solve in extracting features and traits from 3D image  
618 data. As in image segmentation, one of the foremost challenges in feature or trait extraction  
619 emerges when differentiating tissues or objects exhibiting low contrast disparities, often arising  
620 from either similar material densities or the specific imaging techniques employed (Tuladhar et  
621 al., 2020). As noted above, conventional methods such as thresholding or region-growing face  
622 difficulties in precisely discerning objects under such conditions. To address these limitations,  
623 contemporary solutions harness the power of DL. Similarly, DL also finds application in  
624 extracting distinct parts of biological anatomy, utilising either semantic segmentation techniques  
625 (Hou et al., 2021) or well-crafted training sets (Lösel et al., 2023), even in scenarios where  
626 density values closely resemble each other (Case Study 4). Although these methods currently  
627 require some manual intervention, they undeniably contribute to substantial reductions in  
628 processing times. Challenges may still arise, particularly in the presence of artefacts or  
629 irregularities in images (Das et al., 2022) or when dealing with damaged samples (Zhang et al.,  
630 2022). Nevertheless, ongoing advancements in these techniques indicate a trend of continual  
631 improvement and broader application, and we highlight some recent examples here.

632 Different AI algorithms have proven capable of classifying taxa from CT images using feature  
633 extraction. For example, Hou et al. (2020) introduced the ADMorph dataset, which trained and  
634 evaluated DL models for the morphological analysis of 3D digital microfossils. The study  
635 focused on enhancing the accuracy of DL models by testing the segmentation performance of  
636 multiview convolutional neural networks, PointNet, and VoxNet. The dataset aims to facilitate  
637 developing and evaluating DL algorithms for the precise analysis and classification of  
638 microfossil structures. Hou et al. (2021) further expand the prior study by highlighting the  
639 potential of DL to automate segmentation and accurately delineate and classify about 500 fish  
640 microfossils within CT images.



641

642 Figure 8: Workflow for segmenting antlers and teeth from a skull using Blender

643

644

645 As noted above, parcellation of segmented elements allows for more in-depth analysis of  
646 specific areas of focus. In 2D analysis, these methods are present in behavioural ecology and  
647 neuroscience, where limb tracking of segmented species in video footage is used to infer  
648 behaviour of individuals (Marks et al., 2022; Mathis et al., 2018). Similar to 2D, 3D semantic  
649 segmentation using CNNs has started gaining traction, notably in the field of pathology  
650 (Rezaeitalashmahalleh et al., 2023; Schneider et al., 2021), engineering (Bhowmick et al., 2020;  
651 Kong and Li, 2018) and materials science (Holm et al., 2020; Zhu et al., 2020), and is similarly  
652 useful for evolutionary morphology. For example, extracting individual structures, such as  
653 sutures, from micro-CT scans of whole crania allows detailed analysis of their morphology and  
654 the factors driving their evolution (Case Study 4).

655 This approach, however, comes with some important challenges when applied to 3D data. First,  
656 the high diversity of data types and extensions in which 3D reconstructions can be stored (e.g.,  
657 .ply, .vol) poses problems to the homogenisation of automated segmentation procedures.  
658 Second, the quality of 3D data can also be an issue. Current methods normally employ human-  
659 sculpted 3D elements as benchmarks (Chen et al., 2009), which tend to have low polygon  
660 counts and thus do not reflect most biological datasets. As a result, semantic segmentation of  
661 3D reconstructions has proven challenging, with various methods attempting to overcome  
662 quality issues in the CT data (Schneider et al., 2021; Shu et al., 2022; Sun et al., 2023).

663

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665



666 Case study 4: Image segmentation for feature recognition and automatic  
667 trait extraction

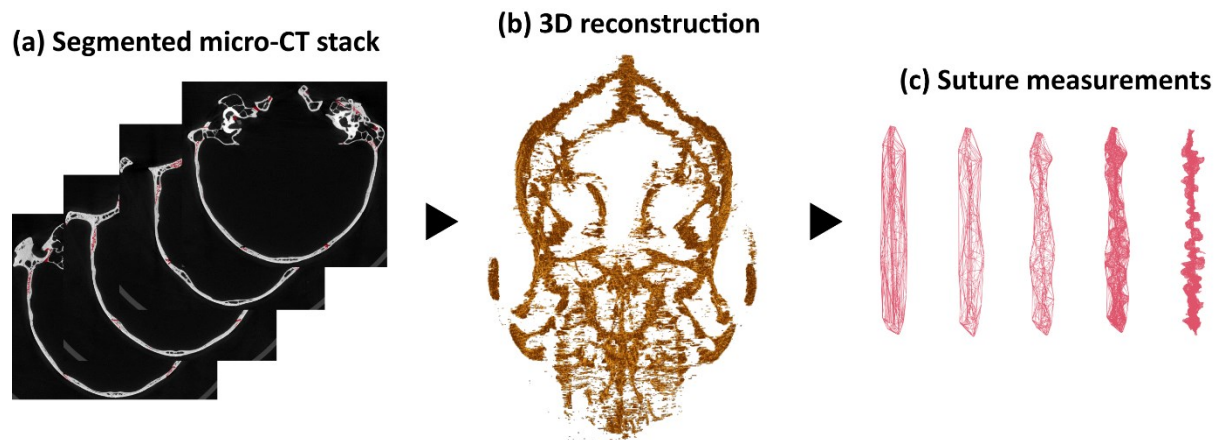
668 Instead of parcellating scans, segmentation can be used directly as phenotypic features. This  
669 section focuses on a use case of the segmentation of cranial sutures for phenotypic analysis.

670 Cranial sutures are fibrous bands of connective tissue that form the joints between the cranial  
671 bones of vertebrates (White et al., 2021). These features are bounded on two sides by the  
672 bones that they connect, but, unless fused, they are open-ended dorsally and ventrally (Lenton  
673 et al., 2005). This presents an issue in that their digital isolation (segmentation) is a highly time-  
674 consuming and skill-intensive task, which makes building large datasets for biological  
675 comparisons very challenging. We propose a pipeline to address this methodological challenge  
676 using DL (Figure 9), summarised as follows:

- 677 (1) Create training data: As sutures are difficult and time-consuming to label, we  
678 segment one out of every 100 slices (or a specified number of slices) to include as  
679 many scans in the training set as possible. Additionally, a test set is created with  
680 sutures segmented throughout the entire stack for a few scans, which can ensure the  
681 evaluation is more robust.
- 682 (2) Train models: We use the training set to train DL models. To address the class  
683 imbalance issue, which is caused by sutures normally being small regions, we  
684 implemented specific sampling and weighting techniques. We then evaluate the  
685 model performance on the test set.
- 686 (3) Predict: Sutures for the rest of the scans can be predicted using a well-performing  
687 model from the training. These predictions can be reviewed by experts to generate  
688 high-quality suture segmentation. The resulting segmentations can be used as a new  
689 training set to enhance model performance, or used for downstream analysis.

690 After this pipeline, we expect to segment sutures from skull CT-scans efficiently. Subsequently,  
691 we can use computational methods such as Fourier transform and alpha-shape analysis and  
692 landmark-free geometric morphometrics to quantify characteristics of the sutures.

693 Beyond sutures, such a pipeline would be applicable to segmenting (both in 2D and 3D) any  
694 open- or close-ended structure, biological or not, that is defined by the interactions between  
695 other structures (i.e., cranial endocasts, chambers in mollusc shells, cracks in bones and other  
696 materials, junctions between cells).



697  
 698 Figure 9: A workflow for extracting sutures on Micro-CT scans. This workflow includes (a)  
 699 segmenting sutures on Micro-CT scans of mammal skulls. Segmented sutures are used to  
 700 generate (b) 3D reconstructions, which can then be used to calculate (c) suture measurements.  
 701 (c) shows an example of using alpha-shapes to quantify the complexity of 3D suture  
 702 reconstructions following method of Gardiner et al. (2018).

703

704

## 705 Phenomics

706 Phenotype encompasses morphology, behaviour, development, and physiology, all of which  
 707 mediate an organism's interactions with other species and its habitat. Phenomics extends  
 708 phenotype to its genetic, epigenetic, and environmental drivers. Analysis of phenomes thus  
 709 entails a variety of traits, all of which are essential to be able to understand the dynamics of  
 710 organismal evolution, yet the resolution as to which we can currently measure is limited. Here,  
 711 we discuss how AI techniques can be used to more effectively describe phenotypic traits  
 712 specific to morphology, with sections related to discrete and meristic traits, univariate measures,  
 713 shape (including linear and geometric morphometrics), colour, and pose estimation.

## 714 Discrete and Meristic Traits

715 Morphological traits underpin the study of phenotypic evolution within phylogenetic systematics  
 716 (Hennig, 1966). Nonetheless, morphological traits for phylogenetic applications have many  
 717 limitations (Lee and Palci, 2015). Discrete traits manually scored by each researcher or meristic  
 718 traits such as element counts collected from specimens have proven time-consuming and  
 719 difficult to collect due to personal interpretations and potential errors (Wiens, 2001). Despite  
 720 this, discrete traits are critical for diverse aspects of evolutionary study; for example, they are  
 721 essential to time-calibrate molecular phylogenies and to reconstruct phylogenetic relations  
 722 among extinct taxa (Lee and Palci, 2015; Smith and Turner, 2005). Discrete and meristic data  
 723 are also useful for evolutionary analyses of morphology, evidenced by foundational works of  
 724 morphological disparity (Foote, 1997, 1993; see Goswami and Clavel, 2024 for a full review).

