

人类活动对松材线虫病传播动力学的影响研究^{*}

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摘要:松材线虫病被称为“松树癌症”,能快速导致松树枯死,对经济发展和森林生态造成毁灭性危害。感染媒介天牛的迁移,是导致松材线虫病在全球扩散和暴发的关键因素。本研究基于媒介昆虫的自然传播和依赖人类活动的长距离传播,构建了一个松材线虫病的双斑块宿主-媒介耦合模型。通过下一代矩阵推导了基本再生数 R_0 ,并证明当 $R_0 < 1$ 时,无病平衡点是全局渐近稳定的,疾病最终灭绝;当 $R_0 > 1$ 时,系统是一致持续的,疾病流行。研究结果表明人类活动导致的长距离传播能够使本应无病的区域被入侵,将感染从高流行区域扩散到低流行区域。研究结果为空间协调的干预措施提供了理论依据,这些措施包括沿木材运输路线实施检疫和缓冲区管理。

关键词:松材线虫病;斑块;基本再生数;持续;灭绝

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松材线虫病是由松材线虫引起的森林病害,会使松树迅速枯萎死亡。近些年来,许多学者关注该植物病害的传播模式和有效控制策略,在通过数学建模方法阐明松材线虫病传播机制方面已取得了新进展^[1-16]。在文献[12]中,研究者将松树种群分为易感松类和感病松类,将感染媒介天牛种群分为易感天牛类和感病天牛类,建立松材线虫病的数学模型并研究了松材线虫病的传播动力学行为。文献[13]研究了一个考虑非线性发病率的松材线虫病数学模型。2024 年,Ahmad 等人在文献[14]中,在考虑控制变量和无症状携带者的假设下,建立了具有非线性发病率的宿主-媒介传播模型,通过敏感性分析和分岔分析识别了关键参数的影响。文献[15]建立了包含 6 个仓室的微分方程系统,将松树种群和感染媒介天牛种群分别划分为易感类、暴露类和感病类,精确描述了种群内和种群间的疾病传播流程。2025 年,文献[16]提出了具有非局部竞争和记忆扩散的松墨天牛-啄木鸟捕食模型,采用 Holling II 型功能反应,结合中国远安县实际森林数据进行了数值模拟,阐明了非局部竞争与记忆扩散对时空异质性的诱导机制。

上述研究虽然丰富了松材线虫病的空间动力学理论,但均未聚焦于人类活动介导的长距离传播对多斑块耦合系统的影响。现有的研究模型主要聚焦于媒介的自然传播过程,即短距离传播,这种传播通常局限于单个孤立的松林生态系统内部,往往忽视了疾病在更广阔空间尺度上传播的可能性。多项研究表明人类活动因素,包括但不限于木材的运输、森林采伐作业以及林产品的跨区域流通等行为,实际上构成了松材线虫病实现长距离传播的主要途径^[17-20]。值得注意的是,在 2025 年,一项基于中国 40 年县级疫情数据的长时序时空格局研究^[20],将松材线虫病在中国的发展划分为 3 个阶段,利用 SaTScan 时空扫描统计识别出持续扩散和跳跃式扩散 2 种传播类型,并指出人类活动是导致跳跃式扩散,即远距离传播的主导因素。

针对这一重要研究领域目前存在的空白,本研究探讨了人类活动对该疾病传播动态的影响机制。通过建立模型重点考察 2 个独立松林生态系统之间可能发生的跨区域传播过程。模型丰富了经典建模框架,研究分析了人类活动如何影响疾病的持续存在,以及传播波动的幅度如何影响入侵阈值和总体流行病风险。这些发现将为设计控制策略以防止松材线虫病的传播和保护脆弱的森林生态系统提供理论依据。

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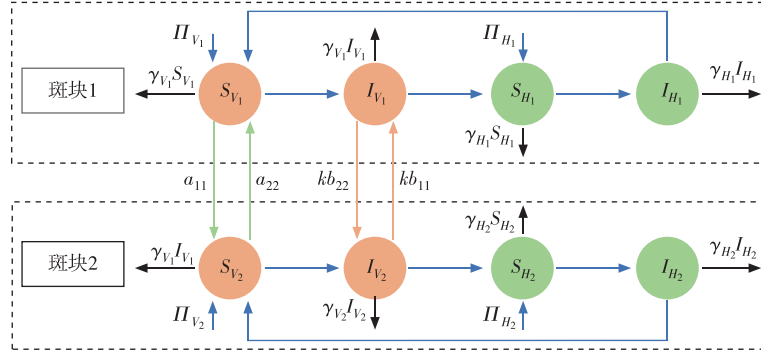
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1 建立模型

为研究长距离对松材线虫病传播的动力学行为,本研究建立了一个双斑块传播模型。该模型是以文献[15]提出的经典模型为基础构建的,同时参考了文献[21-23]中描述斑块传播模型的概念方法构建双斑块传播模型;在斑块 $i(i=1,2)$ 中,将松树种群划分为易感松类(S_{H_i})和感病松类(I_{H_i});将天牛种群划分为易感天牛类(S_{V_i})和感病天牛类(I_{V_i})。基于松材线虫病的传播特性,绘制该疾病斑块间的扩散流程图,如图1所示。



注:图中色块外的符号解释见模型(1)后。

图1 两斑块间松材线虫病传播示意图

Fig. 1 Schematic diagram of pine wilt disease transmission between two patches

根据双斑块扩散流程图,数学模型可描述为:

$$\begin{cases} \frac{dS_{H_i}}{dt} = \Pi_{H_i} - \frac{K_i \psi_i S_{H_i} I_{V_i}}{1 + \theta_i I_{V_i}} - \gamma_{H_i} S_{H_i}; \\ \frac{dI_{H_i}}{dt} = \frac{K_i \psi_i S_{H_i} I_{V_i}}{1 + \theta_i I_{V_i}} - \gamma_{H_i} I_{H_i}; \\ \frac{dS_{V_i}}{dt} = \Pi_{V_i} - \frac{\beta_i S_{V_i} I_{H_i}}{1 + \theta_i I_{H_i}} - \gamma_{V_i} S_{V_i} - a_{ij} S_{V_i} + a_{ji} S_{V_j}; \\ \frac{dI_{V_i}}{dt} = \frac{\beta_i S_{V_i} I_{H_i}}{1 + \theta_i I_{H_i}} - \gamma_{V_i} I_{V_i} - kb_{ij} I_{V_i} + kb_{ji} I_{V_j}. \end{cases} \quad (1)$$

