



Is there a role for bone tissue in osteoarthritis?

Osteoarthritis (OA) is a major health burden in our ageing societies. Our comprehension of this complex musculoskeletal disease has shifted from one affecting a single tissue, the articular cartilage, to a whole organ failure that affects different tissues including bone and the synovial membrane. This disease affects more women than men, yet we still do not know the underlying causes of this discrepancy. Indeed, a number of factors are involved in OA pathophysiology and progression. However, in recent years the key role played by the subchondral bone tissue in OA has been underscored, yet mechanisms leading to this still remain unknown. This article explores how bone and, in particular, the subchondral bone tissue is modified in OA, and which mechanisms could be responsible for the alterations observed.

KEYWORDS: bone/cartilage cross-talk ■ bone marrow lesions ■ mineralization
■ osteoarthritis ■ subchondral bone

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Osteoarthritis (OA) is characterized by progressive articular cartilage loss, appositional new bone formation and sclerosis of the subchondral trabeculae and growth plate, formation of osteophytes, and an imbalance between loss of cartilage due to matrix degradation and an attempt to repair this matrix [1–3]. Synovitis is often observed and is considered to be secondary to the changes in hard tissues within the joint. *In situ* structural changes in subchondral bone during the course of OA can now be readily observed using imaging techniques. Indeed, increased subchondral bone activity, as judged by enhanced uptake of technetium-labeled diphosphonate, can predict cartilage loss [4], and cartilage lesions do not progress in the absence of significant subchondral activity. MRI revealed the presence of bone marrow lesions (BMLs) in OA patients, which increased in size gradually over time [5–7]. Using this technology, the presence of edema-like lesions in subchondral bone marrow and bone attrition were found to be strong indicators of bone turnover, as well as structural deterioration in knee OA. BMLs not only predict increases in knee cartilage loss in patients with knee pain, but even in patients without knee pain [5]. BMLs are characterized by sclerotic bone that is undermineralized [8]. Risk factors for OA in humans include age, gender, genetic predisposition, mechanical stress and/or joint trauma, and obesity [9], factors also affecting BMLs [5,6,8,10–13].

What is the importance of subchondral bone in OA?

Our comprehension of OA has been hampered by the nature of the disease with its slowly progressive

and multifactorial nature, and its periods of active disease followed by remission. Therefore, our knowledge of the etiology, pathogenesis and progression of this disease remains incomplete. However, in recent years, our focus has evolved from a disease affecting only cartilage, with attempts to repair this loss or damaged cartilage, to one of a heterogeneous disease involving all the articular tissues including cartilage, subchondral bone, menisci and periarticular soft tissues such as the synovial membrane. Synovitis, although considered to be secondary to the alterations in other joint tissues, could also be a component of the early events leading to the clinical stage of the disease.

Changes in bone tissue in OA have long been considered secondary to cartilage degradation, yet it is now suggested that the modifications of the subchondral compartment is one of the causally most significant pathophysiological events occurring in cartilage. Indeed, subchondral bone alterations may actually precede cartilage changes as assessed in different animal models [14–20]. The remodeling of the OA subchondral bone is now a key event in OA and, in addition to appositional new bone formation and sclerosis, we now know that phases of resorption are also important [21,22]. Moreover, imaging studies revealed that differences in the shape of the femoral head actually preceded manifestations of clinical OA [23]. Accumulating data from MRI now clearly indicate that two subgroups of patients can be observed, fast or slow progressors, in whom BMLs progress either rapidly or slowly [24–26]. Data from *in vitro* studies also indicate that subchondral bone tissue

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isolated from OA patients is not uniform [27–29]. Indeed, *in vitro* studies have shown that some features of human primary OA osteoblasts can discriminate two sub-groups of patients either presenting normal or high prostaglandin E₂ levels [27,28] and that osteoblasts prepared from non-sclerosing and sclerosing areas of tibial plateaus of OA patients also show differentially altered features [30–32]. Moreover, indices of bone resorption can also discriminate patients with progressive knee OA from those who are nonprogressing OA patients [4,33]. This could be key evidence, since a study in a mouse model of OA recently described that inhibition of bone resorption reduced indices of OA in those mice showing high bone remodeling [34]. Evidence obtained using micro-computed tomography indicates an altered microarchitecture of the OA bone with trabeculae showing more plate-like structures than rod-like structures [35,36]. Such structures lead to increased bone stiffness.

