# Resource distribution drives the adoption of migratory, partially migratory, or residential strategies

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## ABSTRACT

20

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Organismal movement can take on a variety of spatial and temporal forms. These forms depend in part on the type and scale of environment experienced as well as the internal state of the individual. However, individuals experiencing seemingly the same environment on the same time scale can display different movement strategies. Here we consider the case where movement is costly and individuals must return to a common breeding ground annually to reproduce. We derive the optimal movement strategy, given specific movement costs and environmental resource distributions. We find, intuitively, that large resource clines favor migratory behavior, and small resource clines favor residential behavior. However we also show that when resource clines are sharp, migrants and residents can coexist with each exploiting a locally optimal behavior. This can be interpreted as an example of partial migration (if migrants and residents are members of the same species). Alternatively, this can also be interpreted as two recently divergent species coexisting on a single resource, using different movement strategies to share the niche. We conclude with a discussion of density-dependent pressures on movement, including local resource depletion.

1. Introduction

38

Movement is ubiquitous among living organisms (particularly animals) and is
vital for the long-term persistence and survival of any population (Hanski 1999). A
large diversity of movement patterns are found in nature, spanning a range of
temporal and spatial scales. These can vary from e.g. foraging movements of
nematodes Caenorhabditis elegans on the scale of minutes and centimeters
(Pierce-Shimomura et al. 1999) to e.g. migrations of Arctic terns (Sterna
paradisaea) which travel almost from pole to pole and back again over the course of
a year (Egevang et al. 2010). At its core, movement is an individual behavior
(Kennedy 1985) and can be thought of as an adaptive response to conditions, both
external and internal (Cresswell et al. 2011; Clobert et al. 2012). Intuitively,
different movement types can be favored by different environments, the same
environment experienced on different scales, or by individuals with different
abilities or internal states. However, particularly intriguing are cases where the
same environment experienced by similar individuals on similar scales appears to
select for different movement strategies.

One common example of coexistence of movement patterns is partial migration where some individuals in a population migrate in a given season while others do not (Lundberg 1988). Partial migrations can be clustered among three distinct types (Shaw and Levin 2011): non-breeding partial migration where migrants and non-migrants breed together but spend the non-breeding (e.g. winter) season apart; breeding partial migration where migrants and non-migrants spend the non-breeding season together and breed apart; and skipped-breeding partial migration where individuals must migrate to breed and non migrants do not breed that year (Chapman et al. 2011; see Fig. 1 in Shaw and Levin 2011). In the case of skipped-breeding partial migration, individuals that do not migrate can potentially accumulate extra energy to spend on reproduction in future years (Shaw and Levin 2011, 2013). In this case migrating and non-migrating individuals may differ in

their level of energy stores (e.g. Thorpe 1994; Caut et al. 2008) thus the coexistence of different movement types can be accounted for by individuals differing in internal state.

However, the cause of coexistence between migrant and non-migrant individuals in the cases of non-breeding and breeding partial migration is less clear. The first theoretical explanations of partial migration relied on uncertainty in survival during the non-breeding period to explain the coexistence of migrant and non-migrant types (Cohen 1967; Lundberg 1987). Kaitala et al. (1993) demonstrated theoretically that non-breeding partial migrations could be maintained by separate density-dependent regulation of migrant and non migrant types during the non-breeding season, without invoking environmental uncertainty. More recent models have focused on combinations of density-dependent, density-independent, and stochastic factors in maintaining partial migration (Griswold et al. 2010; Vélez-Espino et al. 2013). In the case of breeding partial migrations, Taylor and Norris (2007) determined that density-dependence during the non-shared season is necessary for the coexistence of migrant and non-migrant types.

All of these models of partial migration include space only implicitly. Since
migration is fundamentally an adaptive response to spatially distributed resources
(Cresswell et al. 2011), spatially explicit models may provide insights that spatially
implicit ones cannot. Furthermore, existing partial migration models also only
indirectly consider ecological conditions as experienced through survival. Migration
appears to be picked up and dropped over short evolutionary time scales suggesting
that current populations are migrant or resident based on existing (or recent)
ecological conditions (Alerstam et al. 2003). Therefore by explicitly considering the
ecological conditions that individuals face (rather than indirect effects through
survival) we may gain a deeper understanding of the conditions favoring migrant
and non-migrant strategies and potentially how changes in conditions may favor

switches in strategies adopted by individuals.