其中: $i, j=1, 2, i \neq j$, Π_{H_i} 表示第 i 个斑块松树的补充率; K_i 表示第 i 个斑块中易感松类(S_{H_i})与感病天牛类(I_{V_i})之间的接触率; ψ_i 表示接触导致松树感染的概率; γ_{H_i} 表示松树的自然死亡率; θ_i 表示饱和常数; Π_{V_i} 表示第 i 个斑块中介介(天牛)的羽化率; γ_{V_i} 是第 i 个斑块天牛的自然死亡率; β_i 表示第 i 个斑块易感天牛染病的概率。病控制限制下,传播率设为 k , 当 $k=0$ 时,禁止感病媒介天牛在斑块间移动, $k=1$ 表示无任何限制,这里假设 $0 < k < 1$; $a_{ij} > 0$ 表示易感媒介天牛从斑块 i 迁移到斑块 j 的比率; $b_{ij} > 0$ 表示感病媒介天牛从斑块 i 迁移到斑块 j 的比率。令 $R_+^8 = \{(X_1, \dots, X_8) \in R^8 | X_i \geq 0, i=1, \dots, 8\}$ 。在生物学意义下,假设模型式(1)的初值条件为 $x_0 = (S_{H_1}(0), S_{H_2}(0), I_{H_1}(0), I_{H_2}(0), S_{V_1}(0), S_{V_2}(0), I_{V_1}(0), I_{V_2}(0)) \in R_+^8$ 。让

$$\Phi_t(x_0) = (S_{H_1}(t), S_{H_2}(t), I_{H_1}(t), I_{H_2}(t), S_{V_1}(t), S_{V_2}(t), I_{V_1}(t), I_{V_2}(t))$$

为模型式(1)的解。类似于文献[24],有如下定理。

定理 1 设初始值 $x_0 \in R_+^8$, 则对任意时间 $t(t \geq 0)$, 模型式(1)对应的解 $\Phi_t(x_0) \in R_+^8$ 。

令:

$$\Gamma = \left\{ (S_{H_1}, S_{H_2}, I_{H_1}, I_{H_2}, S_{V_1}, S_{V_2}, I_{V_1}, I_{V_2}) \in R_+^8 \mid S_{H_1} + S_{H_2} + I_{H_1} + I_{H_2} + S_{V_1} + S_{V_2} + I_{V_1} + I_{V_2} \leq \frac{\Pi}{\gamma} \right\},$$

其中:

$$\Pi = \Pi_{H_1} + \Pi_{H_2} + \Pi_{V_1} + \Pi_{V_2} > 0, \gamma = \min\{\gamma_{H_1}, \gamma_{H_2}, \gamma_{V_1}, \gamma_{V_2}\} > 0.$$

定理 2 设初始值 $x_0 \in R_+^8$, 则 Γ 是式(1)的正不变集。

证明 $N = S_{H_1} + S_{H_2} + I_{H_1} + I_{H_2} + S_{V_1} + S_{V_2} + I_{V_1} + I_{V_2}$, 则 N 关于时间的导数为:

$$\begin{aligned} \frac{dN}{dt} = & \Pi_{H_1} + \Pi_{H_2} + \Pi_{V_1} + \Pi_{V_2} - \gamma_{H_1}(S_{H_1} + I_{H_1}) - \gamma_{H_2}(S_{H_2} + I_{H_2}) - \\ & \gamma_{V_1}(S_{V_1} + I_{V_1}) - \gamma_{V_2}(S_{V_2} + I_{V_2}) \leq \Pi - \gamma N. \end{aligned} \quad (2)$$

容易证明, 当 $N \geq \frac{\Pi}{\gamma}$ 时, 有 $\frac{dN}{dt} \leq 0$, 这意味着 Γ 是一个不变集。根据式(2), 并利用比较定理可以得到:

$$0 \leq N(t) \leq N(0)e^{-\gamma t} + \frac{\Pi}{\gamma}(1 - e^{-\gamma t}).$$

因此, 当 $t \rightarrow +\infty$ 时, $0 \leq N(t) \leq \frac{\Pi}{\gamma}$, 所以 Γ 是一个正不变且吸引的集合。

证毕

2 模型稳定性分析

2.1 无病平衡点

在模型式(1)中, 令 $I_{H_1} = I_{H_2} = I_{V_1} = I_{V_2} = 0$, 则得到如下系统:

$$\begin{cases} \frac{dS_{H_1}}{dt} = \Pi_{H_1} - \gamma_{H_1} S_{H_1}; \\ \frac{dS_{H_2}}{dt} = \Pi_{H_2} - \gamma_{H_2} S_{H_2}; \\ \frac{dS_{V_1}}{dt} = \Pi_{V_1} - \gamma_{V_1} S_{V_1} - a_{12} S_{V_1} + a_{21} S_{V_2}; \\ \frac{dS_{V_2}}{dt} = \Pi_{V_2} - \gamma_{V_2} S_{V_2} + a_{12} S_{V_1} - a_{21} S_{V_2}. \end{cases} \quad (3)$$

显然, 线性系统式(3) 有一个唯一的正平衡点如下:

$$E_S^0 = (S_{H_1}^0, S_{H_2}^0, S_{V_1}^0, S_{V_2}^0) = \left(\frac{\Pi_{H_1}}{\gamma_{H_1}}, \frac{\Pi_{H_2}}{\gamma_{H_2}}, \frac{\Pi_{V_1} a_{21} + \Pi_{V_1} \gamma_{V_2} + \Pi_{V_2} a_{21}}{a_{12} \gamma_{V_2} + a_{21} \gamma_{V_1} + \gamma_{V_1} \gamma_{V_2}}, \frac{\Pi_{V_1} a_{12} + \Pi_{V_2} \gamma_{V_2} + \Pi_{V_2} a_{12}}{a_{12} \gamma_{V_2} + a_{21} \gamma_{V_1} + \gamma_{V_1} \gamma_{V_2}} \right).$$