What are the causes of abnormal subchondral bone remodeling in OA?

The progression of joint cartilage degeneration is associated with intensified remodeling of the subchondral bone and increased bone stiffness [37]. OA patients have high BMI, a better preserved bone mass [38–41], independent of body weight [42], and increased bone mineral density (BMD), suggesting that new bone synthesis exceeds degradation in OA, which could be viewed as a failed attempt at bone formation [43]. Studies have also revealed that OA bone tissue shows numerous microfractures [44–47]. Healing of trabecular microfractures in OA subchondral bone could generate a stiffer bone that is no longer an effective shock absorber [48,49]. This hypothesis, although attractive, was never demonstrated. However, recent evidence has indicated that OA bone tissue actually shows signs of increased microfractures compared with normal bone tissue and this was used as an indication that OA bone tissue may experience more fracture healing without reaching full maturity, a situation that would alter OA bone tissue composition and mechanical integrity [50]. Moreover, a very recent study indicated that excessive mechanical stress on isolated OA osteoblasts actually increase their capacity to alter chondrocytes in a co-culture system *in vitro* [51], implying that increased mechanical stress or increased stiffness of OA subchondral bone could alter the integrity of the overlying articular cartilage. In addition, subchondral bone stiffness may be part of a more generalized bone alteration, leading to increased apparent BMD or volume, and

the association between osteophytes and femoral BMD indicates that a primary attribute of bone formation may underlie the pathophysiology of OA [52]. This also agrees with the recent hypothesis of a problem with growth of bone cells proposed by Aspden as opposed to a problem of decay [50]. IGF-I and -II, and TGF- β levels are higher in iliac crest bone biopsies of patients with OA [53]. Since the iliac crest is not a weight-bearing joint and is distant from any of them, this suggests that OA is a generalized bone metabolic dysfunction. However, stiffness and BMD are not uniform in OA bone [54–56]. The bone closest to the articular cartilage has the greatest effect on cartilage integrity, and variations in stiffness and BMD at this site in OA bone are probably causing more damage to cartilage than any of these parameters under normal conditions [57,58]. Increased osteoid volume is often more severe than cartilage changes in animal models of spontaneous OA [14–20], and the severity of cartilage fibrillation and loss generally exceeds bone changes only in advanced OA [14]. A recent study also provided contrasting data on the link between bone area and medial and lateral cartilage defect, whereas subchondral BMD was linked with medial defect but not cartilage loss, indicating that multiple mechanisms present in subchondral bone could lead to cartilage loss in older OA individuals [59].

The sum of these data seems to suggest that OA bone tissue is inappropriate and should show altered composition and/or features. Indeed, explants of the femoral head of OA patients at autopsy showed a lower mineralization of bone tissue than is normal [60–63]. Therefore, the apparent increase in BMD observed in OA patients may be due to an increase in material density, not an increase in mineral density. BMLs, consisting of edema-like lesions and cysts in subchondral bone, observed using MRI, are one of the hallmarks of knee OA [24,64]. BMLs are strong indicators of bone turnover and of progressive structural changes in knee OA patients. Felson *et al.* reported a strong correlation between bone marrow edema, the former description of BMLs, and pain in OA patients, but not with the severity of pain. In a longitudinal study, limb alignment and bone marrow edema were also shown to be related [65,66]. However, we must be cautious interpreting BMLs as they can be identified in patients without reported knee OA, whereas BMLs show a complex relationship with OA, obesity, dietary habits and bone mechanics [5,10,67–71]. Medial BMLs were mainly observed in OA patients with varus limbs, whereas lateral lesions were seen mostly in patients with valgus