In a recent paper (Reluga and Shaw 2014), we described how the tendency of some species to migrate could be understood in a spatially explicit setting as fitness optimization balancing movement costs with foraging success on a single resource. However, that analysis was limited mostly to numerical results. In this paper, we present exact closed-form solutions for optimal migration on a stationary resource cline when reproduction is constrained to occur annually on an isolated breeding ground. We find that some ecological conditions favor migration, others favor residency, and a subset of conditions support coexistence between resident and migratory strategies. This scenario illustrates how seasonal constraints on life history and in combination with costly movement can bifurcate the niche space, allowing for the potential co-existence of resident and migratory subpopulations (partial migration) or the coexistence of two species with different movement types, on a single resource. We conclude with a consideration of density-dependent effects. These results provide further evidence that partial migrations can evolve under local density dependence even without environmental variation.

2. Model

110

In an idealized evolutionary model of migration, we look at the case where an individual's reproductive success is determined by her foraging success over a lifetime, minus energy expenditures. Consider a semelparous species in a 1-dimensional habitat with a shared breeding ground at location x = 0. Adults are obligated to return to the breeding ground every year (or more generally, every T time units) to reproduce. Between breeding events, an individual may die with mortality risk  $\delta$  per unit time, independent of location, behavior, state, or time of year. The reproductive success of surviving individuals depends on foraging success minus expenditures. When forage abundance is described by a resource distribution  $\Theta(x,t)$  in space and time, and energy expenditure depends only on the speed of

movement, given by  $\gamma(\dot{x})$  where  $\dot{x}$  is the individual's velocity, then the fitness of an individual moving along a path x(t) over its lifetime, with x(0) = x(T) = 0, can be represented by the discounted reproductive value

$$\mathcal{R}_d := e^{-\delta T} \int_0^T \left[ \Theta(x(t), t) - \gamma(\dot{x}(t)) \right] dt. \tag{2.1}$$

For further discussion of the motivation and use of the discounted reproductive number, see Reluga et al. (2009); Thieme (2009); McNamara et al. (2001).

The optimal migration path x(t) is the one that maximizes  $\mathcal{R}_d$ . Using standard methods and results from optimal control theory (Reluga and Shaw 2014), we can deduce that the optimal path can be found by identifying a velocity  $u^*(t)$  such that

$$u^* = \max_{u} \lambda u - \gamma(u), \tag{2.2a}$$

$$\dot{x} = u^*, \tag{2.2b}$$

$$-\dot{\lambda} = \frac{\partial \Theta}{\partial x},\tag{2.2c}$$

with the breeding constraint implying the boundary conditions x(0) = x(T) = 0. Here,  $\lambda(t)$  is an adjoint variable representing the instantaneous value of movement.

Our model is completed by specifying the energy expenditures  $\gamma(u)$  and the resource distribution  $\Theta(x,t)$ . Although there are more complex and accurate models of energy expenditure through movement (Hein et al. 2012), we will adopt a simplified version capturing some basic features and allowing us to obtain exact solutions. Suppose the instantaneous energy use of migration is proportional to the speed of movement but with a hard upper bound on maximum speed, so

$$\gamma(u) = \begin{cases} \left| \frac{u}{f} \right| & \text{if } |u| \le u_{\text{max}}, \\ \infty & \text{otherwise.} \end{cases}$$
 (2.3)

where f is the movement efficiency parameter and  $u_{\text{max}}$  is the maximum speed.

To illustrate how spatial heterogeneity in resource distribution and spatial constraints on reproduction can create bi-modality in fitness, we will use a simple

resource cline. Define a resource distribution that is a static logistic function;

$$\Theta(x,t) := \psi(x) = \frac{(A + A_{\min}) + e^{k(s-x)} A_{\min}}{1 + e^{k(s-x)}}$$
(2.4)

with height parameters A > 0, position-shift parameter s, and shape parameter k > 0. The geometry of this cline assumption includes local domains that are flat, linear, concave, and convex, so we can explore most of the range of possible shapes that come to mind.

This completely specifies our model, with parameters and their units summarized in Table 1.