式(3)的系数矩阵为:

$$A = \begin{pmatrix} -\gamma_{H_1} & 0 & 0 & 0 \\ 0 & -\gamma_{H_2} & 0 & 0 \\ 0 & 0 & -(\gamma_{V_1} + a_{12}) & a_{21} \\ 0 & 0 & a_{12} & -(\gamma_{V_2} + a_{21}) \end{pmatrix}.$$

很明显, A 是稳定矩阵^[25], 即 A 的所有特征值都有负实部, 因此 E_S^0 是全局渐近稳定的。进而, 模型式(1)存在一个唯一的无病平衡点 $E^0 = (S_{H_1}^0, S_{H_2}^0, 0, 0, S_{V_1}^0, S_{V_2}^0, 0, 0)$ 。

2.2 基本再生数

考虑下面子系统:

$$\begin{cases} \frac{dI_{H_1}}{dt} = \frac{K_1 \phi_1 S_{H_1} I_{V_1}}{1 + \theta_1 I_{V_1}} - \gamma_{H_1} I_{H_1}; \\ \frac{dI_{H_2}}{dt} = \frac{K_2 \phi_2 S_{H_2} I_{V_2}}{1 + \theta_2 I_{V_2}} - \gamma_{H_2} I_{H_2}; \\ \frac{dI_{V_1}}{dt} = \frac{\beta_1 S_{V_1} I_{H_1}}{1 + \theta_1 I_{V_1}} - \gamma_{V_1} I_{V_1} - kb_{12} I_{V_1} + kb_{21} I_{V_2}; \\ \frac{dI_{V_2}}{dt} = \frac{\beta_2 S_{V_2} I_{H_2}}{1 + \theta_2 I_{V_2}} - \gamma_{V_2} I_{V_2} + kb_{12} I_{V_1} - kb_{21} I_{V_2}. \end{cases} \quad (4)$$

对式(4)在无病平衡点 E^0 处线性化, 得到对应的雅可比矩阵 $J(E^0)$ 如下:

$$J(E^0) = \begin{pmatrix} -\gamma_{H_1} & 0 & K_1 \phi_1 S_{H_1}^0 & 0 \\ 0 & -\gamma_{H_2} & 0 & K_2 \phi_2 S_{H_2}^0 \\ \beta_1 S_{V_1}^0 & 0 & -kb_{12} - \gamma_{V_1} & kb_{21} \\ 0 & \beta_2 S_{V_2}^0 & kb_{12} & -kb_{21} - \gamma_{V_2} \end{pmatrix}.$$

定义疾病传播矩阵 F 和种群转移矩阵 V 如下:

$$F = \begin{pmatrix} 0 & 0 & K_1 \phi_1 S_{H_1}^0 & 0 \\ 0 & 0 & 0 & K_2 \phi_2 S_{H_2}^0 \\ \beta_1 S_{V_1}^0 & 0 & 0 & 0 \\ 0 & \beta_2 S_{V_2}^0 & 0 & 0 \end{pmatrix},$$

$$V = \begin{pmatrix} \gamma_{H_1} & 0 & 0 & 0 \\ 0 & \gamma_{H_2} & 0 & 0 \\ 0 & 0 & kb_{12} + \gamma_{V_1} & -kb_{21} \\ 0 & 0 & -kb_{12} & kb_{21} + \gamma_{V_2} \end{pmatrix}.$$

根据文献[26],式(1)的基本再生数 R_0 定义为 FV^{-1} 的谱半径。通过计算, R_0 的显式表达式如下:

$$R_0 = \sqrt{\frac{R_1(kb_{21} + \gamma_{V_2}) + R_2(kb_{12} + \gamma_{V_1}) + \sqrt{[R_1(kb_{21} + \gamma_{V_2}) + R_2(kb_{12} + \gamma_{V_1})]^2 + 4R_1R_2\Delta}}{2}}. \quad (5)$$

其中:

$$R_1 = \frac{\beta_1 S_{V_1}^0 K_1 \phi_1 S_{H_1}^0}{\gamma_{H_1} \Delta}, R_2 = \frac{\beta_2 S_{V_2}^0 K_2 \phi_2 S_{H_2}^0}{\gamma_{H_2} \Delta}, \Delta = \gamma_{V_2} kb_{12} + \gamma_{V_1} kb_{21} + \gamma_{V_1} \gamma_{V_2}.$$

2.3 模型的灭绝性和一致持续性

定理 3 若 $R_0 < 1$, 则式(1)的无病平衡点 E^0 是全局渐近稳定的。

证明 根据式(1)及定理 1, 有:

$$\begin{cases} \frac{dS_{H_1}}{dt} \leq \Pi_{H_1} - \gamma_{H_1} S_{H_1}; \\ \frac{dS_{H_2}}{dt} \leq \Pi_{H_2} - \gamma_{H_2} S_{H_2}; \\ \frac{dS_{V_1}}{dt} \leq \Pi_{V_1} - \gamma_{V_1} S_{V_1} - a_{12} S_{V_1} + a_{21} S_{V_2}; \\ \frac{dS_{V_2}}{dt} \leq \Pi_{V_2} - \gamma_{V_2} S_{V_2} + a_{12} S_{V_1} - a_{21} S_{V_2}. \end{cases} \quad (6)$$

由于式(3)的解随着 $t \rightarrow +\infty$ 而趋近于正平衡点 $(S_{H_1}^0, S_{H_2}^0, S_{V_1}^0, S_{V_2}^0)$, 因此, 由比较原理^[27], $\forall \epsilon > 0, \exists T > 0$ 使得当 $t > T$ 时有:

$$(S_{H_1}(t), S_{V_1}(t), S_{H_2}(t), S_{V_2}(t)) \leq (S_{H_1}^0 + \epsilon, S_{V_1}^0 + \epsilon, S_{H_2}^0 + \epsilon, S_{V_2}^0 + \epsilon). \quad (7)$$