725 AI tools have shown potential in recognising and extracting discrete and meristic traits to build  
726 morphological matrices for phylogenetic analysis in a quicker and more robust way. Deep  
727 learning neural networks, including CNNs have been successfully applied on small training  
728 datasets to recognise species and extract both discrete and meristic traits (Wäldchen and  
729 Mäder, 2018). Other examples include using ML tools to extract, classify and count reproductive  
730 structures (Goëau et al., 2022; Love et al., 2021), as well as to produce basic measurements  
731 such as leaf size (Hussein et al., 2021; Weaver et al., 2020). These methods have also been  
732 shown to work on x-ray scans of fossil leaves (Wilf et al., 2021), including counting stomatal and  
733 epidermal cells for palaeoclimatic analysis (Zhang et al., 2023). A similar CNN algorithm has  
734 also been successfully applied to classify freshwater fish by genera from the Amazon region  
735 using photos of museum specimens, for which, traits were recognised with 97% confidence  
736 (Robillard et al., 2023). In animal species traits identification, Random Forest algorithms have  
737 also shown promising results. For example, they performed better than traditional Linear  
738 Discriminant Analysis in delimiting between species of snakes from field photos when given a  
739 set of morphological traits (Smart et al., 2021).

740 Overall, each of these algorithms have the potential to be used in morphological trait extraction  
741 and phylogenetic analysis by training them to classify new images for a set of traits and using a  
742 training dataset representing the variation in the species or genus for the traits of interest.

## 743 Univariate Measures

744 Morphometrics, the quantification of biological form, allows for direct comparison of size and  
745 shape across structures or organisms. Univariate metrics have dominated morphometrics for  
746 centuries, but the extraction of univariate traits from a substantial pool of individuals has  
747 historically been a laborious and time-consuming process, imposing limitations on available data  
748 (Fenberg et al., 2016). Addressing this challenge, AI tools have emerged as effective solutions,  
749 streamlining the extraction of univariate traits, including lengths, mass, and size, particularly in  
750 2D images. For instance, neural networks have proven adept at extracting linear  
751 measurements, as illustrated by the accurate forewing length extraction of 17,000 specimens of  
752 butterflies (Wilson et al., 2023). Moreover, these AI techniques have extended their capabilities  
753 beyond simple length measures, such as by measuring plant leaf areas (Kishor Kumar et al.,  
754 2017; Mohammadi et al., 2021). Advanced techniques have further facilitated the measurement  
755 of length across individual anatomical regions, offering a more nuanced understanding than  
756 traditional whole-body length measures (Ariede et al., 2023). These techniques have also  
757 enabled the extraction of shape proxies, such as ellipticity (Freitas et al., 2023), and the  
758 simultaneous analysis of multiple univariate traits (Fernandes et al., 2020).

759 AI methodologies have seamlessly extended their proficiency from extracting 2D univariate  
760 traits to 3D, by employing analogous methods to obtain linear measurements of both length and  
761 width within 3D images (Hu et al., 2020; Lu et al., 2023). Similar to the techniques applied to  
762 their 2D counterparts, these methods can concurrently extract multiple traits from individual  
763 images (Wu et al., 2021) and tally features across diverse regions in 3D images (Yu et al.,  
764 2021). Moreover, they are capable of providing volumetric measures of multiple components

765 through the application of image segmentation (Lösel et al., 2023; Mulqueeney et al., 2024).  
766 This advancement represents a notable stride in using AI to extract intricate 3D data.

## 767 **Shape**

768 Univariate or linear morphometrics has been a tool in evolutionary morphological analysis for  
769 centuries, but recent years have seen an explosion of geometric (landmark-based) and surface  
770 morphometrics, greatly increasing the scope for capturing and quantifying organismal shape.  
771 While surface methods are relatively new, they are expanding rapidly, and geometric methods  
772 are well established and offer great potential to increase understanding of evolutionary  
773 dynamics (Mitteroecker and Schaefer, 2022). Below we discuss various approaches to  
774 multivariate shape analysis and existing AI applications.

## 775 **Geometric morphometrics**

776 One of the most common ways to quantify and analyse evolutionary morphology at present is  
777 by applying geometric morphometrics. This inherently multivariate methodology requires the  
778 placement of landmarks that produce two-dimensional or three-dimensional coordinates by  
779 labelling homologous anatomical loci to describe biological shapes (Adams et al., 2004;  
780 Mitteroecker and Schaefer, 2022). Raw coordinates are then transformed using a  
781 superimposition method, commonly Procrustes analysis, which uses scaling, rotation and  
782 transformation to register objects to a common reference frame so that only biological variation  
783 remains (Bookstein, 1997). The main advantages of geometric morphometrics include the ability  
784 to densely sample complex shapes in three dimensions, the ability to localise variation, the  
785 retention of information on biological homology, and the utility of coordinate data for numerous  
786 downstream analyses, from macroevolutionary to biomechanical analysis. However, geometric  
787 morphometric methods are time-consuming, prone to observer bias, and lack repeatability  
788 (Shearer et al., 2017). Moreover, current methods are limited in their scope, in particular  
789 because they rely on homologous points of comparison. As a result, they quickly lose  
790 explanatory value with increasingly disparate taxa, as homologous points become more difficult  
791 to identify and thus fewer in number. As a result, geometric morphometrics is still a largely  
792 manual endeavour for comparative datasets, with even semi-automated tools requiring  
793 extensive manual effort (Bardua et al., 2019). The introduction of new automated approaches  
794 for the analysis of shape may allow us to overcome some of these issues, though the need for  
795 grounding in homology will always be a constraint, as well as a critical requirement for  
796 maintaining biological meaningfulness, of this approach.

797 Two distinct groups of approaches have been developed to circumvent the manual effort of  
798 geometric morphometrics: automated landmarking and 'landmark-free' or 'homology-free'  
799 methods. The former is based on the same principles as geometric morphometrics, but seeks to  
800 minimise the user's workload by automating placement of homologous landmarks. These  
801 methods frequently rely on image registration to propagate landmarks from one set of  
802 individuals, or a generic template, to another (Maga et al., 2017; Young and Maga, 2015).  
803 These often lack precision in identifying anatomical loci, even in closely related taxa; therefore,  
804 to improve the obtained results, others have attempted to use DL and computer vision to the  
805 problem of landmark annotation. In 2D images there is the capacity to automatically place

806 landmarks (Porto and Voje, 2020; Case Study 5), while those available for 3D images at present  
807 use AI to optimise landmark position after placement, thereby improving accuracy after mapping  
808 of landmarks from a template to specimens (Devine et al., 2020). Landmark placement tools are  
809 currently only available for 2D images (Porto and Voje, 2020), but these methods have been  
810 shown to reduce both data collection time and error and increase repeatability, thereby  
811 supporting phenomic-scale data collection for large data sets. Unfortunately, some  
812 implementations are computationally demanding to apply, particularly when using 3D data, and  
813 all applications at present behave poorly with even a moderate amount of variation, effectively  
814 limiting applications to analysis of conspecifics or congeneric species.

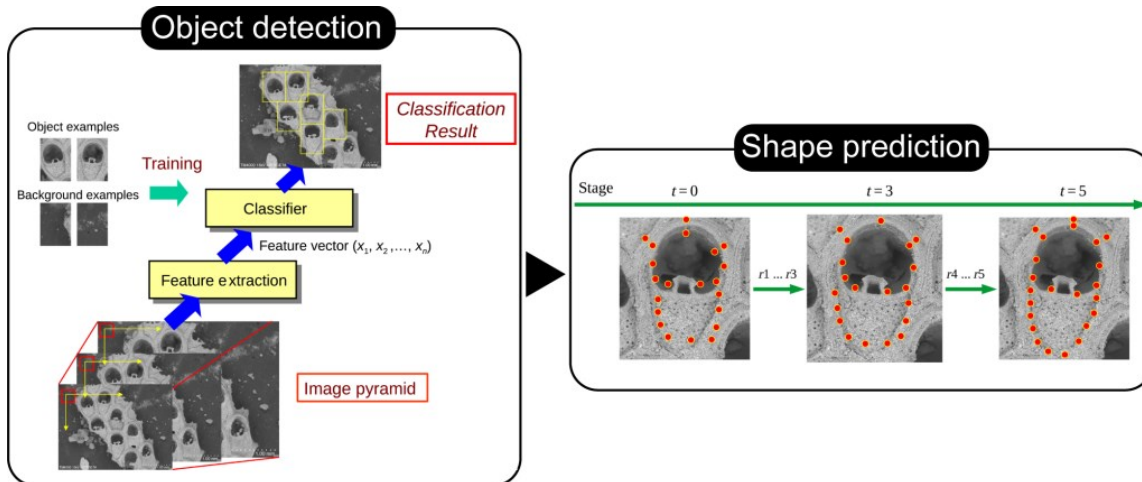
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816

## 817 Case study 5: Geometric morphometrics - automated landmarking

818 Geometric morphometrics is a powerful tool for quantifying and comparing morphology across  
819 organisms and has become the dominant approach for morphometric analysis over the past few  
820 decades. However, identifying and placing landmarks and semilandmarks on 2D or 3D images  
821 remains a largely manual and thus time-consuming process, as well as being prone to human  
822 error and interuser variation. Thus far, AI has been successfully applied to landmark and  
823 semilandmark data capture within species and among congeners, ranging from fruit flies (Porto  
824 and Voje, 2020; Salifu et al., 2022), to bryozoan colonies (Porto and Voje, 2020), to mice  
825 (Devine et al., 2020; Porto et al., 2021). 3D applications at present use image registration and  
826 map landmarks from an atlas onto specimens, and then integrate DL for optimization of  
827 landmark placement (Devine et al., 2020). Perhaps the most advanced implementation of DL for  
828 landmarks placement at present uses a supervised learning approach combining object  
829 detection and shape prediction to annotate landmarks (Figure 10) (Porto and Voje, 2020).  
830 Object detection, using a histogram of gradients features rather than the more common but less  
831 efficient CNN approach, was used to first identify the structure of interest, followed by shape  
832 prediction to annotate landmarks. This approach was successfully applied to three datasets of  
833 varying complexity, with object detection in particular performing well for all datasets. While only  
834 implemented for 2D images at present, the speed of data collection achieved in that study is  
835 remarkable (e.g., >13,000 bryozoan zooids annotated in three minutes, approximately the same  
836 needed to manually annotate one zooid; Porto and Voje, 2020) and demonstrates the great  
837 potential of AI applications to geometric morphometrics and the need to develop  
838 implementations for 3D data.