# 3. Analysis

The structure of this system can be represented in terms of five dimensionless groups

$$\hat{A} := \frac{Af}{u_{\text{max}}}, \quad \hat{A}_{\text{min}} := \frac{A_{\text{min}}f}{u_{\text{max}}}, \quad \hat{\delta} := T\delta, \quad \hat{s} := \frac{s}{Tu_{\text{max}}}, \quad \hat{k} := kTu_{\text{max}}$$

while taking our system variables

$$\hat{t} := \frac{t}{T}, \ \hat{x} := \frac{x}{Tu_{\text{max}}}, \ \hat{u} := \frac{u}{u_{\text{max}}},$$

so without loss of generality, we assume the remaining three parameters are normalized to T=1, f=1,  $u_{\rm max}=1$ . The dimensional analysis shows the time-scale is most naturally measured in terms of the time between breeding events (T), spatial scales are naturally measured in terms of the maximum distance that can be traversed between breeding events  $(Tu_{\rm max})$ , and increasing the amplitude of the gradient (A) is equivalent to a proportional increase in the efficiency of movement (f).

Applying System (2.2) with Eqs. (2.3) and (2.4), any locally optimal

Table 1: Model parameters and units.

Symbol	Interpretation	Units
t	time	time
x(t)	animal position	distance
u(t)	animal velocity	distance per time
$\delta$	discount rate	per time
T	annual cycle length	time
$\gamma(\dot{x})$	movement expenditures	energy per time
f	movement efficiency	distance per energy
$u_{\rm max}$	maximum speed	distance per time
$\psi(x)$	resource distribution	energy per time
A	total resource variation	energy per time
$A_{\min}$	resource minimum	energy per time
s	resource distribution shift	distance
k	resource distribution shape	per distance

movement path must satisfy the first-order conditions

$$\dot{x} = u^*(\lambda), \quad x(0) = x(1) = 0, \quad \dot{\lambda} = -\psi'(x) = \frac{-Ake^{k(s-x)}}{(e^{k(s-x)} + 1)^2}, \tag{3.1a}$$
with  $u^*(\lambda) = \begin{cases} 1 & \text{if } \lambda > 1, \\ [0,1] & \text{if } \lambda = 1, \\ 0 & \text{if } -1 < \lambda < 1, \\ [-1,0] & \text{if } \lambda = -1, \\ -1 & \text{if } \lambda < -1. \end{cases}$ 

System (3.1) specifies an autonomous, two-dimensional boundary-value
problem that can be analyzed in a phase-plane. From Figure 1, we discover that
the optimal path must have the very simple piecewise form

$$x(t) = \min\left(z, \frac{1}{2} - \left|t - \frac{1}{2}\right|\right),\tag{3.2}$$

where z, the maximum migration distance traveled by an individual, is some real number satisfying  $0 \le z \le 1/2$ . The reproductive value under Eq. (2.4) as a function of z is

$$\mathcal{R}_{d}(z) = e^{-\delta} \left\{ (1 - 2z)\psi(z) - 2z + 2 \int_{0}^{z} \psi(t) dt \right\}$$

$$= e^{-\delta} \left\{ 2z(A - 1) + \frac{A(1 - 2z)}{e^{k(s - z)} + 1} + \frac{2A}{k} \log \left( \frac{e^{k(s - z)} + 1}{e^{ks} + 1} \right) + A_{\min} \right\}.$$
 (3.4)

From Eq. (3.4), locally and globally optimal migration strategies can be determined exactly for all parameter values. An example is shown in Figure 2. In general, there may be more than 1 local maximum in the reproductive number (see Figure 3). Note that while resource minimum  $A_{\min}$  appears in  $\mathcal{R}_d$ , it does not change the locations of any resource maxima.

When the shape parameter k is small such that the curvature is small, the resource gradient over [0,1/2] can be approximated by a line. Let  $z^*$  represent the migration distance that maximizes the reproductive value. Under a linear