因此, 当 t 充分大时, 由式(1)有:

$$\begin{cases} \frac{dI_{H_1}}{dt} \leq K_1 \phi_1 (S_{H_1}^0 + \epsilon) I_{V_1} - \gamma_{H_1} I_{H_1}; \\ \frac{dI_{H_2}}{dt} \leq K_2 \phi_2 (S_{H_2}^0 + \epsilon) I_{V_2} - \gamma_{H_2} I_{H_2}; \\ \frac{dI_{V_1}}{dt} \leq \beta_1 (S_{V_1}^0 + \epsilon) I_{H_1} - \gamma_{V_1} I_{V_1} - kb_{12} I_{V_1} + kb_{21} I_{V_2}; \\ \frac{dI_{V_2}}{dt} \leq \beta_2 (S_{V_2}^0 + \epsilon) I_{H_2} - \gamma_{V_2} I_{V_2} + kb_{12} I_{V_1} - kb_{21} I_{V_2}. \end{cases} \quad (8)$$

考虑式(8)的比较系统:

$$\begin{cases} \frac{d\bar{I}_{H_1}}{dt} = K_1\phi_1(S_{H_1}^0 + \epsilon)\bar{I}_{V_1} - \gamma_{H_1}\bar{I}_{H_1}; \\ \frac{d\bar{I}_{H_2}}{dt} = K_2\phi_2(S_{H_2}^0 + \epsilon)\bar{I}_{V_2} - \gamma_{H_2}\bar{I}_{H_2}; \\ \frac{d\bar{I}_{V_1}}{dt} = \beta_1(S_{V_1}^0 + \epsilon)\bar{I}_{H_1} - \gamma_{V_1}\bar{I}_{V_1} - kb_{12}\bar{I}_{V_1} + kb_{21}\bar{I}_{V_2}; \\ \frac{d\bar{I}_{V_2}}{dt} = \beta_2(S_{V_2}^0 + \epsilon)\bar{I}_{H_2} - \gamma_{V_2}\bar{I}_{V_2} + kb_{12}\bar{I}_{V_1} - kb_{21}\bar{I}_{V_2}. \end{cases} \quad (9)$$

式(9)的系数矩阵为 $F(\epsilon) - V$, 其中:

$$F(\epsilon) = \begin{pmatrix} 0 & 0 & K_1\phi_1(S_{H_1}^0 + \epsilon) & 0 \\ 0 & 0 & 0 & K_2\phi_2(S_{H_2}^0 + \epsilon) \\ \beta_1(S_{V_1}^0 + \epsilon) & 0 & 0 & 0 \\ 0 & \beta_2(S_{V_2}^0 + \epsilon) & 0 & 0 \end{pmatrix}.$$

用 $R_0(\epsilon)$ 表示 $F(\epsilon)V^{-1}$ 的谱半径. 由于 R_0 是 $F(0)V^{-1}$ 的谱半径且 $R_0 < 1$, 所以能够选择足够小的 $\epsilon > 0$ 使得 $R_0(\epsilon) < 1$. 因此根据文献[27]中的定理 2.1 知当 $t \rightarrow \infty$ 时, $(\bar{I}_{H_1}, \bar{I}_{V_1}, \bar{I}_{H_2}, \bar{I}_{V_2}) \rightarrow (0, 0, 0, 0)$. 因此, 由式(7)和比较原理可知, 当 $t \rightarrow \infty$ 时, 式(1)的解满足:

$$(I_{H_1}(t), I_{V_1}(t), I_{H_2}(t), I_{V_2}(t)) \rightarrow (0, 0, 0, 0) \text{ 当 } t \rightarrow +\infty. \quad (10)$$

那么, $\exists T_1 > T$, 使得当 $t > T_1$ 时, 有:

$$(I_{H_1}(t), I_{V_1}(t), I_{H_2}(t), I_{V_2}(t)) \leq (\epsilon, \epsilon, \epsilon, \epsilon).$$

因此, 当 t 充分大时, 由式(1)有:

$$\begin{cases} \frac{dS_{H_1}}{dt} \geq \Pi_{H_1} - \left(\frac{K_1\phi_1\epsilon}{1+\theta_1\epsilon} + \gamma_{H_1} \right) S_{H_1}; \\ \frac{dS_{H_2}}{dt} \geq \Pi_{H_2} - \left(\frac{K_2\phi_2\epsilon}{1+\theta_2\epsilon} + \gamma_{H_2} \right) S_{H_2}; \\ \frac{dS_{V_1}}{dt} \geq \Pi_{V_1} - \left(\frac{\beta_1\epsilon}{1+\theta_1\epsilon} + \gamma_{V_1} \right) S_{V_1} - a_{12}S_{V_1} + a_{21}S_{V_2}; \\ \frac{dS_{V_2}}{dt} \geq \Pi_{V_2} - \left(\frac{\beta_2\epsilon}{1+\theta_2\epsilon} + \gamma_{V_2} \right) S_{V_2} + a_{12}S_{V_1} - a_{21}S_{V_2}. \end{cases} \quad (11)$$

考虑式(11)的比较系统:

$$\begin{cases} \frac{d\bar{S}_{H_1}}{dt} = \Pi_{H_1} - \left(\frac{K_1\phi_1\epsilon}{1+\theta_1\epsilon} + \gamma_{H_1} \right) \bar{S}_{H_1}; \\ \frac{d\bar{S}_{H_2}}{dt} = \Pi_{H_2} - \left(\frac{K_2\phi_2\epsilon}{1+\theta_2\epsilon} + \gamma_{H_2} \right) \bar{S}_{H_2}; \\ \frac{d\bar{S}_{V_1}}{dt} = \Pi_{V_1} - \left(\frac{\beta_1\epsilon}{1+\theta_1\epsilon} + \gamma_{V_1} \right) \bar{S}_{V_1} - a_{12}\bar{S}_{V_1} + a_{21}\bar{S}_{V_2}; \\ \frac{d\bar{S}_{V_2}}{dt} = \Pi_{V_2} - \left(\frac{\beta_2\epsilon}{1+\theta_2\epsilon} + \gamma_{V_2} \right) \bar{S}_{V_2} + a_{12}\bar{S}_{V_1} - a_{21}\bar{S}_{V_2}. \end{cases} \quad (12)$$