839  
840

841 Figure 10: Workflow for automated landmarking in Porto and Voje (2020), showing (a) the object  
842 detection framework where a training set is used to first extract features and then perform  
843 classification and (b) perform shape prediction using a cascade shape regression model to  
844 refine the landmark predictions.

845  
846

## 847 Landmark-free morphometrics

848 Landmark or homology-free methods seek to remove the placement of landmarks altogether;  
849 instead, they focus on describing the entire shape of the selected specimens. There are several  
850 methods within this family and most do not directly use AI at present, but we note a few of them  
851 as they are promising areas of current development. The most common approaches either  
852 decimate a mesh into a large number of pseudolandmarks (i.e., points without any homology)  
853 (Boyer et al., 2015; Pomidor et al., 2016) or use an atlas-based diffeomorphic approach  
854 (Durrleman et al., 2014; Toussaint et al., 2021). Both of these approaches allow shapes that do  
855 not share homology to be compared and limit the loss of geometric information, but they may be  
856 prone to sensitivity to factors outside of just shape, including alignment and scaling.  
857 Nonetheless, they offer a potentially rich source of data for AI applications, as we discuss here  
858 with particular emphasis on diffeomorphic methods.

859 Broadly, diffeomorphic methods involve a shape on a deformable grid that can be stretched and  
860 compressed, with mathematical tools called *diffeomorphisms*, to resemble other shapes. These  
861 methods, often referred to as methods of elastic shape analysis due to the *elastic* nature of  
862 them, can be used to quantify dissimilarities between shapes, register (*match*) shapes together,  
863 and analyse morphometry, all without requiring landmarking. Techniques that incorporate these  
864 methods include Large Deformation Diffeomorphic Metric Mapping (LDDMM) (Beg et al., 2005),  
865 the Square Root Velocity Framework (Srivastava et al., 2011), and Currents (Benn et al., 2019).  
866 One way *elastic* landmark-free techniques are proving increasingly useful is when analysing

867 morphometry in a two-dimensional sense, for example, when studying the boundaries of objects  
868 seen in images. Here, instead of requiring landmarks on the boundaries, the boundary curve is  
869 analysed as a whole. Importantly, this also allows for possible invariances to be handled. For  
870 example, the metrics within methods can be made to be invariant to shape-preserving  
871 transformations, such as scaling, translation, rotation, and/or reparametrization (i.e., *where* on  
872 the boundary, the curve starts/ends).

873 There are some diffeomorphic methods that can be expanded into higher dimensions as seen  
874 with open curves (Lahiri et al., 2015) and closed curves (Klassen and Srivastava, 2006) - this  
875 can prove particularly useful in the analysis of curves on surfaces in evolutionary datasets.  
876 There has also been recent research on elastic methods focused on surfaces (Hartman et al.,  
877 2023; Jermyn et al., 2017; Pierson et al., 2021). As described in Hartman *et al.* (2023), the  
878 techniques here can be categorised into two sections, those that apply to parameterized  
879 surfaces and those on unparametrized surfaces (i.e. containing no known point landmarks).

880 Methods of elastic shape analysis can play an important role in ML, whether this is with classical  
881 methods or combined with the latest DL tools. These applications can broadly be split into the  
882 following three categories:

- 883 1. **Elastic Shape Analysis as a classical machine learning tool:** One motivation for the  
884 use of elastic shape analysis is that it allows us to consider the space of the objects we  
885 wish to analyse and define our metrics with respect to this space; therefore not  
886 assuming linearity of spaces (unlike traditional landmark-based methods). This enables  
887 us to create a framework to compute statistics, analogous to standard tools on linear  
888 spaces. One such analogue is Principal Component Analysis (PCA), which is a standard  
889 tool for dimension reduction in classical ML. This can be done in various ways, from  
890 defining ways to work directly on the space of objects or a tangent space to that space  
891 (as it is often mathematically and computationally simpler, as described in Srivastava *et*  
892 *al.* (2011)), or by transforming the original objects into a linear space, and then  
893 performing standard PCA, as can be done with the framework seen in Benn *et al.*  
894 (2019).
- 895 2. **Elastic methods as a pre-processing technique for machine learning:** In recent  
896 years we have seen elastic diffeomorphic methods applied to real-world datasets and  
897 then combined with ML algorithms to provide tools to analyse morphological data. This  
898 technique is particularly helpful when a distance matrix can simply be incorporated within  
899 a ML algorithm. For example, in Salili-James *et al.* (Salili-James et al., 2022a),  
900 diffeomorphic metrics were used to quantify differences between the shapes of natural  
901 objects such as boundary curves of gastropods and leaves and then combined with a  
902 classical supervised ML algorithm (namely, K-Nearest Neighbour) to classify genus and  
903 species, based purely on the morphology of the object.
- 904 3. **Machine Learning algorithms with elastic metrics.** ML algorithms will often have a  
905 *distance metric* embedded within them. These are especially apparent in classical  
906 (statistical) methods of classification (which is SVM) and clustering (which is K-means),  
907 where a metric is used to compare the relative position of two points in a dataset. The  
908 choice of metric here can sometimes greatly affect the results, and naturally there are

909 times where a landmark-free elastic (e.g., geodesic) metric can be better suited to the  
910 algorithm than standard (often linear) metrics. Furthermore, there have recently been  
911 studies that have incorporated DL techniques with elastic metrics, such as in Hartman et  
912 al. (2021). Here, a Siamese neural network was trained to predict square root velocity  
913 distances between curves, such as the boundary curves of leaves from the notable  
914 Swedish Leaf Dataset (Söderkvist, 2016, 2001). Thus, it is justifiable to expect more  
915 studies showing DL methods combined with elastic metrics in the near future.

916

917 Another family of approaches mathematically describe the surface of the selected objects using  
918 integral geometry (L. Wang et al., 2021). These surface descriptors can describe the shape of  
919 structures independently and may not suffer from issues of invariance and alignment to the  
920 same extent as the landmark-free approaches noted above. However, some applications  
921 remain limited, and they have not been widely tested with diverse biological datasets; thus, their  
922 efficacy remains to be established. Additionally, all of these approaches have drawn some  
923 concerns over ignoring homology (Mitteroecker and Schaefer, 2022), though there is great  
924 potential for reintroducing homology by combining these approaches with AI tools for feature or  
925 trait extraction, as described above and demonstrated in Case Study 3. These approaches  
926 could potentially be used not only to study the shape of specific homologous elements, but also  
927 could accelerate studies of modularity and integration (Zelditch and Goswami, 2022), which rely  
928 on large sample sizes to assess the relationships among structures, how those relationships  
929 reflect genetic, developmental and functional associations among traits, and how they influence  
930 the evolution of morphology over shallow to deep time scales.

931 Thus, despite the attention being paid to new AI techniques and its great potential for  
932 automating the quantification of shape, there are at present few applications to datasets above  
933 the species-level. The methods remain technical and difficult to apply, due to the need for  
934 advanced coding knowledge and access to good hardware such as high-memory GPUs or high-  
935 performance computing (HPC) systems. Developments are, therefore, required to make these  
936 methods more widely accessible and to allow for greater understanding and addressing of their  
937 capabilities and limitations.

## 938 Colour

939 Colour and patterning are key evolutionary components in taxa as diverse as insects, fishes,  
940 birds, and reptiles because of their importance in crypsis, aposematism, mimicry,  
941 communication, and sexual selection (Cuthill et al., 2017). Understanding how these patterns  
942 evolve is, therefore, crucial for understanding broader evolutionary themes such as natural and  
943 sexual selection, convergence, parallel evolution, and character displacement. Colour patterning  
944 can help researchers to recognise and discriminate between species and is commonly used in  
945 taxonomic, behavioural, and ecological studies. Traditionally, studies have been limited to  
946 qualitative descriptions, which has restricted analyses to relatively small sample sizes due to the  
947 difficulty of manually comparing large numbers of diverse and complex patterns and colour  
948 combinations. Quantitative analyses of colour patterning have become more common in recent  
949 years, with important large-scale studies being carried out in birds (Cooney et al., 2019; Dale et



950 al., 2015) and butterflies (Van Der Bijl et al., 2020). Furthermore, automated and semi-  
951 automated methods have been developed to segment colour from images (Weller et al., 2022)  
952 and to quantify and analyse colour patterns (Maia et al., 2019).

953 Such methods have helped address the limitations of manually processing data, but there are  
954 limits to automated procedures. Automated methods are much faster and less subjective than  
955 manual methods for colour segmentation, but are less flexible. Van der Bijl et al. (2020) used a  
956 colour profiling approach to assess sexual dimorphism in 369 species of butterflies, using a  
957 pixelated image to produce a linear sequence of coordinates containing lightness and colour  
958 values. This method is effective but time consuming because each specimen must be  
959 photographed, with images manipulated and standardised by hand. As a result, although  
960 containing an impressive sample size, the total number of species analysed in this study  
961 represents only 2% of the estimated 18,500 extant species of butterflies.