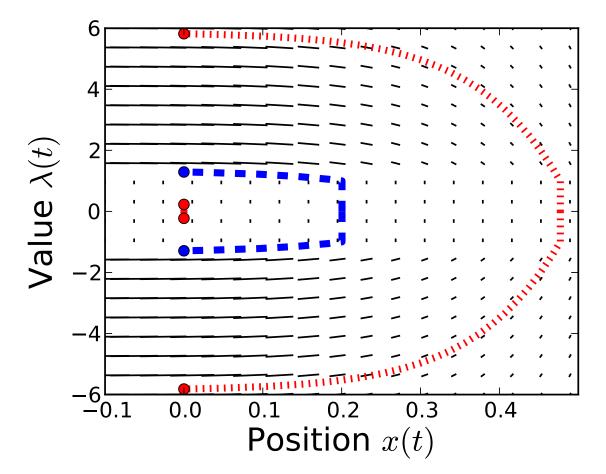


Fig. 1.— Direction field for the orbits of System (3.1). The velocity  $\dot{x}$  shows jumps when the movement-value  $\lambda=\pm 1$ , while the rate of change in the movement-value  $\dot{\lambda}$  varies smoothly as the displacement x gets larger. Optimal paths correspond to orbits with the boundary conditions x(0)=x(1)=0. In this case, there are three such orbits, two local maxima (red dotted) and one saddle point (blue dashed). Parameter values: A=50, s=0.7, k=10.

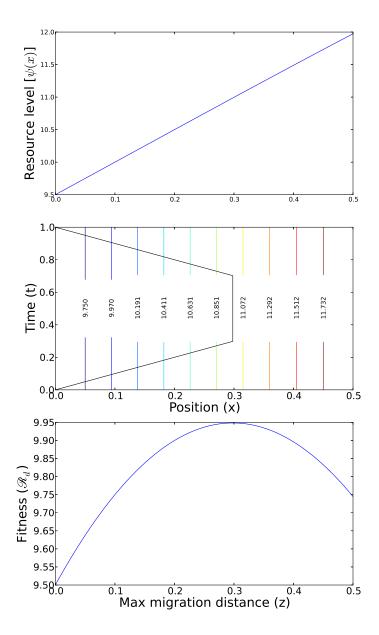


Fig. 2.— Plot of a near-linear resource distribution (top), one period of the corresponding optimal migration strategy (middle), and the fitness of candidate migration strategies (Eq. (3.2)) as a function of maximum migration distance z as given by Eq. (2.1) (bottom). The resource gradient (about 5) is large enough to offset the costs of movement. Parameter values A = 20, k = 1, s = 0.1.

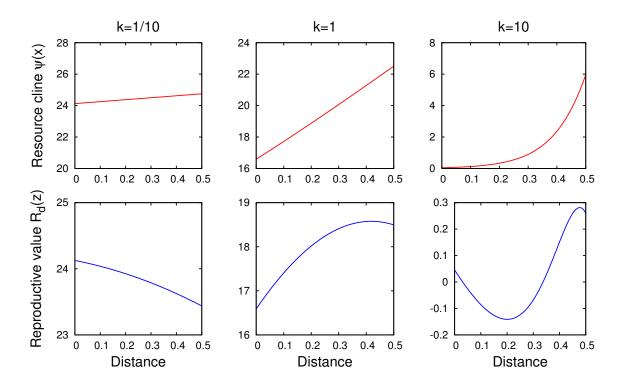


Fig. 3.— These plots show the nonlinear dependence of the discounted reproductive value  $\mathcal{R}_d(z)$  on the maximum migration distance z for three cline shapes. When the resource cline is shallow (left, k=1/10), reproductive value declines monotonely with migration distance. For a moderate linear cline (middle, k=1), an intermediate migration distance dominates. For a steeply accelerating cline (right, k=10), there can be two local optima; z=0 has become a local maximum because the benefits of movement only come to fruition if a relatively flat region of the resource cline is fully crossed to reach a regions of higher resource concentration. Parameters: A=50,  $A_{\min}=0$ , s=0.7.

approximation  $\psi(x) \approx \psi(0) + \psi'(0)x$ , the reproductive value

$$\mathcal{R}_d(z) \approx e^{-\delta} \left\{ \psi(0) + (\psi'(0) - 2)z - \psi'(0)z^2 \right\}$$
(3.5)

and the optimal migration distance is then

$$z^* = \max \left\{ 0, \frac{1}{2} - \frac{1}{\psi'(0)} \right\}. \tag{3.6}$$

So if the resource gradient is linear, the optimal response is to not move (be resident) unless the dimensionless resource gradient  $\psi'(0) > 2$ , but from there, the steeper the resource gradient, the farther an individual should move. Reverting to dimensional variables, not migrating (z = 0) is locally optimal if

$$\psi'(0) < 2fu_{\text{max}} \quad \text{or} \quad \psi'(0) = 2fu_{\text{max}} \text{ and } \psi''(0) < 2fu_{\text{max}}.$$
 (3.7)