类似于式(3)的分析方法, 线性系统式(12)有一个全局稳定的正平衡点 $(\bar{S}_{H_1}^0, \bar{S}_{H_2}^0, \bar{S}_{V_1}^0, \bar{S}_{V_2}^0)$, 其中:

$$\begin{aligned}\bar{S}_{H_1}^0 &= \frac{\Pi_{H_1}}{\frac{K_1\psi_1\epsilon}{1+\theta_1\epsilon} + \gamma_{H_1}}, \bar{S}_{H_2}^0 = \frac{\Pi_{H_2}}{\frac{K_2\psi_2\epsilon}{1+\theta_2\epsilon} + \gamma_{H_2}}, \\ \bar{S}_{V_1}^0 &= \frac{\Pi_{V_1}a_{21} + \Pi_{V_1}\left(\frac{\beta_2\epsilon}{1+\theta_2\epsilon} + \gamma_{V_2}\right) + \Pi_{V_2}a_{21}}{a_{12}\left(\frac{\beta_2\epsilon}{1+\theta_2\epsilon} + \gamma_{V_2}\right) + a_{21}\left(\frac{\beta_1\epsilon}{1+\theta_1\epsilon} + \gamma_{V_1}\right) + \left(\frac{\beta_1\epsilon}{1+\theta_1\epsilon} + \gamma_{V_1}\right)\left(\frac{\beta_2\epsilon}{1+\theta_2\epsilon} + \gamma_{V_2}\right)}, \\ \bar{S}_{V_2}^0 &= \frac{\Pi_{V_1}a_{12} + \Pi_{V_2}\left(\frac{\beta_1\epsilon}{1+\theta_1\epsilon} + \gamma_{V_1}\right) + \Pi_{V_2}a_{12}}{a_{12}\left(\frac{\beta_2\epsilon}{1+\theta_2\epsilon} + \gamma_{V_2}\right) + a_{21}\left(\frac{\beta_1\epsilon}{1+\theta_1\epsilon} + \gamma_{V_1}\right) + \left(\frac{\beta_1\epsilon}{1+\theta_1\epsilon} + \gamma_{V_1}\right)\left(\frac{\beta_2\epsilon}{1+\theta_2\epsilon} + \gamma_{V_2}\right)}.\end{aligned}$$

那么,由式(11)和比较原理可知, $\exists T_2 > T_1$,使得当 $t > T_2$ 时,有:

$$(S_{H_1}(t), S_{V_1}(t), S_{H_2}(t), S_{V_2}(t)) \geq (\bar{S}_{H_1}^0 + \epsilon, \bar{S}_{V_1}^0 + \epsilon, \bar{S}_{H_2}^0 + \epsilon, \bar{S}_{V_2}^0 + \epsilon). \quad (13)$$

显然有:

$$\lim_{\epsilon \rightarrow 0} (\bar{S}_{H_1}^0, \bar{S}_{H_2}^0, \bar{S}_{V_1}^0, \bar{S}_{V_2}^0) = (S_{H_1}^0, S_{H_2}^0, S_{V_1}^0, S_{V_2}^0). \quad (14)$$

因此,根据式(7)、(13)和(14)有:

$$(S_{H_1}(t), S_{V_1}(t), S_{H_2}(t), S_{V_2}(t)) \rightarrow (S_{H_1}^0, S_{V_1}^0, S_{H_2}^0, S_{V_2}^0), t \rightarrow +\infty. \quad (15)$$

那么,通过式(10)和(15),证得 E^0 是全局渐近稳定的。

证毕

定理4 若 $R_0 > 1$,则式(1)中疾病是一致持续的,即存在一个 $\epsilon > 0$,使得式(1)的任何正解 $\Phi_t(x_0)$ 满足:

$$\liminf_{t \rightarrow \infty} S_{H_i}(t) > \epsilon, \liminf_{t \rightarrow \infty} I_{H_i}(t) > \epsilon, \liminf_{t \rightarrow \infty} S_{V_i}(t) > \epsilon, \liminf_{t \rightarrow \infty} I_{V_i}(t) > \epsilon, i = 1, 2. \quad (16)$$

其中: $x_0 \in R_+^8$ 且 $I_{H_1}(0) + I_{H_2}(0) + I_{V_1}(0) + I_{V_2}(0) > 0$ 。

证明 定义:

$$\begin{aligned}X_0 &= \{(S_{H_1}, S_{H_2}, I_{H_1}, I_{H_2}, S_{V_1}, S_{V_2}, I_{V_1}, I_{V_2}) \in R_+^8 : I_{H_1} > 0, I_{H_2} > 0, I_{V_1} > 0, I_{V_2} > 0\}; \\ \partial X_0 &= R_+^8 \setminus X_0.\end{aligned}$$

为了证明该疾病是一致持续存在的,只需证明 ∂X_0 对于式(1)在 X_0 中的解具有一致排斥性。显然 ∂X_0 在 R_+^8 中是相对闭的,且 R_+^8 和 X_0 都是正不变的。根据定理2,式(1)的解是点耗散的。

设 $M_\partial = \{x_0 \in \partial X_0 : \Phi_t(x_0) \in \partial X_0, t \geq 0\}$ 和 $D = \{x_0 \in R_+^8 : I_{H_1} = I_{H_2} = I_{V_1} = I_{V_2} = 0\}$ 。显然 $D \subset M_\partial$,任意取 $x_0 \in \partial X_0 \setminus D$,即 $I_{H_1}(0) + I_{H_2}(0) + I_{V_1}(0) + I_{V_2}(0) > 0$ 。因此 $I_{H_1}(0) > 0$ 或者 $I_{H_2}(0) > 0$ 或者 $I_{V_1}(0) > 0$ 或者 $I_{V_2}(0) > 0$ 。下面分情况证明 $\Phi(t) \notin \partial X_0, t \geq 0$ 。

1) 如果 $I_{H_1}(0) > 0$ 。从式(1)知:

$$I_{H_i}(t) = e^{-\gamma_{H_i}t} \left(\int_0^t \frac{K_i\psi_i S_{H_i}(s) I_{V_i}(s)}{1 + \theta_i I_{V_i}(s)} e^{\gamma_{H_i}s} ds + I_{H_i}(0) \right), \quad (17)$$

$$I_{V_i}(t) \geq e^{-(\gamma_{V_i} + kb_{ij})t} \left(\int_0^t \frac{\beta_i S_{V_i}(s) I_{H_i}(s)}{1 + \theta_1 I_{H_i}(s)} e^{(\gamma_{V_i} + kb_{ij})s} ds + I_{V_i}(0) \right), i = 1, 2, i \neq j. \quad (18)$$