limbs. Notwithstanding the adjustment for misalignment, bone marrow edema lesions were still strongly associated with radiographic progression. BMLs are also associated with poorly mineralized sclerotic bone tissue in OA patients [8]. This increased, undermineralized osteoid matrix is due to an increase of the ratio of $\alpha 1$ to $\alpha 2$ chains in OA compared with normal tissue [61,62,72,73]; a situation we and others also observed in human OA osteoblasts *in vitro* [74] and which was linked with elevated TGF- $\beta 1$ levels in these cells [27,74]. The control of skeletal patterning and tissue remodeling involves a number of signaling molecules, and in particular, members of the bone morphogenetic protein, TGF- β superfamily and Wnts [75–84]. A potential role for Wnts in OA pathophysiology has been proposed based on elevated circulating Dickkopf-related protein 1 (DKK1) levels in hip OA patients that corresponded to OA grade [85], therefore implying that reduced Wnt/ β -catenin signaling would be present in OA since DKK1 is an antagonist of this pathway [86,87]. The low-density lipoprotein receptor-related protein (LRP)5 locus on chromosome 11q was recently associated with OA susceptibility following genome-wide scans. Mutations of *LRP5* have previously been associated with abnormal bone mass regulation and could be the cause of the abnormal bone tissue mineralization and remodeling observed in OA patients. Although no individual polymorphisms were found in a study of 187 individuals, an altered haplotype of *LRP5* was identified that increases the risk of OA by 1.6-times [88]. Zhu *et al.* recently demonstrated a key role of both increases [89] and decreases [90] of the Wnt canonical β -catenin pathway in mouse cartilage in the development of OA-like features. Hence, whether the Wnt/ β -catenin signaling pathway is involved in OA will need more substantial evidence both from basic science and clinical studies. In addition, although *LRP5* has been exclusively associated with the canonical Wnt/ β -catenin signaling pathway in bone, recent studies also suggest that it could be involved with a skeletal role of gut-derived serotonin signaling in osteoblasts, osteocytes and osteoclasts [91,92]. If demonstrated in OA, this could be very attractive as serotonin mediates central and peripheral effects that could be linked with bone remodeling, which is altered in OA.

Hypotheses to explain the role of bone in OA have been proposed. Indeed, an inappropriate attempt to form and/or repair the subchondral bone tissue could lead to altered cartilage remodeling/degeneration and synovitis [93]. Since an increased BMI in OA patients is a risk factor,

it was also proposed that OA could be a systemic disorder of stromal cell differentiation and lipid metabolism [94]. Recent observations of BMLs in OA [95–97], the increased risk of BMLs in the presence of dietary saturated lipid levels [10], and the fact that bone marrow cells show a deficit of chondrocytes and adipocytes yet increased osteogenesis would support this view [98]. In addition, the fact that leptin levels are high in the synovial fluid and sera of patients also agrees with a role of abnormal lipid metabolism [99–101]. Lately, Aspden proposed yet another hypothesis, in which OA would be a pathological growth, not decay, problem with excessive and poorly regulated growth of musculoskeletal tissues [50]. Cells would revert to an abnormal developmental phenotype with a loss of proper function such that tissue integrity could never be attained. The observation that OA osteoblasts grow at a faster rate than normal cells [30], their reported increased rate of proliferation [102] or their reduced apoptosis [102,103] would support this hypothesis. The abnormal phenotype of OA osteoblasts, as observed in a number of studies [27,28,30–32], also indicates abnormal development of these cells, with the ultimate differentiation parameter, namely mineralization, never fully attained in OA bone tissue [61,62,72]. This abnormal mineralization was also observed *in vitro* and was linked with abnormal type 1 collagen production in response to elevated TGF- $\beta 1$ levels in these cells [74]. Moreover, abnormal responses to parathyroid hormone, prostaglandin E_2 , IGF-1 and TGF- $\beta 1$ have all been observed in OA osteoblasts, also suggesting an abnormal development of these cells, yet we still do not have any clues as to why the response to growth factors, hormones or eicosanoids is altered in these cells. Hence, the latter hypothesis is very attractive and deserves careful consideration.