962 ML offers a potential solution to this bottleneck by combining the capacity to process vast  
963 amounts of data and to use large datasets to train and refine its approach. Large image  
964 datasets of museum specimens are increasingly being made available for researchers and can  
965 act as both training datasets and as comprehensive samples for analysis. ML uses feature  
966 extraction and classification to process images in species identification (Wäldchen and Mäder,  
967 2018), and this can be translated into comparing and contrasting colour patterning, by  
968 quantifying both spectral (i.e., colour and luminance) and spatial (i.e., the distribution of pattern  
969 elements) properties of colour patterns across multiple specimens. With this approach, ML  
970 methods can identify individual specimens from photographs, reducing the workload by  
971 removing the need to manually process images (Maia et al., 2019). One successful  
972 implementation is the analysis of camera trap images, with one study focussing on Serengeti  
973 images having a 96% success rate compared with a crowdsourced team of human volunteers  
974 (Norouzzadeh et al., 2018). ML has further been used to identify individuals within species of  
975 small birds (Ferreira et al., 2020), pandas (Hou et al., 2020), and primates (Guo et al., 2020),  
976 based on only minute differences in colour pattern.

977 Furthermore, the preparation and analysis of data workflows can be greatly improved with the  
978 use of AI and some of the most significant progress in this area has been conducted on  
979 museum bird specimens. DL methods have been applied to segment and extract plumage from  
980 images which greatly enhances the speed at which images can be processed and colour  
981 information extracted (He et al., 2022; see Case Study 6). This approach has been taken to  
982 even higher levels of specificity by applying pose estimation methods to identify specific points  
983 of bird anatomy regions to improve the efficiency of the pipeline for extracting colour information  
984 from specimens (He et al., 2023).

985

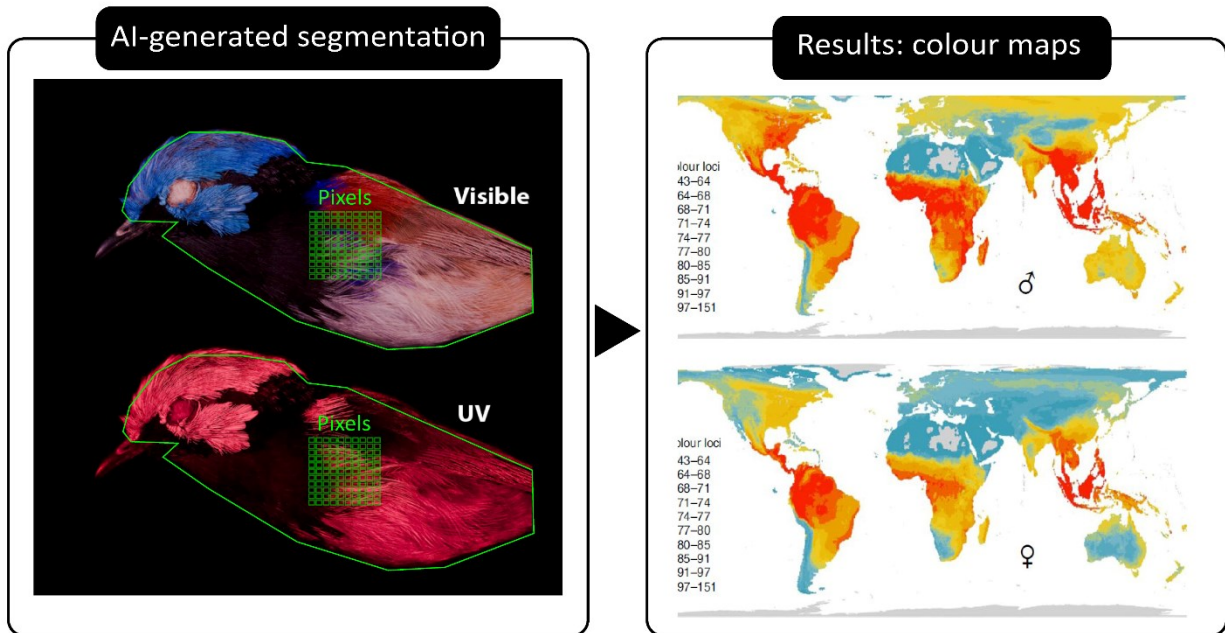
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## 987 Case study 6: Colour

988 Studying macroevolution of morphological traits often requires extensive measurements from  
989 digitised specimens. This can become extremely inefficient in large clades such as in the case

990 of birds where there are an estimated 8,000 extant species globally. Understanding the  
 991 evolution of avian species, therefore, necessitates extensive datasets of specimens even before  
 992 factors such as sexual dimorphism have been considered. Several recent studies have  
 993 employed DL models to assess plumage in birds on a global scale (Cooney et al., 2022; He et  
 994 al., 2022). DL was applied to segment the whole plumage area from photographs of over  
 995 120,000 bird photos across more than 7,500 bird species (Figure 11). The colour and ultraviolet  
 996 (UV) reflectance of the plumage were extracted from the segmentations. These measurements  
 997 were then used to study the signalling traits among Passerine birds (> 4,500 species). Findings  
 998 revealed that UV reflectance is widespread across Passerine birds and is strongly  
 999 phylogenetically conserved, and the light environment plays a significant role in the evolution of  
 1000 UV reflection (He et al., 2022). Another observation was that both male and female tropical  
 1001 Passerine species tend to be more colourful than their temperate counterparts (Cooney et al.,  
 1002 2022). These findings highlight the potential of AI-generated predictions in biological analyses,  
 1003 addressing questions and hypotheses that could not have been answered previously due to  
 1004 limitations in the efficiency of manual methods.



1005  
 1006 Figure 11: An example of using AI-generated segmentation to study bird plumage colours,  
 1007 modified from He et al. (2022).

1008

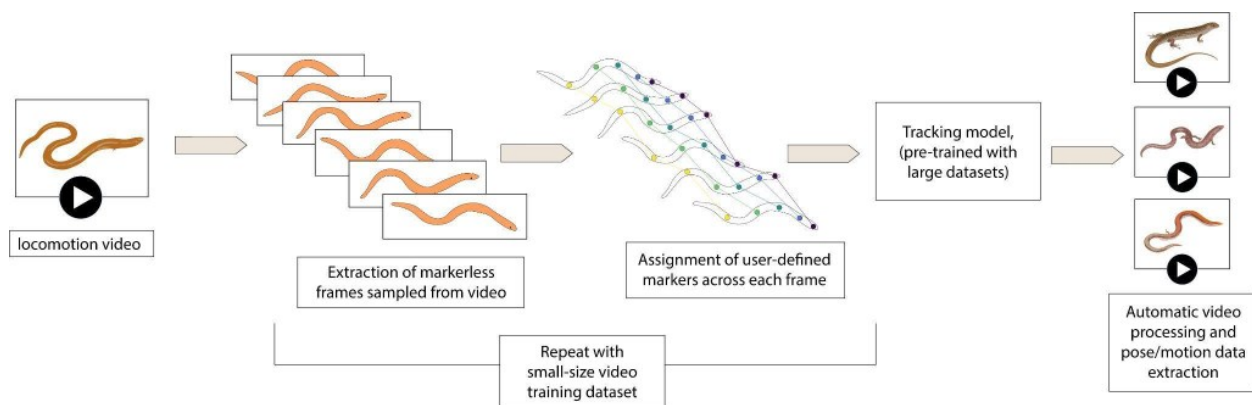
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## 1010 Pose estimation

1011 One of the major avenues of the use of ML, particularly computer vision, in the biological  
 1012 sciences has been pose estimation (Pereira et al., 2019). This approach estimates the relative  
 1013 position of body parts to each other and is used to recognise different animal poses and their

1014 changes during locomotion. While estimation is usually conducted on static images, these  
 1015 capabilities have also been adapted to recognise and quantify movement. Indeed, parsing  
 1016 kinematic patterns from videos has become the hallmark of locomotion, biomechanic, and  
 1017 behavioural studies, contributing to the rapid transformation of these fields. Pose estimation is a  
 1018 relatively simple computer vision problem, based on the annotation of training sets from images  
 1019 (Mathis et al., 2018). Originally, algorithms were unable to recognise parts that were not  
 1020 sufficiently distinct from the background, an issue called the 'background problem' (Diaz et al.,  
 1021 2013), and mitigating this required the placement of markers on the moving parts prior to  
 1022 filming. This problem was amplified in video estimation, as motion blur also constituted a  
 1023 significant challenge, requiring the use of extensive and highly specific training datasets (Nath et  
 1024 al., 2019). In light of these issues, the main element of novelty in the field has been the  
 1025 development of computer vision algorithms able to handle video analyses requiring smaller  
 1026 datasets without markers, such as that offered by the recently introduced DeepLabCut toolbox  
 1027 (Mathis et al., 2018; Nath et al., 2019), which has quickly become the standard tool used for  
 1028 marker-free 3D pose estimation (Figure 12). Its capabilities are based on transfer learning: the  
 1029 neural network it is based upon was pre-trained with large datasets, allowing the application of  
 1030 DL to much smaller supervised datasets (Mathis et al., 2018).

1031 Efforts are being made within the field of pose estimation to bridge gaps between biological and  
 1032 computer science expertise. This is increasingly evident in the games and animation industries  
 1033 where there is a need to model animal behaviours for games and films. Manually editing each  
 1034 keyframe can be a painstaking task for animators, thus physics-based models have been  
 1035 employed for years, such as for automatically animating horse gaits (Huang et al., 2013). In  
 1036 recent years, ML tools have been incorporated to automate the process further, such as in the  
 1037 software, WeightShift, which combines full-body physics-based animation with AI to animate  
 1038 characters (Chapman et al., 2020), or in animating the locomotion of quadrupeds using neural  
 1039 networks (Zhang et al., 2018). Another area of pose estimation which has recently benefited  
 1040 from ML is via natural language. AmadeusGPT is a natural language interface for DeepLabCut,  
 1041 which integrates pose estimation and object segmentation (Kirillov et al., 2023). With this the  
 1042 end-user can describe a query and get outputs without needing to code (Ye et al., 2023).



1043  
 1044 Figure 12: Simplified pipeline for markerless motion tracking and pose estimation from videos  
 1045 using DeepLabCut (Mathis et al., 2018). Limb-reduced skinks (Camaiti et al., 2023) are here  
 1046 used as an example of locomotion tracking.