因此通过式(17),有 $I_{H_1}(t) > 0, t \geq 0$ 。进而由式(18)可知 $I_{V_1}(t) > 0, t \geq 0$ 。又因为感染媒介天牛种群扩散矩阵是不可约的,所以 $I_{V_2}(t) > 0, t \geq 0$ 。再次利用式(17),可知 $I_{H_2}(t) > 0, t \geq 0$ 。因此,有 $\Phi(x_0) \notin \partial X_0, t \geq 0$ 。同理,如果 $I_{H_2}(0) > 0$,可证 $\Phi_t(x_0) \notin \partial X_0, t \geq 0$ 。

2) 如果 $I_{V_1}(0) > 0$ 。那么通过式(18),有 $I_{V_1}(t) > 0, t \geq 0$ 。由于感染媒介天牛种群的扩散矩阵是不可约的,所以 $I_{V_2}(t) > 0, t \geq 0$ 。因此从式(17),很容易知道 $I_{H_1}(t) > 0$ 且 $I_{H_2}(t) > 0, t \geq 0$ 。所以 $\Phi_t(x_0) \notin \partial X_0, t \geq 0$ 。同理如果 $I_{V_2}(0) > 0$,可证 $\Phi_t(x_0) \notin \partial X_0, t \geq 0$ 。因此,当 $x_0 \in \partial X \setminus D$,有 $\Phi_t(x_0) \notin \partial X_0, t \geq 0$ 。所以 $x_0 \notin M_\partial$ 且 $M_\partial \subset D$ 。综上可得, $M_\partial = D$ 。

明显的, E^0 是 M_∂ 上的唯一平衡点。设 $W^S(E_0)$ 是 E^0 的稳定流形。下面证明当 $R_0 > 1$ 时, $W^S(E_0) \cap X_0 = \emptyset$ 。定义:

$$\mathbf{F}(-\epsilon) = \begin{bmatrix} 0 & 0 & \frac{K_1 \phi_1(S_{H_1}^0 - \epsilon)}{1 + \theta_1 \epsilon} & 0 \\ 0 & 0 & 0 & \frac{K_2 \phi_2(S_{H_2}^0 - \epsilon)}{1 + \theta_2 \epsilon} \\ \frac{\beta_1(S_{V_1}^0 - \epsilon)}{1 + \theta_1 \epsilon} & 0 & 0 & 0 \\ 0 & \frac{\beta_2(S_{V_2}^0 - \epsilon)}{1 + \theta_2 \epsilon} & 0 & 0 \end{bmatrix}.$$

用 $R_0(-\epsilon)$ 表示 $\mathbf{F}(-\epsilon)\mathbf{V}^{-1}$ 的谱半径。由于 R_0 是 $\mathbf{F}(0)\mathbf{V}^{-1}$ 的谱半径且 $R_0 > 1$ 。所以, 能选择足够小的 $\epsilon > 0$, 使得 $R_0(-\epsilon) > 1$ 。选取充分小的 $\delta > 0$ 使得当 $\|x_0 - E^0\| \leq \delta$ 时有:

$$I_{H_i}(0) < \epsilon, I_{V_i}(0) < \epsilon, |S_{H_i}(0) - S_{H_i}^0| < \epsilon, |S_{V_i}(0) - S_{V_i}^0| < \epsilon, i = 1, 2.$$

那么可以断言对于任意的 $x_0 \in X_0$, 满足:

$$\limsup_{t \rightarrow \infty} \|\Phi_t(x_0) - E_0\| > \delta. \quad (19)$$

假设式(19)不成立, 那么存在 $T > 0$, 使得 $\|\Phi_t(x_0) - E_0\| \leq \delta, t \geq T$ 。因此, 当 $t \geq T$ 时, 有:

$$I_{H_i}(t) < \epsilon, I_{V_i}(t) < \epsilon, |S_{H_i}(t) - S_{H_i}^0| < \epsilon, |S_{V_i}(t) - S_{V_i}^0| < \epsilon, i = 1, 2. \quad (20)$$

因此, 当 $t \geq T$ 时, 有:

$$\begin{cases} \frac{dI_{H_1}}{dt} \geq \frac{K_1 \phi_1(S_{H_1}^0 - \epsilon_1) I_{V_1}}{1 + \theta_1 \epsilon_1} - \gamma_{H_1} I_{H_1}; \\ \frac{dI_{H_2}}{dt} \geq \frac{K_2 \phi_2(S_{H_2}^0 - \epsilon_1) I_{V_2}}{1 + \theta_2 \epsilon_1} - \gamma_{H_2} I_{H_2}; \\ \frac{dI_{V_1}}{dt} \geq \frac{\beta_1(S_{V_1}^0 - \epsilon_1) I_{H_1}}{1 + \theta_1 \epsilon_1} - \gamma_{V_1} I_{V_1} - kb_{12} I_{V_1} + kb_{21} I_{V_2}; \\ \frac{dI_{V_2}}{dt} \geq \frac{\beta_2(S_{V_2}^0 - \epsilon_1) I_{H_1}}{1 + \theta_2 \epsilon_1} - \gamma_{V_2} I_{V_2} + kb_{12} I_{V_1} - kb_{21} I_{V_2}. \end{cases} \quad (21)$$

考虑比较系统:

$$\begin{cases} \frac{d\tilde{I}_{H_1}}{dt} = \frac{K_1 \phi_1(S_{H_1}^0 - \epsilon_1) \tilde{I}_{V_1}}{1 + \theta_1 \epsilon_1} - \gamma_{H_1} \tilde{I}_{H_1}; \\ \frac{d\tilde{I}_{H_2}}{dt} = \frac{K_2 \phi_2(S_{H_2}^0 - \epsilon_1) \tilde{I}_{V_2}}{1 + \theta_2 \epsilon_1} - \gamma_{H_2} \tilde{I}_{H_2}; \\ \frac{d\tilde{I}_{V_1}}{dt} = \frac{\beta_1(S_{V_1}^0 - \epsilon_1) \tilde{I}_{H_1}}{1 + \theta_1 \epsilon_1} - \gamma_{V_1} \tilde{I}_{V_1} - kb_{11} \tilde{I}_{V_1} + kb_{22} \tilde{I}_{V_2}; \\ \frac{d\tilde{I}_{V_2}}{dt} = \frac{\beta_2(S_{V_2}^0 - \epsilon_1) \tilde{I}_{H_1}}{1 + \theta_2 \epsilon_1} - \gamma_{V_2} \tilde{I}_{V_2} + kb_{11} \tilde{I}_{V_1} - kb_{22} \tilde{I}_{V_2}. \end{cases} \quad (22)$$