Recent evidence also links leptin with OA pathophysiology [99,100,104], again supporting a hypothesis proposed by Aspden [94]. Here, centrally controlled bone resorption via leptin, an adipocytokine produced by adipocytes, and local modulation by adrenergic $\beta 2$ receptors in osteoblasts [105,106], would be altered in OA. In addition, local leptin production by OA osteoblasts [102] could affect both osteoblasts and chondrocytes, whereas leptin production by chondrocytes would also affect chondrocytes via autocrine/paracrine interactions [104]. In addition, a recent study clearly showed that a link exists between leptin responsiveness of chondrocytes and BMI in OA patients [107]. This would, in turn, suggest that not all OA patients may

respond similarly to local leptin delivery. OA osteoblasts are also very sensitive to leptin, as we recently showed that it can alter the phenotype of these cells and their proliferation [102].

Could OA be considered as a systemic bone disorder? A number of data would support this notion. Indeed, OA patients show increases in BMD, yet analyses of their bone tissue show reduced bone mineral content and increased osteoid, in addition to alterations in subchondral bone microstructure. The progression of joint cartilage degeneration is associated with intensified remodeling of the subchondral bone and increased subchondral bone stiffness [37]. Alterations of bone formation and resorption indices have been described. Indeed, the group of Gevers and Dequeker was the first to demonstrate altered composition of bone tissue in OA with bone explants from non-weight-bearing areas. They reported elevated serum osteocalcin levels in women with hand OA, and elevated osteocalcin in cortical bone explants [108]. The levels of IGF-1, IGF-2 and TGF- β , were also found to be elevated in samples of iliac crest bone of patients with OA [53].

Inasmuch as OA is associated at a later stage with a thickening of subchondral bone, bone explants of the femoral head of OA patients at autopsy actually showed a low mineralization pattern compared with normal bone explants [61,63,109]. An increase in material density could explain the apparent increase in BMD in OA patients since there does not seem to be an increase in mineral density. Indeed, bone tissue mineralization in OA is lower than normal and even lower than in osteoporosis [110]. By contrast, the increase in material density is based on an increase in type I collagen production, which, combined with an increase in the ratio of type I collagen α 1 to α 2 chains in OA compared with normal tissue, would explain the undermineralization [72,74,111]. Indeed, a two- to threefold increase in the expression of COL1A1 chains of type I collagen, together with no variations in COL1A2 expression in OA osteoblasts, leads to an increase in the production of collagen type I α 1 chains and this abnormal ratio. Together with the reduced number of cross-links in OA bone tissue [61], this could explain the reduction in bone mineralization. Other features of mature osteoblasts, such as increased levels of osteocalcin and alkaline phosphatase, have been reported for OA osteoblasts [30,112]. Therefore, both features of terminal differentiation and mineralization of OA osteoblasts are altered.

Besides modification of BMD, microdamage to bone tissues, such as microcracks and sub-microscopic cracks, can contribute to loss of bone

quality [113], a key factor for the progression of OA. Indeed, the accumulation of microdamages to bone is directly related to OA [114]. Since normal bone and articular cartilage are good shock absorbers [115,116], subchondral bone stiffening in OA tissue could increase trabecular bone strain in both the proximal tibial plateau and distal tibia [117–119]. In patients already showing compromised articular cartilage, this increased strain could then lead to subsequent cartilage lesions. Indeed, evidence suggests that increased stiffness leads to subchondral bone sclerosis in OA and not an increase in BMD [63].