1047 **Applications to Research in Evolutionary Morphology**

1048 AI has the capacity to transform our ability to capture morphology for evolutionary analysis, as  
 1049 detailed above. We are already seeing the implementation of AI approaches for diverse  
 1050 questions in evolutionary biology, but these barely scratch the surface of the potential  
 1051 applications of AI across the field. Below we discuss a range of topics within evolutionary  
 1052 morphology that have already benefited from AI applications, and identify key areas in  
 1053 evolutionary morphology that are ripe for development. In addition to the case studies above  
 1054 that demonstrate how AI is currently being used, we provide a table of tools (Table 1) that are  
 1055 already available for applying AI to evolutionary morphology.

1056

1057 Table 1. Currently available tools using AI for evolutionary morphology

1058 *This table will be regularly updated on [<https://phAInomics.github.io/>]*

Tool name / Library	Capabilities	Supported Data types	Programming language	Reference
Acquiring Textual Data				
NLTK, spaCy <i>(python libraries)</i>	Natural language processing (NLP). For example, it can be used for extracting scientific words/taxonomic names from Journal articles	Text	Python	(Bird et al., 2009)
TaxoNERD <i>(python library)</i>	Extracts scientific names, common names, and name abbreviations.  Can link taxa mentioned to a reference taxonomy (e.g. NCBI Taxonomy, GBIF Backbone and TAXREF)	Tabular data, text, images	Python or R	(Le Guillarme and Thuiller, 2022)

pytesseract <i>(python library)</i>	Optical character recognition (OCR) to turn images to text.	Images	Python	
Google Vision	Deep Learning Application Programming Interface to perform OCR.	Images	N/A	
Deep Learning				
PyTorch, TensorFlow, <i>(python libraries)</i>	DL frameworks.	Tabular data (arrays, matrices etc) Image based data Text Audio	Python	(Martín Abadi et al., 2015; Paszke et al., 2019)
Scikit-learn <i>(python library)</i>	Tools for classical ML. Classification methods (e.g. Support Vector Machines), clustering methods (e.g., K-means clustering), dimension reduction (e.g. PCA).	A variety of datatypes, from tabular data, to image and sound data etc.	Python	(Pedregosa et al., 2011)
PIL, scikit-image, open-cv-python <i>(python libraries)</i>	Image processing and computer vision tools. For example, thresholding, contour extraction with Snakes (Active Contour).	Images	Python	(van der Walt et al., 2014)

Monai, Biomedisa  <i>(python libraries)</i>	DL tools that are designed for processing medical images	Images, especially medical images	Python	(Cardoso et al., 2022; Lösel et al., 2020)
Image processing software				
ORS Dragonfly, Avizo-Amira, VGSTUDIO MAX	Softwares for processing and segmenting medical and cross-sectional images. AI-based segmentation methods are also supported.	Medical images	The software is not open-source; but it supports Python scripting	(Dragonfly: Comet Technologies Canada Inc., 2022; Avizo: Thermo Fisher Scientific, 2021)
3D Slicer, Imagej	Open-source softwares for processing medical and cross-sectional images. Users can add extensions such as SlicerMorph, or build their own extensions	Medical images	C++, Python, Qt	(Kikinis et al., 2013; Rolfe et al., 2021; Schneider et al., 2012)
Tools can be used in evolutionary morphology				
MeshCNN	Mesh classification and segmentation  Can be used for segmenting 3D mesh models of specimens	3D mesh models	Python	(Hanocka et al., 2019)
Detectron2 ML library	Object detection	Images	Python	(Wu and Kirillov, 2019)

	Can be used for identifying a specimen in an image.			
Segment Anything	A pre-trained segmentation tool that can generate decent segmentation results	Images	Python	(Kirillov et al., 2023)
Pl@ntNet	Species ID through identification of traits for plants	Images	N/A, input images directly to online tool (identify.plantnet.org)	("Pl@ntNet IPT," 2023; "Pl@ntNet," 2023)
FloralIncognita	Species ID and identification of traits for plants	Images	N/A, input images directly to online tool (floraincognita.com)	(Mäder et al., 2021)
Fishial.ai	Species ID and feature recognition for fish	Images	N/A input images directly to web portal (portal.fishial.ai)	("Fishial.ai," 2019) fishial.ai

Merlin Bird ID	Species ID for birds from descriptions, photographs, and sound recordings	Images Audio	N/A, input images directly to mobile app (merlin.allaboutbirds.org)	(Cornell Lab of Ornithology, 2024)
Wolfram Mathematica	Identifying type of specimen in an image Categorising traits of specimens from images	Images	Wolfram Language, C/C++, Java	(Wolfram Research, Inc., 2024) Wolfram Research, 2024
MaxEnt	Modelling taxa's ecological niches	Species occurrence data, environmental rasters	Java	(Phillips et al., 2024)

1059

## 1060 Clustering and classification

1061 Genetic data is commonly used in constructing phylogenies for extant species; however, this is  
1062 not possible in certain circumstances, including the majority of extinct taxa. Due to these  
1063 shortcomings, ML techniques using images have become widespread in the classification of  
1064 individuals into distinct species (Barré et al., 2017; Hsiang et al., 2019; Valan et al., 2019;  
1065 Wäldchen and Mäder, 2018). Current research predominantly employs CNNs (Krizhevsky et al.,  
1066 2012), which excel at extracting features from images and providing probability estimates to  
1067 assign images to specific species classes. These methods, however, only classify the species  
1068 and do not describe the relationships between classes.

1069 Some AI-based image recognition methods have sought to overcome this issue and possess  
1070 potential for phylogenetic applications, but studies so far are limited. Kiel (2021) describes a  
1071 method combining DL and computer vision approaches to train a CNN to categorise images of  
1072 bivalve species into family groupings based on “known” taxonomy. For each species image, the  
1073 algorithm estimates the probability that it belongs to one family rather than another. These



1074 probability scores are used as a proxy for morphological similarity and to construct a distance  
1075 matrix, which is in turn used to cluster the families and infer a topology. Whilst this method did  
1076 find significantly more bivalve families clustering with members of their “known” subclasses than  
1077 expected by chance, the resulting phylogeny did indicate many “unlikely” placements. When  
1078 multiple CNNs trained at different taxonomic levels were combined, the resulting phylogeny  
1079 more closely matched the expected clustering based on existing taxonomic standing.

1080 Morphometric data is also available for use in species identification, and in recent years ML  
1081 techniques such as Artificial Neural Networks (ANNs) have been employed to accurately  
1082 classify species (Salifu et al., 2022). These may be a better source of information to reconstruct  
1083 the evolutionary origins of entire clades as they are able to quantitatively measure the degree of  
1084 difference amongst individuals. However, like the image classification methods, they rely on  
1085 supervised training with taxonomic labels to assign species, introducing an inherent assumption  
1086 of phylogeny.

1087 Each of these techniques must identify distinct morphological attributes for grouping, posing  
1088 challenges for species-level phylogenies, especially for fossil taxa with limited individual  
1089 samples. Lastly, using morphological similarity as a proxy for phylogenetic placement, without a  
1090 specified model, may be prone to the effects of homoplasy and convergent evolution. Despite  
1091 these constraints, the ability to use ML algorithms to differentiate taxa based on morphology  
1092 may be useful to infer relatedness based on morphological similarity/dissimilarity.

### 1093 Species delimitation

1094 Species delimitation, opposed to classification, requires the ability to identify whether individuals  
1095 belong to a population, which in some cases may lead to new species being introduced. The  
1096 limitations of image clustering methods makes them ill-suited for this task. Instead emerging  
1097 techniques in one-class classification systems (Perera and Patel, 2019) or open set recognition  
1098 (Geng et al., 2021) offer promising avenues for extending species identification beyond initial  
1099 classifications done through image analysis. However, inherent challenges remain; these  
1100 techniques are currently used for outlier detection and would need to be adapted to establish  
1101 species.

1102 An alternative approach would be to use phenotypic traits as a basis for delimitation. Individuals  
1103 can be grouped into self-similar clusters by analysing phenotypic traits, forming the basis for  
1104 delineating populations and species (Ezard et al., 2010). Traditionally, Gaussian mixture models  
1105 (GMMs) employing a Maximum Likelihood approach have been utilised (Fraley and Raftery,  
1106 2002). However, the advent of deep Gaussian mixture models (Viroli and McLachlan, 2019),  
1107 which incorporate ML techniques, may be more suitable. These models show heightened levels  
1108 of complexity, enabling them to capture intricate relationships within data. These approaches,  
1109 combined with the increasing ability to acquire image or trait data rapidly, may allow for a more  
1110 nuanced and comprehensive understanding of taxonomy.

1111 A number of genomic species delimitation methods have been extensively used in the last  
1112 decade, including Bayesian species delimitation (BPP), which has been cited over 600 times  
1113 (Yang, 2015). In addition, unsupervised ML algorithms have been employed on genomic data  
1114 to predict clusters of individuals (Derkarabetian et al., 2019). More recently, convolutional neural

1115 networks have been utilised to build a morphology-molecule network [MMNet] that integrates  
1116 morphological and molecular data for species identification (Yang et al., 2022). However,  
1117 despite their widespread adoption and increasing applications in taxonomy, these methods do  
1118 not work when faced with species that are not present in the training set, which renders them  
1119 ineffective for identifying novel or undiscovered species.

1120 Nonetheless, DL tools can be used to detect anomalies both in labels and in species  
1121 classification. From a practical level, this can be used to assist curators in adding correct  
1122 information (as with the Knowledge Bases; Gu et al., 2023), and even one day detect new  
1123 species. One application is to use a well-trained classifier model to classify taxonomic  
1124 information (e.g., genus or species) of specimens that are being digitised. Then by comparing  
1125 the predictions and actual specimen labels, potential missing or incorrect labels can be flagged.  
1126 Similarly, this approach has been applied to the classification of species from digitised  
1127 specimens, as in Hansen *et al.* (2020) where CNNs were used to classify beetles from images  
1128 of digitised museum specimens. These models, particularly when combined with further  
1129 classification and clustering tools, such as with heatmap analysis (Hollister et al., 2023), can  
1130 one day be used to identify new species by simply scanning digitised museum collections.