式(22)的系数矩阵为 $\mathbf{F}(-\epsilon) - \mathbf{V}$ 。由于 $R_0(-\epsilon_1) > 1$, 根据文献[26]中的定理 2, 知式(22)的平凡解是不稳定的。又因为矩阵 $\mathbf{F}(-\epsilon) - \mathbf{V}$ 是不可约的且非对角线上的元素是非负的, 所以矩阵 $\mathbf{F}(-\epsilon) - \mathbf{V}$ 有一个正的特征值并对应一个正的特征向量, 因此当 $t \rightarrow \infty$ 时, 式(22)的正解满足:

$$(\tilde{I}_{H_1}, \tilde{I}_{H_2}, \tilde{I}_{V_1}, \tilde{I}_{V_2}) \rightarrow (\infty, \infty, \infty, \infty).$$

然后由式(21)和比较原理, 得到当 $t \rightarrow \infty$ 时, 式(1)的解满足:

$$(I_{H_1}, I_{H_2}, I_{V_1}, I_{V_2}) \rightarrow (\infty, \infty, \infty, \infty).$$

这与式(1)的解点耗散矛盾。因此, 式(19)是成立的, 即 $W^s(E_0) \cap X_0 = \emptyset$ 。

从式(3)不难看出 E_0 在 M_0 中是全局渐近稳定,所以 $\{E_0\}$ 是一个孤立的不变集且无环。因此,通过文献[28]中的定理 4.6, ∂X_0 对于式(1)在 X_0 中的解具有一致排斥性。证毕

3 数值模拟

在本节中,将使用数值模拟验证理论结果。在式(1)中,本文选取参数值如下:

$$\begin{aligned} \Pi_{H_1} &= 5, \Pi_{H_2} = 7, K_1 = 0.05, K_2 = 0.01, \phi_1 = 0.01, \phi_2 = 0.016, \gamma_{H_1} = \gamma_{H_2} = 0.1, \\ \theta_1 &= \theta_2 = 0.01, \Pi_{V_1} = \Pi_{V_2} = 7, \gamma_{V_1} = 0.3, \gamma_{V_2} = 0.4, \beta_1 = 0.04, \beta_2 = 0.06, k = 0.7. \end{aligned}$$

下面开始分别讨论参数 a_{12}, a_{21}, b_{12} 和 b_{21} 的变化对式(1)的影响。

3.1 两斑块无耦合 ($a_{12} = a_{21} = b_{12} = b_{21} = 0$)

首先考虑在这组参数下,2个独立斑块上疾病的传播情况,即令 $a_{11} = 0, a_{22} = 0, b_{11} = 0, b_{22} = 0$,此时斑块1上的无病平衡点为 E_1^0 ,斑块2上的无病平衡点为 E_2^0 ,其中:

$$E_i^0 = \left(\frac{\Pi_{H_i}}{\gamma_{H_i}}, 0, \frac{\Pi_{V_i}}{\gamma_{V_i}}, 0 \right), i = 1, 2.$$

斑块1上基本再生数为 R_0^1 ,斑块2上基本再生数为 R_0^2 ,其中:

$$R_0^i = \frac{\sqrt{K_i \phi_i \Pi_{H_i} \Pi_{V_i}}}{\gamma_{H_i} \gamma_{V_i}}, i = 1, 2.$$

根据文献[15],当 $R_0^i < 1$ 时,斑块 i 的无病平衡点为 E_i^0 是稳定的;当 $R_0^i > 1$ 时,疾病在斑块 i 上是流行的。根据上面参数,可以算出 $R_0^1 = 0.9661$ 和 $R_0^2 = 1.7146$,因此疾病在斑块1上是灭绝的,在斑块2上是持久的(见图2)。

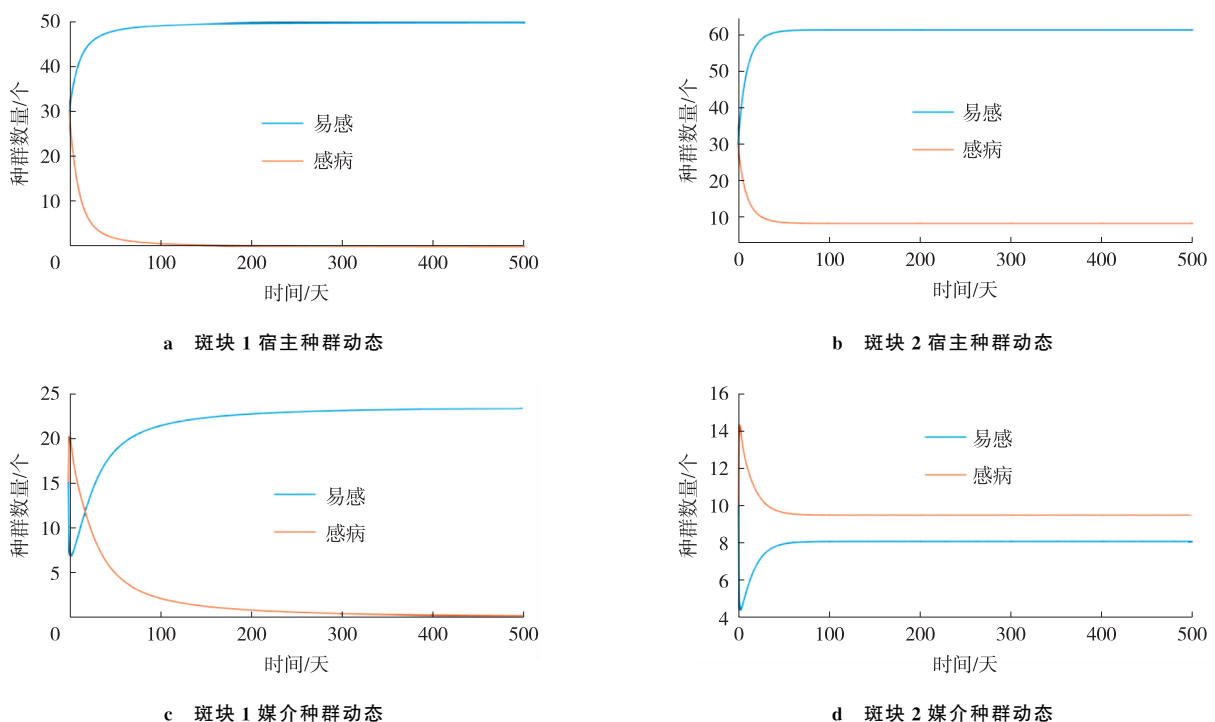


图2 2个孤立斑块中的宿主-媒介种群动态图

Fig. 2 Host-vector population dynamics in two isolated patches

3.2 耦合2个斑块 ($a_{12} > 0, a_{21} > 0, b_{12} > 0, b_{21} > 0$)