Increased bone mass observed in OA individuals could be related to normal cell numbers producing more collagen, more cells producing similar amounts of extracellular matrix components or increased cell numbers producing more collagen. The exact mechanism(s) in place still remain poorly understood, yet evidence to date indicate that more cells are producing more collagen per cell [62,63,74]. Uncoupling of bone remodeling processes, bone formation and bone resorption could also explain this observation. The molecular mechanisms locally involved in the bone remodeling process include the coupling between osteoblasts and osteoclasts. The molecular triad receptor activator of nuclear factor- κ B ligand (RANKL)/RANK/osteoprotegerin (OPG) emerged as playing essential roles not only in bone formation, but also in bone resorption. RANKL, a member of the TNF ligand family and produced by osteoblasts, binds to its specific receptor RANK on osteoclast precursors, promoting their differentiation and fusion into mature osteoclasts, and on mature osteoclasts to promote their activity. On the other hand, OPG acts as a decoy receptor for RANKL, preventing the recruitment, differentiation and fusion of osteoclasts. Bone remodeling is, thus, kept in equilibrium via the interplay of OPG and RANKL [120]. The ratio of OPG to RANKL in bone tissue, produced by osteoblasts, controls bone resorption under normal conditions. Studies using both *ex vivo* explants and *in vitro* osteoblasts have described modifications of the OPG:RANKL ratio in OA [121–125]. Of interest is the observation that this ratio was reduced in a subpopulation of OA patients, suggesting increased subchondral bone resorption, and increased in another subpopulation, favoring bone formation [124].

The control of osteogenesis in bone marrow appears to be regulated locally, at least in part, by Wnt agonists and antagonists produced by osteocytes [126,127]. Such antagonists include members

of the DKK family (DKK1 and 2) [86,87,128] and sclerostin [129]. DKK1 is a master regulator of osteogenesis, and has opposite effects on early and late osteoblast development [86,87]. DKK2 controls terminal differentiation of osteoblasts and mineralization [128]. The Wnt signaling pathway may play a role in OA, but puzzling contradictory results have been published using animal models [89,90], whereas, in human studies, a potential role has been ascribed to DKK1 in advanced hip OA [85], and specific polymorphisms of the LRP5, LRP6 and FRZB (key receptors for Wnt signaling) have been described [130]. In addition, our own results indicated altered Wnt signaling in isolated OA osteoblasts and abnormal levels of DKK2 and sclerostin [131,132].

How can abnormal bone tissue features in OA alter cartilage integrity?

■ The bone/cartilage cross-talk issue

In order for two tissues to exchange information or have an ongoing cross-talk, a route of communication must be present between them. Although the subchondral bone is richly vascularized, it was a long-held belief that the hyaline cartilage is not. This, however, is now challenged by histochemical studies demonstrating that the deep layer of hyaline cartilage is also vascularized. This implies that the hyaline cartilage can be nutritionally supplied via the subchondral bone as well as by the synovial fluid. Therefore, microvascular damage affecting the venous circulation in the bony tissue may cause alterations of chondrocyte function [133], but whether they are secondary to bony changes or the primary cause of bone changes in OA has not been investigated. A correlation between OA and cardiovascular disease risk factors exists [134–136], whereas the abnormal vascularization of OA tissues could initiate cartilage tissue damage [137]. Moreover, Conaghan *et al.* proposed that OA could be an atheromatous vascular disease [138]. Leptin increases arterial wall thickness, decreases vessel distensibility and elevates C-reactive protein levels [139], thereby contributing to abnormal vascular function in OA, a situation that would agree with the hypothesis of Conaghan *et al.* [138].

As the presence of the tidemark between articular cartilage and subchondral bone was believed impermeable, it was thought that chemical exchanges could not exist between the two tissues. However, cross-talk between cartilage and subchondral bone is now considered an integral part of the disease

process [54,140,141]. Radin and Rose first suggested a possible role for subchondral bone in the initiation and progression of cartilage degeneration, since increases in bone mass and thickness might modify biomechanical properties that favor the appearance/progression of structural changes in the articular cartilage [49]. Indeed, the progressive structural changes experienced by the subchondral bone as the disease progresses are now considered to be part of the disease process [15,16,109,142,143]. In turn, these changes include biochemical pathways involved in both bone and cartilage tissue homeostasis and could contribute to cartilage degradation [27,30,31,53,61,144–147].

