

INTRODUCTION OF EXOPLANET DETECTION AND ANALYSIS METHODS

Ignasi Ribas

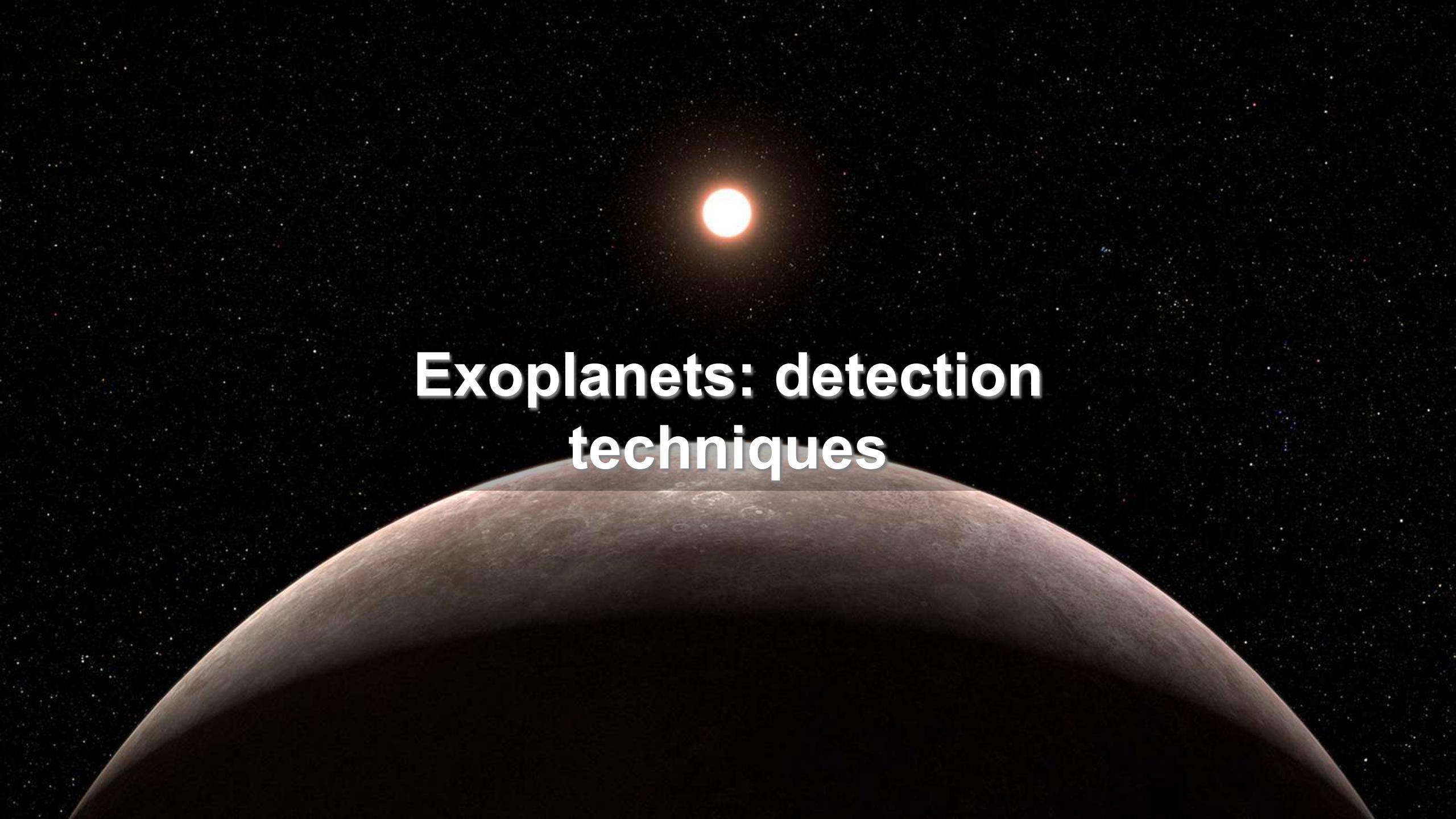
Institut de Ciències de l'Espai (ICE, CSIC)
Institut d'Estudis Espacials de Catalunya (IEEC)



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European Research Council
Established by the European Commission



Exoplanets: detection techniques

Finding planets is complicated...