取 $a_{12} = 0.4, a_{21} = 0.65, b_{12} = 0.4, b_{21} = 0.65$,将参数值代入式(5),计算得 $R_0 = 1.3142$ 。因此,根据定理4,式(1)是随机持续的(见图3)。从3.1节知道原本2个孤立斑块中,斑块1是灭绝的,斑块2是持久的,但是由于人类活动导致的感染媒介天牛长距离传播使得斑块1的基本再生数变大,疾病感染会加剧。因此,感染媒介天牛

长距离传播对系统有明显影响。

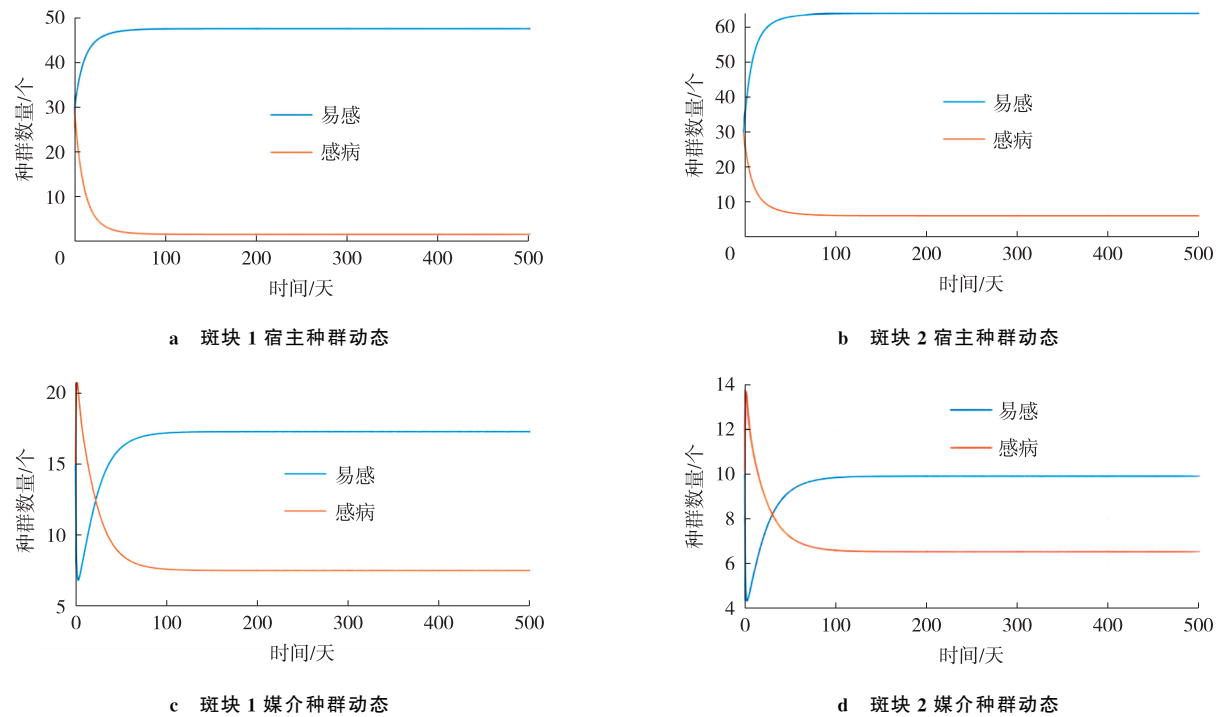


图 3 $R_0 > 1$ 时,宿主和媒介的变化曲线

Fig. 3 Variation curves of host and vector populations when $R_0 > 1$

4 结论与讨论

在本研究中,建立了一个两斑块的松材线虫病数学模型,该模型包含了长距离传播机制,特别是由人类活动驱动的长距离扩散机制。本研究给出了该模型的基本再生数 R_0 ,并证明当 $R_0 < 1$ 时,无病平衡点是全局渐近稳定的,意味着 2 个斑块中的疾病最终将被根除;相反,当 $R_0 > 1$ 时,系统是一致持续的,疾病将在 2 个斑块保持地方性流行。数值模拟进一步揭示了人类活动导致的感染媒介天牛长距离传播将增加疾病扩散的风险,研究结果为进一步理解松材线虫病空间传播提供了理论依据。

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Research on the Impact of Human Activities on the Transmission Dynamics of Pine Wilt Disease

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Abstract: Pine wilt disease, known as the “cancer of pine trees” can rapidly cause pine mortality and poses devastating damage to economic development and forest ecosystems. The migration of vector beetles, which mediate infection, is a key factor driving the global spread and outbreak of pine wilt disease. In this study, we developed a two-patch host-vector coupled model for pine wilt disease, incorporating both natural dispersal of vector insects and human-mediated long-distance transmission. The basic reproduction number R_0 was derived using the next-generation matrix. We proved that when $R_0 < 1$, the disease-free equilibrium is globally asymptotically stable and the disease eventually dies out; when $R_0 > 1$, the system is uniformly persistent and the disease becomes endemic. Our findings indicate that human-mediated long-distance transmission can invade previously disease-free areas and spread infection from high-prevalence regions to low-prevalence regions. These results provide a theoretical basis for spatially coordinated intervention measures, including quarantine along timber transport routes and buffer zone management.

Keywords: pine wilt disease; patch; basic reproduction number; persistence; extinction

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