1131 Similar to the accumulation of image data, many more genomic markers and whole genomes  
1132 are being sequenced today. Consequently, unsupervised or semi-supervised AI-based  
1133 integrative taxonomic tools have the potential to play a key role in furthering species discovery.  
1134 In addition to phenotypic traits and genomes, researchers are obtaining additional suites of  
1135 organismal data such as acoustics, behaviour, and ecology. AI will be key to bringing these  
1136 complex datasets together for a biologically meaningful interpretation of a 'species'.

## 1137 Phylogenies - Building Trees

1138 Evolutionary studies frequently involve tree data structures, especially phylogenetic trees. The  
1139 use of machine learning (ML) methods remains relatively uncommon in phylogenetic inference,  
1140 and research into this area is still in its infancy. Despite recent progress and potential to address  
1141 limitations of traditional methods, the extent of ML's accuracy and scalability remains uncertain.  
1142 ML algorithms can mitigate the computational costs associated with Maximum Likelihood and  
1143 Bayesian approaches, are flexible, and do not necessarily require explicit specification of  
1144 models. However, a significant obstacle for supervised methods is the scarcity of training data  
1145 for tree inference. A 'true' phylogeny is fundamentally unknowable, leading to reliance on  
1146 simulated data that may not accurately reflect evolutionary relationships. Recent reviews of ML  
1147 approaches for tree building (Mo et al., 2023; Sapoval et al., 2022) have predominantly focused  
1148 on molecular phylogenetics, leaving morphology-based phylogenetics relatively unexplored  
1149 despite its unique opportunities (e.g. incorporating fossils) and unresolved challenges. Currently  
1150 available models of morphological evolution are generally more simplistic than those that exist  
1151 for molecular evolution (Lee and Palci, 2015), though are likely more complex in reality.  
1152 However, ML could be applied to developing morphological models of evolution through  
1153 automated assessment of trait covariations (which could also be applied to studies of modularity  
1154 and integration, as noted above), changes through time using existing phylogenies, and  
1155 probabilities of key innovations versus gradual variations. This is a key area for development; at  
1156 present there are no published attempts to apply AI methods to morphology-based phylogenetic

1157 inference, or to build models to estimate morphological change through time to aid in building  
1158 those phylogenies.

## 1159 **Molecular phylogenetics**

1160 There are currently far more studies focused on applying ML methods to genetic data than to  
1161 morphological data. However, a number of approaches being tested using sequence data may  
1162 have potential for future application to morphological data. CNNs and RNNs have been  
1163 employed to infer quartet (4 taxa) topologies using simulated sequence alignments and protein  
1164 data (Suvorov et al., 2020; Zou et al., 2020). These methods can be trained to deal with  
1165 instances of extreme model violation where traditional statistical methods such as Maximum  
1166 Likelihood might fall short, and once trained, tree estimation can be very fast (Zaharias et al.,  
1167 2022). Simulated quartet experiments have been shown to outperform methods like Maximum  
1168 Likelihood, with particular success in scenarios of high substitution heterogeneities, which many  
1169 standard models struggle to account for (Zou et al., 2020). However, more recent analyses  
1170 contest this, and traditional methods have outperformed neural network methods when the  
1171 taxon number is increased above four (Zaharias et al., 2022).

1172 These methods have mostly been applied to individual sequences, but applying them to species  
1173 trees involves further complexities such as incomplete lineage sorting and introgression  
1174 (Degnan and Rosenberg, 2009; Maddison and Knowles, 2006; Suvorov et al., 2020).

1175 Restrictions of limited taxa and the complexity of species tree inference are emerging areas of  
1176 research, such as in a recent study applying generative adversarial networks (GANs) to  
1177 simulated data and seven species of fungi (Smith and Hahn, 2023). The proposed phyloGAN  
1178 model uses two networks: a generator that suggests new topologies, and a discriminator trained  
1179 to differentiate real and generated data, effectively deciding how “realistic” a proposed topology  
1180 and alignment might be. This method imitates the heuristic search employed by many traditional  
1181 methods to explore tree space for more optimal trees. PhyloGAN shows an improvement in the  
1182 number of taxa that can be considered compared to previously mentioned methods, but is still  
1183 limited compared to traditional methods, and hampered by lengthy computational times (Smith  
1184 and Hahn, 2023).

1185 Another molecular ML tree building approach is Phyloformer which computes distances  
1186 between molecular sequences in a multiple sequence alignment (MSA) (Nesterenko et al.,  
1187 2022). This method simulates trees, then uses probabilistic models of sequence evolution,  
1188 working backwards to simulate MSAs. Supervised learning is then used to train a ML algorithm  
1189 to reverse engineer the phylogeny based on an associated MSA. In the case of Phyloformer,  
1190 the algorithm estimates pairs of evolutionary distances between sequences that can then be  
1191 used to infer a tree using traditional methods such as Neighbour Joining (NJ). Phyloformer was  
1192 found to outperform standard distance-based methods, and also performed competitively  
1193 against Maximum Likelihood whilst being significantly faster.

1194 The methods described here use different degrees of ML to estimate evolutionary relationships,  
1195 either by approximating distances between taxa or by directly inferring topologies. It is not yet  
1196 clear whether they will be applicable to morphological data. Methods such as Phyloformer still  
1197 rely on models of sequence evolution. Such models are lacking in the field of morphometrics

1198 due to increased complexity and the lack of clearly defined smallest units of change across the  
1199 tree of life. This presents a challenge to the application of this framework of methods, although  
1200 morphological data could be coded into such analyses as matrices.

### 1201 **Model selection, heuristic searches, and missing data**

1202 One of the most important considerations for phylogenetics is the type of model used. However,  
1203 identifying the optimal model can be challenging. ML algorithms have recently been applied to  
1204 improve model selection methods. ModelTeller (Abadi et al., 2020) and ModelRevelator  
1205 (Burgstaller-Muehlbacher et al., 2023) are two such approaches that focus specifically on  
1206 identifying the most appropriate substitution models for a particular analysis or dataset. Whilst  
1207 both focus on molecular substitution models, their existence opens the possibility of developing  
1208 new systems for selecting morphological evolutionary models.

1209 Many phylogenetic methods (including Maximum Likelihood and Bayesian) employ heuristic  
1210 searches, where model parameters (such as tree topology and branch length) are adjusted and  
1211 the likelihood calculated for each adjustment. This method essentially explores tree space for a  
1212 set number of iterations, aiming to identify parameter combinations of increasingly higher  
1213 likelihoods. Such methods are limited by how extensive their tree search is, and as a result can  
1214 become extremely computationally expensive. ML methods are now being applied to improve  
1215 the efficiency of this process by predicting which neighbouring trees will increase the likelihood  
1216 without actually calculating the value, thereby reducing computational expense (Azouri et al.,  
1217 2023, 2021).

1218 Finally, a major challenge in both molecular and morphological phylogenetic studies is the  
1219 impact of missing data. This is particularly impactful for distance-based methods where  
1220 calculating a distance matrix is complicated by the presence of missing data in the alignments.  
1221 In the case of molecular phylogenetic studies, this refers to missing bases in sequences. For  
1222 morphological data this could be a result of incomplete specimens where certain traits or  
1223 biological structures are missing or difficult to measure or score. Previous studies have shown  
1224 that missing data negatively affects the accuracy of tree inference methods (Roure et al., 2013;  
1225 Wiens, 2006). ML methods such as PhyloMissForest (Pinheiro et al., 2022), which uses a  
1226 Random Forest approach, and two methods proposed by Bhattacharjee & Bayzid (2020), use  
1227 ML to estimate missing distance values within a distance matrix and may outperform traditional  
1228 statistical methods.

### 1229 **Phylogenetic comparative methods and evolutionary modelling**

1230 Using a phylogenetic framework to estimate the evolution of clades and traits has become a  
1231 core part of evolutionary morphology over the past few decades (Adams and Collyer 2019;  
1232 Felsenstein 1985). Analysis of trait variation across phylogenies and through time relies on the  
1233 availability of well-supported topologies and time calibration. Recent advances in genome  
1234 sequencing and big-data approaches to taxonomic sampling and trait data collection have  
1235 increased the availability of time-calibrated phylogenies. In turn, this has enhanced our ability to  
1236 reliably map the evolution of traits on phylogenies and consider phylogenetic relations when  
1237 examining relationships between traits across multiple taxa.

1238 The potential applications of AI in reconstructing trait evolution using a phylogenetic framework  
1239 have been documented theoretically. These applications include character evolution model  
1240 choice and the reliable and efficient encoding of phylogenetic information. For example, Ho et  
1241 al. (2019) demonstrated the theoretical application of ML to ancestral estimation of phenotypic  
1242 traits using a multi-task learning approach applied to Brownian Motion models of continuous  
1243 biological traits. A multi-task learning approach is an ML framework that pools data from  
1244 different tasks (Ruder, 2017). This takes the form of an algorithm able to reduce the variance of  
1245 estimators, using a penalty term that draws models closer to each other, allowing the estimation  
1246 of ancestral states of multiple characters simultaneously. This approach improved ancestral  
1247 estimations compared with Maximum Likelihood models at the expense of a slight bias  
1248 introduced in the phylogenetic estimates (Ho et al., 2019).