Tau Ceti

Spectral type: G8V

Distance: 11.9 light years

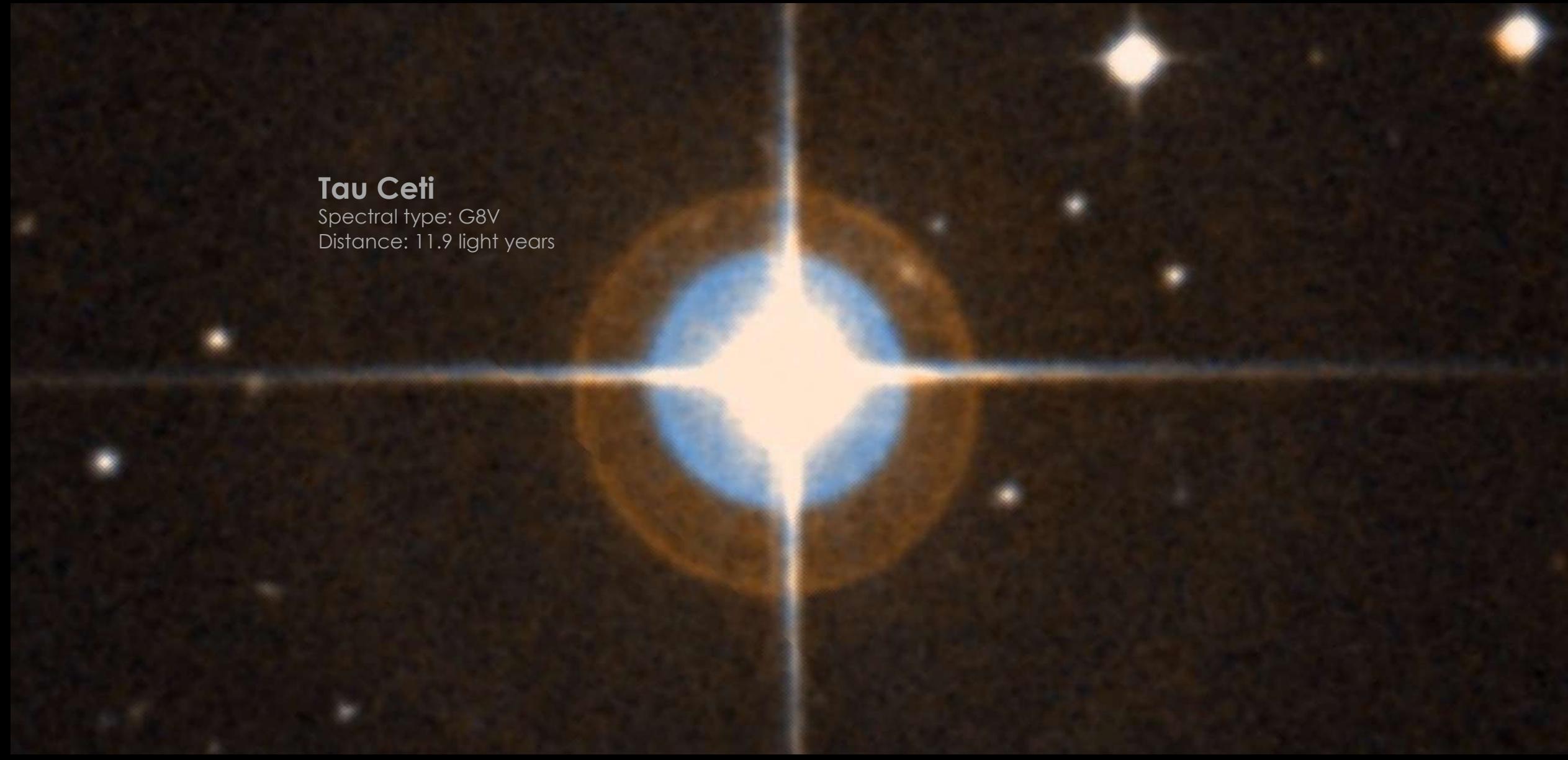


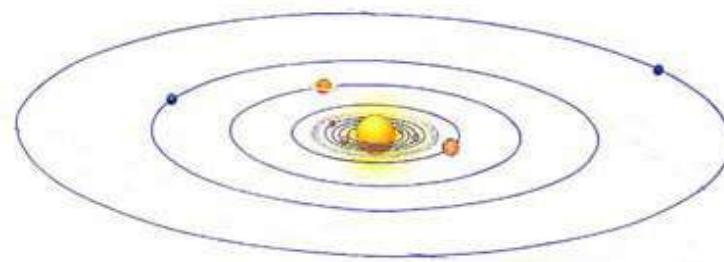
Finding planets is complicated...