We can further analyze Eq. (3.4) to characterize the properties of the optima under different conditions. By differentiating the reproductive value to identify local maxima, we find  $z^*$  must solve the transcendental equation

$$Ak(1 - 2z) = 4\cosh(k(z - s)) + 4. \tag{3.8}$$

At the movement extremes, z=1/2 is never a local maximum, but z=0 is a local maximum if

$$A < \frac{4 + 4\cosh(ks)}{k} \tag{3.9}$$

Heuristically, the resource cline promotes migration if it is close enough to the breeding ground and large enough. Since hyperbolic cosine is convex, no more than two interior local extreme solving Eq. (3.8) can ever coexist. Using calculus techniques, we can determine that two local maxima can only coexist when

$$A > \frac{8k}{k^2 - 4}. (3.10)$$

The bifurcation structure of the extremes of the reproductive value are summarized in Figure 4. If the resource cline is weak (A is small), then the optimal

strategy is not to move. If the resource cline is large (A is large) and sharp (k is large), then as we vary the cline position s, there will be a transitional regime between migration and residency where 2 different local maxima will appear as the cline drifts away from the breeding site (see Figure 4). In between, there is a region where there is always a unique globally optimal movement strategy (see Figure 4).

#### 3.1. Neutral resource distributions

The one other informative special resource distribution is the evolutionarily neutral model. When directly differentiating Eq. (3.3) with respect to the maximum migration distance, we find that at the optimum,

$$\psi'(z^*) = \frac{2}{1 - 2z^*}. (3.11)$$

This ordinary differential equation has general solutions

$$\psi_{\text{neutral}}(x) := C - \ln(1 - 2x)$$
(3.12)

for any constant C. These solutions correspond to a family of perfectly neutral static resource distributions. Every migration of the form of Eq. (3.2) has the same fitness for  $z \in [0, 1/2)$ . The singularity at z = 1/2 is an indicator that optimal migration is always less than half the maximum distance an individual can travel in a year. One of the implications of  $\psi_{\text{neutral}}(x; C)$  is that for any other static smooth resource distribution  $\psi(x)$  such that  $\psi''(x) < \psi''_{\text{neutral}}(x)$ , any locally optimal migration strategy is also globally optimal.

We show below that the neutral resource distribution is a particularly useful idea when trying to understand how our density-independent analysis will extend to density-dependent situations.

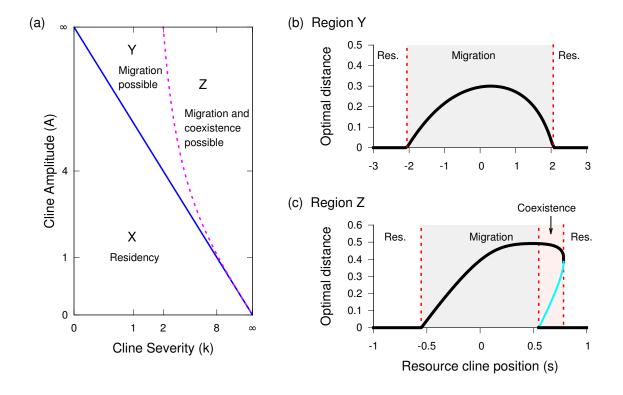


Fig. 4.— (a) The  $A \times k$  parameter space (in hyperbolic coordinates) can be dissected into 3 regions. In region X, the cost of movement always outweighs the potential resource gains, and the best strategy is reside in the breeding-ground year-round (x(t) = 0 for all t). In region Y, the optimal strategy depends on the position of the resource cline, but there is always just 1 locally and globally optimal strategy (b); when the cline is close to the breeding ground  $(s \approx 0)$ , the best strategy will be migration, but when the cline is far from the breeding ground  $(|s| \gg 0)$ , movement costs out-weight resource gains. In region Z, the best movement strategy still depends on the cline position s (see c), but there may be two local resource maxima. In the case of (c), for shift values  $s \in (0.55, 0.79)$ , there are two local maxima and one saddle point. Parameter values: (b) A = 20, k = 1; (c) A = 50, k = 10.