1249 Despite theoretical advances, there are currently no practical applications of ML approaches to  
1250 estimate trait evolution. A known issue that would benefit from an AI-based modelling approach  
1251 is the assignment of distinct rates of character evolution to different parts of a given  
1252 phylogenetic tree (i.e., King and Lee, 2015). ML would enable the simultaneous pooling of  
1253 multiple data sources, including distributions of states at the tips of phylogenetic trees, branch  
1254 lengths, node ages, uncertainty in node resolution, and hidden states, and consideration of a  
1255 wide variety of complex models that may better reflect phenomic datasets (Goswami and  
1256 Clavel, 2024). ML approaches could also facilitate the comparison of simulations across trees.  
1257 Furthermore, AI methods could account for phylogenetic relatedness in analyses of trait  
1258 correlations. In the field of bioinformatics, using DNN and Convolutional Graph Network (CGN)  
1259 architectures in phylogenetic profiling for protein interactions improved predictions (Moi and  
1260 Dessimoz, 2022). In particular, combining CGN with a graphical representation of tree topology  
1261 allowed for prediction across multiple species and could be used to predict pairwise interaction  
1262 across time. Using these deep neural network algorithms in conjunction with phylogenetic  
1263 information is currently exploratory but could potentially streamline and improve multiple aspects  
1264 of estimating trait evolution and ancestral states, allowing better modelling of the complex  
1265 factors underlying evolution on a phenomic scale.

## 1266 Function and Adaptive landscapes

1267 In evolutionary biology, adaptive landscapes are conceptual frameworks that illustrate the  
1268 relationship between the phenotype of an organism and its fitness within a specific ecological  
1269 context (Arnold, 2003; McGhee, 1999, 1980; Simpson, 1984). They provide a visual  
1270 representation of natural selection-driven trait space across the landscape of an adaptive  
1271 landscape, where peaks of specific traits reflect higher fitness compared to putative trait space  
1272 across the landscape. Over evolutionary time, genetic variation, mutation, recombination, and  
1273 natural selection drive the population towards regions of higher fitness. Utilising models of trait  
1274 diversification can be helpful in tracing adaptive peaks of species through time, adapting to  
1275 different ecological niches or responding to environmental shifts. The study of adaptive  
1276 landscapes is key both to understanding the evolutionary adaptive mechanisms giving rise to  
1277 biodiversity and predicting the future adaptive potential of species in light of anthropogenic-  
1278 driven habitat loss and climate change.

1279 Functional adaptive landscape analysis (FEA) uses the morphology and function of skeletal  
1280 elements to model landscapes (Dickson and Pierce, 2019; Jones et al., 2021; Polly et al., 2016;  
1281 Tseng et al., 2023). In palaeontology, functional adaptive landscapes commonly employ FEA as  
1282 a functional metric (Deakin et al., 2022; Polly et al., 2016). ML algorithms can replace FEA to  
1283 predict the behaviour of a beam in a one-dimensional system if the algorithms are first trained  
1284 on initial FEA. ANNs have been suggested to provide more accurate FEA results than boosting  
1285 regression trees or Random Forest ML algorithms (Vurtur Badarinath et al., 2021). Furthermore,  
1286 ML algorithms could assist in the morphometrics (Baylac et al., 2003; Punyasena et al., 2012)  
1287 used in adaptive landscapes in addition to modelling adaptive landscapes through evolutionary  
1288 time.

1289 Additionally, AI has been increasingly applied to FEA-based biomechanical modelling  
1290 (Galbusera et al., 2020; Mouloudi et al., 2021). These techniques can be applied to data  
1291 extracted from static images, 3D-image data (Galbusera et al., 2020), and even motion capture  
1292 (Mouloudi et al., 2021). The isolation of distinct features (image segmentation) and the capture  
1293 of locomotory information (e.g. through pose estimation) can both be automated through  
1294 computer vision, which allows the identification of parts of interest and their spatial relationships  
1295 to one another. Once features have been extracted, AI can be used to simulate their behaviour  
1296 in relation to one another under a given set of physical constraints (e.g. Liu, 2019). This is  
1297 particularly useful for the creation of models of the range of appendicular motion, relationships  
1298 between internal organs, and even models of cytokinesis (Huiskes and Hollister, 1993; Ross,  
1299 2005; Shi et al., 2010).

## 1300 Phenome-environment and ecometrics

1301 One of the most established areas of phenotypic analysis is quantification of relationships  
1302 between phenomes of organisms (the sum of their phenotypic traits) and the environmental  
1303 context in which they evolved. The end goal of many studies using this approach is to assign an  
1304 ecomorphological characterisation to phenotypic traits and to parse their ecological signal (Barr,  
1305 2018). AI has been implemented in this field through the use of algorithms that infer present and  
1306 past ecomorphologies by reducing the dimensionality of ecomorphological data through ML  
1307 pipelines such as Random Forest analyses (Mahendiran et al., 2022; Rabinovich, 2021; Sosiak  
1308 and Barden, 2021; Spradley et al., 2019). Similarly, ML procedures have been used to  
1309 discriminate and sort phenotypes (especially morphology) based on their belonging to specific  
1310 ecomorphs or ecological guilds (MacLeod et al., 2022). These studies have highlighted the  
1311 advantages of AI-based approaches compared to standard procedures used to test the links  
1312 between morphology and ecology, such as Canonical Variate Analysis (Albrecht, 1980).

1313 The related field of ecometrics is a taxon-free approach to quantifying the distribution of  
1314 functional traits across space and time (Eronen et al., 2010). Ecometric correspondence  
1315 between environmental and phenotypic data is used to develop transfer functions which can be  
1316 used to reconstruct paleoenvironments or incorporate Species Distribution Modelling (SDM) to  
1317 model future spatial distributions of phenotypes given predicted climatic scenarios (Parker et al.,  
1318 2023; Vermillion et al., 2018). Existing work uses linear and maximum likelihood approaches to  
1319 ecometric modelling. These approaches have a limit of one or two climate inputs, normally  
1320 limiting analyses to consider only annual precipitation and mean annual temperature (Parker et

1321 al., 2023). However, a Random Forest approach would enable the model to use any number of  
1322 climatic variables. Similarly, SDMs can be built using CNNs, capturing non-linear  
1323 transformations across multiple variables (Botella et al., 2018). DL approaches to quantifying  
1324 phenome-environment would enable models to better approach the complex factors contributing  
1325 to climate and trait distribution, as in studies of trait evolution.

## 1326 Niches and Niche Evolution

1327 ML algorithms, including Boosted Regression Tree and Random Forest, have become standard  
1328 methodologies for modelling the ecological niches of taxa and, by extension, their potential  
1329 spatial distribution. Over the past decade, research has extensively focussed on predicting the  
1330 ecological effects of climate change by using ecological niche modelling (Deb et al., 2020;  
1331 Karuppaiah et al., 2023; Qin et al., 2017; Tang et al., 2021). The most prominent ML model in  
1332 this area is the 'maximum entropy modelling method (MaxEnt), which has been applied in  
1333 thousands of studies since its description in 2006 (Phillips et al., 2006; Merow et al., 2013).

1334 MaxEnt's ubiquity in scientific literature is in part due to the algorithm requiring relatively few  
1335 inputs (only species occurrences and geographic data) and relying on biologically reasonable  
1336 assumptions. It assumes that a taxon will occupy as large an area as possible (maximum  
1337 distribution entropy; Elith et al., 2011; Phillips et al., 2006). These limitations have also produced  
1338 an abundance of literature critiquing and subsequently optimising MaxEnt's statistical  
1339 assumptions and processes (Campos et al., 2023; Cobos et al., 2019; Low et al., 2021; Sillero  
1340 and Barbosa, 2021).

1341 Studies that use MaxEnt or other ML methods tend to consider niches as static entities, with  
1342 many publications 'projecting' the same niche onto environmental rasters representing distinct  
1343 points in time, sometimes thousands or millions of years ago (Saupe et al., 2019). Niche  
1344 evolution studies have instead relied on measuring the contemporary niche overlap of different  
1345 taxa (usually via the methodology of Broennimann et al., 2012), considering the similarities and  
1346 differences within a phylogenetic context (Doré et al., 2023; Padilla-García et al., 2023;  
1347 Vasconcelos et al., 2023). While both approaches are useful in understanding ecological  
1348 evolution across time, they are limited by their discrete temporal sampling – niches change  
1349 continuously across space and time, and an individual niche of a taxon may also change over  
1350 time.

1351 ML methods could be developed to identify and accommodate niches changing over time.  
1352 Taxon occurrences sometimes have associated temporal metadata, which could be used by an  
1353 AI tool to predict the continuous changes in a niche in the recent past or near future. This could  
1354 prove especially invaluable in studying the effects of climate change at a higher resolution.  
1355 Considering a geological timescale, the predicted ecological niches of fossil taxa (modelled with  
1356 environmental data representing periods in deep time) could be used to calibrate and, thus,  
1357 further validate continuous niche evolution models across phylogenetic trees.

## 1358 Prospectus

1359 The scope of evolutionary biology is immense, involving the history of life on Earth over the past  
1360 >3 billion years. For the vast majority of species that ever lived, the only available data is

1361 morphological in nature; thus, studying morphology is crucial for understanding the evolution of  
1362 organisms. Yet, methods for capturing morphological data remain largely manual, presenting a  
1363 bottleneck for the study of morphological evolution, particularly in comparison to other biological  
1364 fields with mature methods for 'Omics' level analyses. The use of AI is bringing about a massive  
1365 transformation in the field of evolutionary morphology, both for data capture and analysis.  
1366 Integrating AI techniques into this area will become increasingly important as the field continues  
1367 to move towards larger-scale analyses and bigger data.