A number of studies have also reported that chondrocyte differentiation can be modified by factors secreted by osteoblasts [31,32,146,148,149]. Hence, locally produced cytokines/growth factors/eicosanoids could diffuse from subchondral bone tissue through the bone–cartilage interface and stimulate cartilage breakdown. Channels and fissures between cartilage and bone [46,47] could allow the diffusion of biological signals between the two compartments [150–152]. Microcracks have also been described in the calcified layer of aging articular cartilage [44,152], which could allow the transfer of humoral information from the subchondral bone region to the basal layer of cartilage. Pan *et al.* recently tested this hypothesis directly by measuring *in situ* sodium fluorescein (376 Da) diffusion from the subchondral bone region to the articular cartilage in mice, using a novel imaging method based on fluorescence loss induced by photobleaching [153]. Their results suggest that this long sought-after cross-talk between the two tissues exist, and that they form a functional unit with both mechanical and biochemical interactions. More importantly, a recent study also raised the possibility that mechanical constraints also influence the features of isolated osteoblasts. Indeed, applying a high-magnitude cyclic tensile stress of 15 kPa on isolated osteoblasts from porcine mandibular condyles modified their capacity to generate factor(s), which, in turn, disrupted chondrocytes in co-culture systems. These chondrocytes showed altered type II and type X collagen, aggrecan, and cartilage oligomeric matrix protein production, and increased matrix metalloproteinase-1, -3 and -13 genes, reminiscent of alterations observed in OA chondrocytes [51]. OA osteoblasts obtained from sclerotic and nonsclerotic areas of tibial plateaus were shown to have different features [27,30–32,111] and affect chondrocytes differently in

co-cultures [31,32,146,154]; this suggests that altered features of human OA osteoblasts could further change as mechanical pressure increases. Therefore, the progressive alteration of the bony tissue and articular chondrocytes in OA could be explained by both biomechanical and biological factors. This could then bring together the hypotheses of altered OA osteoblasts producing putative factor(s) affecting articular cartilage, disturbed mechanical forces and joint malalignment, creating these altered mechanical forces into a global concept of altered bone tissue in OA, leading to inadequate articular cartilage support, and, ultimately, failure of the joint.

Future perspective

As an increasing amount of data uncover the role played by bone tissue in OA initiation and/or progression, efforts should be put forward to determine the key mechanisms involved in

altered bone remodeling. Indeed, new therapies to treat OA should target both the articular cartilage and bone remodeling. Moreover, since recent studies have suggested a role of BMLs in the initiation/progression of OA, special care should be taken to determine the causes of these lesions. Most importantly, we need to know how these lesions relate to either pain, altered tissue integrity or altered bone biomechanics.

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Executive summary

Key factors involved in osteoarthritis

- Osteoarthritis (OA) is considered a whole-joint organ failure.
- OA involves modifications of the articular cartilage, the synovial membrane, the bone and subchondral bone tissues, and the bone marrow.
- Bone tissue changes in OA include increased bone mineral density, reduced bone mineral content, increased osteoid tissue; yet reduced mineralization, increased incidence of microfractures, and increased bone marrow lesions.
- OA incidence and progression are linked with bone tissue changes, including increased bone resorption and bone remodeling.
- A cross-talk exists between the articular cartilage and the subchondral bone, which permits chemical exchanges between the two tissues.

Future perspective

- OA therapies should target both the articular cartilage and bone remodeling; as further research uncovers the role played by bone tissue in OA initiation and/or progression, efforts should be made to determine the key mechanisms involved in altered bone remodeling.
- As recent studies also indicate a role of bone marrow lesions in the initiation/progression of OA, special care should be taken to determine the causes of these lesions.

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