# 4. Density-dependence

208

Although our analysis is density-independent, we can consider
density-dependent extensions of the model. For example, if migrant and resident
populations are regulated independently by density-dependent mortality that
occurs between breeding events (i.e. "soft" selection (Christiansen 1975; Débarre
and Gandon 2011), the coexistence of migrant and resident types when the cline is
steep is preserved. On the other hand, if density-dependence acts uniformly across
the population ("hard" selection) or is exerted at the time of reproduction,
migrants and residents may be directly competing, and only the most fit
subpopulation will persist. In this particular case, individuals might increase their
reproductive success by returning to breed less often. Allowing this would not alter
our results. Overall, these results support previous findings (Kaitala et al. 1993)
that partial non-breeding migrations can occur without environmental
stochasticity, as long as density-dependent regulation of migrants and non-migrants
occurs during the non-breeding season.

If population proliferation is primarily constrained by resource depletion, then
the resource gradient will depend on the grazing pattern of the population.
Suppose, for example, that the resource distribution is in quasi-steady-state
equilibrium with the population. Under the pessimism principle (Mylius and
Diekmann 1995), the population should expand until resource supplies have been
pushed down to levels where they are just sufficient to sustain the population. This
level will be given by  $\max_z \mathcal{R}_d(z) = 1$ . If there are no constraints causing
inefficiency in strategy allocations, then under an ideal distribution, each strategy zwill be used at the frequency for which  $\mathcal{R}_d(z) = 1$ .

The actual frequency of use of each supported strategy remains unknown. It could depend on the explicit resource dynamics. Our solutions only apply to scenarios where the resource distribution is in approximate quasi-steady-state equilibrium with population densities. The problem will be much more difficult to

analyze when time-dynamics are considered for the resource, and may introduce resonance features into the evolution dynamics of migration. An example preliminary theory for such a case is provided in Appendix A, but this is a topic needing future exploration.

## 5. Discussion

240

260

Here we have used optimal control methods to exactly solve for the best
movement path, given specific costs from movement and payoff from different
resource distributions. Dimensional analysis reveals that the importance spatial
variation in resource distributions depends on the speed and efficiency with which
animals can access the resources. We have then shown that changing the shape of
the resource distribution alone shifts whether purely migration, purely residency, or
both are favored as the optimal movement pattern. The coexistence of movement
types can be interpreted in two ways.

First, coexistence of migrant and resident types can be interpreted as partial migration, where both types occur simultaneously within the same population. Our model corresponds to the case of partial non-breeding migration where migrants and residents share a breeding site. Unlike all previous models of partial migration, our model is spatially explicit and directly accounts for the types of ecological conditions that select on movement strategies.

Second, coexistence of migrant and resident types can be interpreted as coexistence of two species with different movement types on a single resource. In this case it is possible that a branching of movement types was a precursor to the speciation event, a process that has been suggested in the case of coexistence of dispersal types (Doebeli and Ruxton 1997; Mathias et al. 2001; Bode et al. 2011).

While our results provide some insight, a number of open problems remain, particularly with respect to the evolution of movement when populations

themselves alter their environments. A simple special case is proposed in Section A, but even basic mathematical results for it remain unknown. Computational experiments and mathematical analysis of spatially-explicit scenarios could greatly deepen our theoretical understanding. Computational experiments could also help us understand the relationship between the optimal strategies we've identified the time-dependent and path-dependent aspects of evolution and speciation can lead up to these optima. It could also be useful to expand on our approaches so that they may approximate the current situations of extant species and anticipate situations where adaptive responses to climate change will be more difficult.

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sympy and scipy libraries for python (SymPy Development Team 2013; Jones et al.
2001-; Python Software Foundation 2010-). Graphics were prepared using Gnuplot
and Matplotlib. (Williams et al. 2010-; Hunter 2007).

## A. On ideal migration allocations

276

As an example of migration theory where populations are constrained by spatially distributed resource depletion, we make use of the concept of grazing pressure. Let allocation I(z) be a measure of the number of animals in the population using each strategy migration strategy z. For every strategy z,  $I(z) \geq 0$ . When animals using strategy z follow the path x(t,z) over the course of the year and consume at a constant rate over time, the total annual grazing pressure at each location u will be given by the formula

$$p(u) := \int_0^{1/2} \int_0^1 I(z)\delta(u - x(t, z)) dt dz$$
 (A1)

where  $\delta$ () is Dirac's delta-function (not to be confused with our discounting parameter  $\delta$ ). Assuming individuals follow migration paths of the form of Eq. (3.2),

the annual grazing pressure can be simplified to

$$p(x) = (1 - 2x)I(x) + 2\int_{x}^{1/2} I(z)dz.$$
 (A2)