1368 As we have discussed, AI has been successfully applied to a range of data acquisition for  
1369 evolutionary morphology, and AI applications are only increasing in the pace of development  
1370 and accessibility for non-experts. For example, AI is already making it quicker to generate,  
1371 refine, and access image data of larger quantities and/or greater resolutions than ever before.  
1372 Large gaps remain, however, including discriminating features or regions of interest, extracting  
1373 discrete traits or 3D morphometric data in datasets with large amounts of variation (which are  
1374 common in comparative evolutionary analysis), and in applying AI for improving evolutionary  
1375 models for morphological data. These areas should be the focus of efforts over the coming  
1376 years. While we have detailed applications of AI to several research areas involving  
1377 morphological evolution, there are many more for which AI has yet to make a significant impact.  
1378 Below, we note a few subfields of evolutionary morphology that have clear pathways for  
1379 improvement through AI. Finally, we close with some considerations on the accessibility and  
1380 environmental effects of AI.

## 1381 Emerging fields

1382 **Retrodeformation** - Several studies have demonstrated that fossil data are critical for  
1383 accurately estimating phenotypic evolution through deep time (Slater et al. 2012; Goswami and  
1384 Clavel, 2024 and references therein). A common challenge in palaeontology is encountering  
1385 fossils which have undergone taphonomic distortion via brittle or plastic deformation (Kammerer  
1386 et al., 2020; Schlager et al., 2018). This can severely hamper attempts to assess and quantify  
1387 intra- and interspecific shape by introducing non-biological variation, and for this reason, as well  
1388 as the lack of integration in phylogenetic analyses as noted above, fossil data are often  
1389 excluded from comparative analyses. Retrodeformation is the process of restoring the original  
1390 shape of an object by reversing this taphonomic distortion (Herbst et al., 2022; Lautenschlager,  
1391 2016). While landmark- and symmetry-based procedures to manually perform these operations  
1392 are available (e.g. Morpho, Schlager et al., 2018), they are time-consuming and can only be  
1393 applied to relatively small datasets, restricting the taxonomic breadth of studies. AI provides an  
1394 opportunity to automate and enhance this process. ML models, such as neural networks, can be  
1395 trained to recognize and correct specific types of deformations. These models can learn  
1396 patterns of distortion and apply appropriate corrections. In the future, AI may aid in the  
1397 reconstruction of 3D objects or scans of distorted or even completely flattened fossils, helping to  
1398 recover valuable 3D morphology. Once models have been trained on a dataset of naturally  
1399 distorted fossils and manually performed retrodeformation simulations, they can be integrated  
1400 into software applications or embedded in hardware systems for real-time correction and  
1401 analysis. The choice of AI techniques and algorithms will depend on the specific application and



1402 the nature of the deformations to be corrected. For instance, de Oliveira Coelho (2015) used  
1403 logistic model trees to predict the temperature at which human bone was burnt. Likewise, Zeng  
1404 *et al.* (2021) used a support vector machine algorithm to detect small geological faults. Such  
1405 methods could be co-opted to estimate the extent of brittle and ductile deformation a fossil has  
1406 undergone, which then enables evolutionary morphologists to apply the opposite forces to  
1407 correct the distortion.

1408 **Histology** - Histology examines the microscopic structure and morphology of tissues, including  
1409 fossil tissues in palaeohistology. Palaeohistology has historically informed on growth,  
1410 physiology, and development, but is also increasingly used to investigate the form and function  
1411 of tissues (e.g. the function of duck-billed dinosaur dental batteries; Bailleul *et al.*, 2019, 2012).  
1412 AI tools have greatly advanced histology, especially in the sub-field of histo-pathology, to better  
1413 cancer recognition and clinical oncology (reviewed in Shmatko *et al.*, 2022). AI has been  
1414 proposed to be a promising avenue to increase throughput for pattern recognition. Some areas  
1415 where AI pattern recognition has already been explored in biological research are in quality  
1416 assessment of histological images (Haghighat *et al.*, 2022) and herbivore diet characterisation  
1417 through micro-histological analysis (Filella *et al.*, 2023). Additionally, DNNs have been used to  
1418 identify primary and secondary osteon regions and create segmented maps of different osteon  
1419 regions. This osteon segmentation was combined with phylogenetics to elucidate the  
1420 developmental pathway towards miniaturisation in the theropod dinosaurs Alvarezsauria (Z. Qin  
1421 *et al.*, 2022). There is significant potential for the use of AI in histological studies in the context  
1422 of evolutionary morphology and is therefore an avenue for future exploration.

1423 **Genome-phenome mapping** - AI has been applied in two main areas of genome phenome  
1424 association (GPA): the medical sciences, and food production. This is not surprising, as both  
1425 are umbrella areas of research with high societal impact. Deep matrix factorization (DMF)-based  
1426 methods developed to handle multi-omics data have been successfully applied to improve  
1427 genome-wide mapping and genome-wide association studies in the context of molecular  
1428 phenomes. These include disease susceptibility (Long *et al.*, 2023; Mieth *et al.*, 2021), drug  
1429 efficiency (Mongia and Majumdar, 2020), crop phenotype prediction (Islam *et al.*, 2023), and  
1430 microbe-disease association (Y. Liu *et al.*, 2021). More recently, a multi-omics data fusion-  
1431 based approach (Weighted Deep Matrix Genome Phenome Association) has been proposed to  
1432 incorporate different kinds of omics data and to predict potential nonlinear GPAs with functional  
1433 traits (Tan *et al.*, 2022). However, for non-model organisms and evolutionary research, AI is  
1434 underutilised either through GPAs or genome-wide association studies (GWAS). These fields  
1435 are rapidly evolving with the increasing amounts of data collected worldwide, and therefore  
1436 provide promising avenues for implementing new AI algorithms in the near future.

1437 **Evo-devo** - ML has been successfully applied to the study of gene expression in embryonic  
1438 development of model organisms (Čapek *et al.*, 2023; Feltes *et al.*, 2018; Naert *et al.*, 2021).  
1439 Algorithms have also been developed to aid in phenotyping and staging embryos and to  
1440 recognize diseases and malformations (e.g. Al-Saaidah *et al.*, 2017; Jeanray *et al.*, 2015). In  
1441 evolutionary developmental biology (evo-devo), phenotype identification is a recent  
1442 development. A few pilot studies have been conducted using both images and morphometrics  
1443 data on human cells, model organisms and plants (Cai and Ge, 2017; Chen *et al.*, 2020;

1444 Masaeli et al., 2016). CNNs have been used to extract visual patterns from images, to aid  
1445 embryo staging, and to analyse changes in phenotype during ontogeny (Feldes et al., 2018;  
1446 Naert et al., 2021).

## 1447 Accessibility and Considerations

1448 Until very recently, most AI models were built and applied using Python libraries such as Caffe,  
1449 TensorFlow, and PyTorch (Jia et al., 2014; Martín Abadi et al., 2015; Paszke et al., 2019),  
1450 requiring both AI and programming knowledge. Additionally, running these models required  
1451 specialised, expensive hardware, such as GPUs, which are commonly used in training AI  
1452 models. Consequently, the required level of expert understanding of AI and costly hardware  
1453 restricted the accessibility of AI for many researchers in the biological sciences.

1454 As AI continues to advance, it is becoming increasingly accessible to non-experts and more  
1455 affordable to implement due to several factors. (i) Increasingly user-friendly software has  
1456 reduced the need for in-depth AI-related knowledge. (ii) The growth of open-source and pre-  
1457 trained models has significantly reduced the computational resources, data, and time required  
1458 to develop AI models. (iii) The advent of cloud-based AI services has allowed researchers to  
1459 access powerful AI without investing in local GPUs. In addition, the cost of robotic arms  
1460 decreases annually (Zhang et al., 2022), meaning that large datasets capturing phenotype with  
1461 high resolution are increasingly available.

1462 Despite these advancements, there are certain aspects that require a degree of caution. AI  
1463 outputs are derived from the data used for training. If the data is biased or unrefined, it could  
1464 lead to similarly inaccurate and biased results (Mehrabi et al., 2021; Zhang et al., 2022),  
1465 therefore, attention must be given to data cleaning and preprocessing.

1466 Additionally, the environmental impact of AI cannot be overlooked, particularly as many studies  
1467 in our fields aim to protect the natural world and limit human-caused climate change and  
1468 destruction of biodiversity. Evolutionary morphology studies increasingly involve the collection  
1469 and storage of large quantities of image data. These datasets are currently limited by the hours  
1470 of manual input required, but will only increase in size as AI approaches allow for more efficient  
1471 processing and analysis, leading to larger, more complex studies that in turn require increased  
1472 hardware and energy input. Training large-scale models can consume substantial amounts of  
1473 energy, contributing to carbon emissions, although admittedly the models trained and used in  
1474 evolutionary biology are unlikely to be as large as those from tech giants like Google, Meta and  
1475 OpenAI. Some studies using large scale genetic datasets have estimated the carbon footprint of  
1476 their computational analyses (Philippe et al., 2019; Y. Qin et al., 2022). More formal approaches  
1477 to sustainable computer science are being developed in the form of emission calculation tools  
1478 (Lacoste et al., 2019; Lannelongue et al., 2021), assessments of their suitability for various  
1479 approaches (Bouza et al., 2023), and proposed principles for greener computational science in  
1480 the future (Lannelongue et al., 2023). As the scale of AI models and the demand for AI continue  
1481 to grow, it will be increasingly important for us to evaluate the environmental impact of future  
1482 studies in evolutionary morphology.

1483 To conclude, we have here provided an introduction and overview of the current and potential  
1484 future applications of AI to evolutionary morphology. As AI becomes more accessible and  
1485 tailored towards applications central to the study of evolutionary biology, we expect that it will  
1486 transform the study of evolutionary morphology. By accelerating and improving capture and  
1487 analysis of “Big Data” on phenotype for diverse comparative datasets, AI will allow the  
1488 realisation of evolutionary phenomics and launch a new phase in the study of past and present  
1489 biodiversity.

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## 1506 Data availability statement

1507 No new data were generated or analysed in support of this research. The tools table in this  
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## 1509 Competing interests statement

1510 We declare no competing interests.

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