To get further, we propose that the annual dynamics of the resource distribution are governed by the linear difference equation

$$\psi_{t+1}(x) = \max\{0, \beta\psi_t(x) + r(x) - p(x)\}$$
(A3)

where  $\beta$  is the fraction of resource persisting from the previous season, r(x) is the annual resource inflow at all locations x, and p(x) is the annual grazing pressure consuming resource. Over time, the resource distribution will converge to the equilibrium

$$\overline{\psi}(x) = \max\left\{0, \frac{r(x) - p(x)}{1 - \beta}\right\}. \tag{A4}$$

The reproductive success of a strategy z under a equilibrium resource distribution  $\overline{\psi}$  can be determined from Eq. (3.3). So, from an allocation, we can determine the grazing pressure over space. From the grazing pressure, we can determine the equilibrium resource distribution. And from the equilibrium resource distribution, we can determine the discounted reproductive success of each strategy. Thus, the discounted reproductive success in the presence of resource depletion can be thought of as a function of the strategy allocation  $(\mathcal{R}_d(z;I))$ .

Under the pessimism principle (Mylius and Diekmann 1995), a stable allocation  $I^*$  is one for which no strategy can be adopted to invade successfully (max<sub>z</sub>  $\mathcal{R}_d(z; I^*) = 1$ ) and no unsustainable strategy is used (for every strategy z where  $I^*(z) > 0$ ,  $\mathcal{R}_d(z; I^*) = 1$ ). These conditions provide a set of equations from which we can attempt to identify a stable allocation  $I^*$ . General results as to when a stable allocation can be found, and if there are more than one for a given system, are unknown. However, using elementary fixed-point methods, we can calculate some elementary examples of stable allocations (see Figures 5-7).

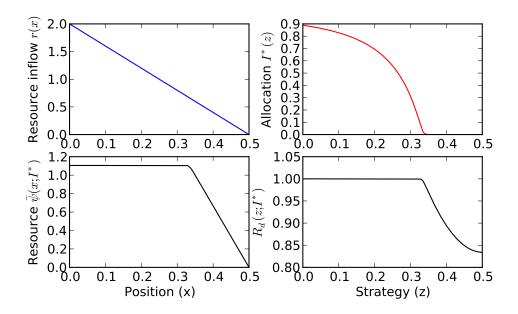


Fig. 5.— Figure of a stable strategy allocation  $I^*(z)$  when resource accumulates according to a linear gradient (r(x) = 2 - 4x). Non-migratory strategies are the most frequently used. Parameters  $\beta = 0.4$ ,  $\delta = 0.1$ .

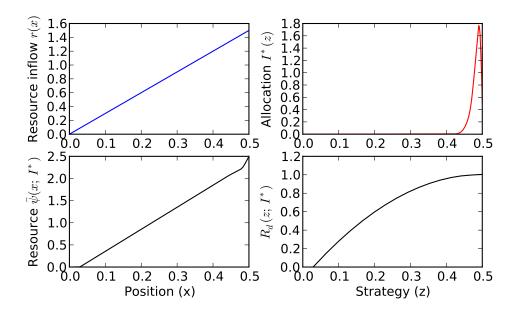


Fig. 6.— Figure of a stable strategy allocation  $I^*(z)$  when resource accumulates according to an increasing linear cline (r(x) = 3x). The allocation is dominated by long migrations. Parameters  $\beta = 0.4$ ,  $\delta = 0.1$ .

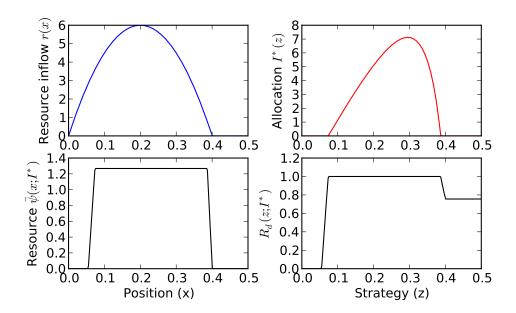


Fig. 7.— Figure of a stable strategy allocation  $I^*(z)$  when resource accumulates unimodally  $(r(x) = 60x - 150x^2)$ . Only strategies that migrate an intermediate distance are allocated. Parameters  $\beta = 0.4$ ,  $\delta = 0.1$ .

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308

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