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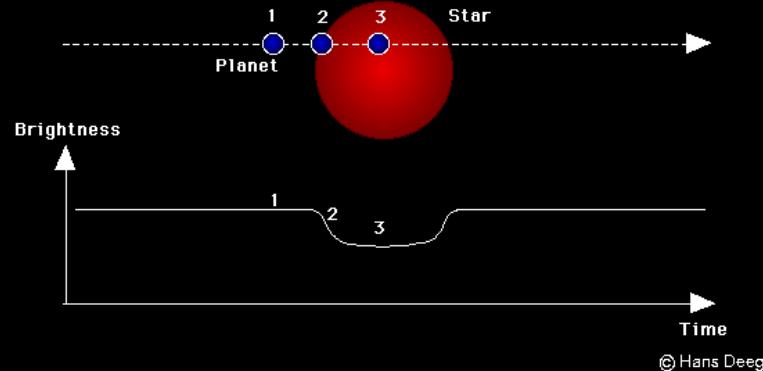
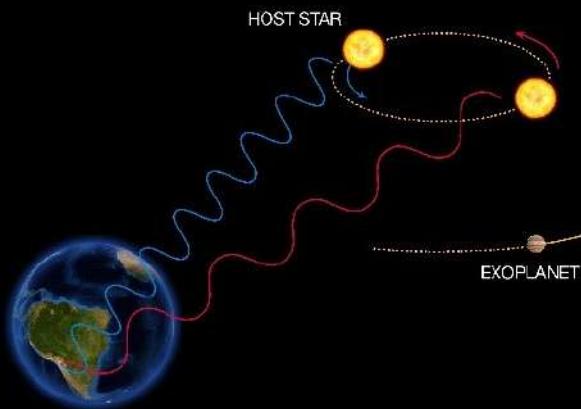
Distance: 11.9 light years



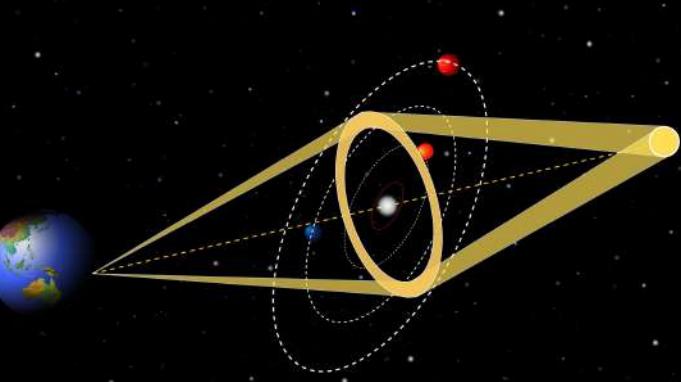


10^9 times fainter...

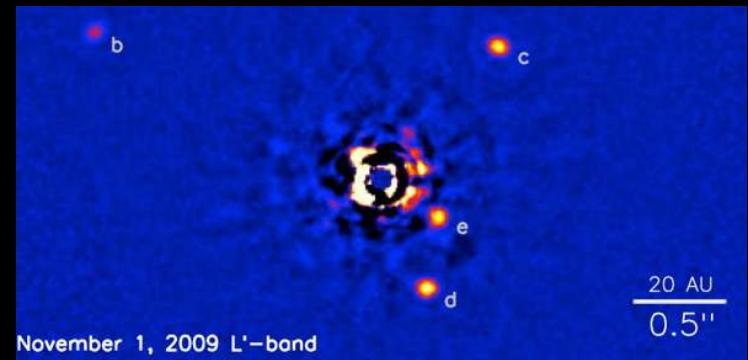
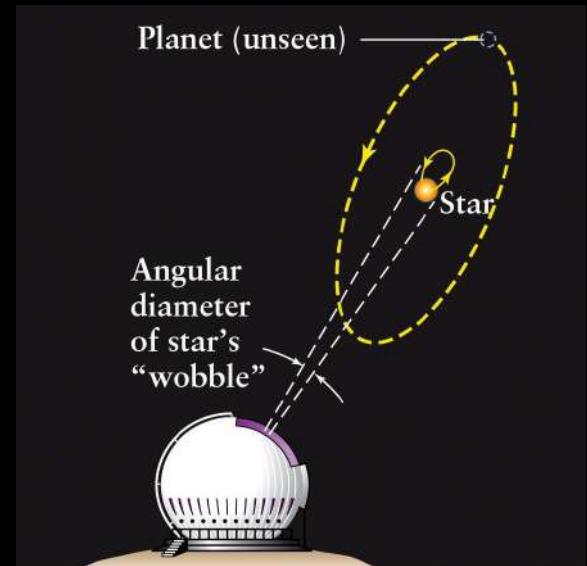
How do we find exoplanets?



Indirect methods



Gravitational lensing



Direct imaging

Historical introduction

- 70 Ophiuchi – binary star at 17 light years

Astrometry

Monthly Notices of the Royal Astronomical Society (1855)

On certain Anomalies presented by the Binary Star 70 Ophiuchi.
By Capt. W. S. Jacob, Madras Astronomer.

First exoplanet announced... in 1855!

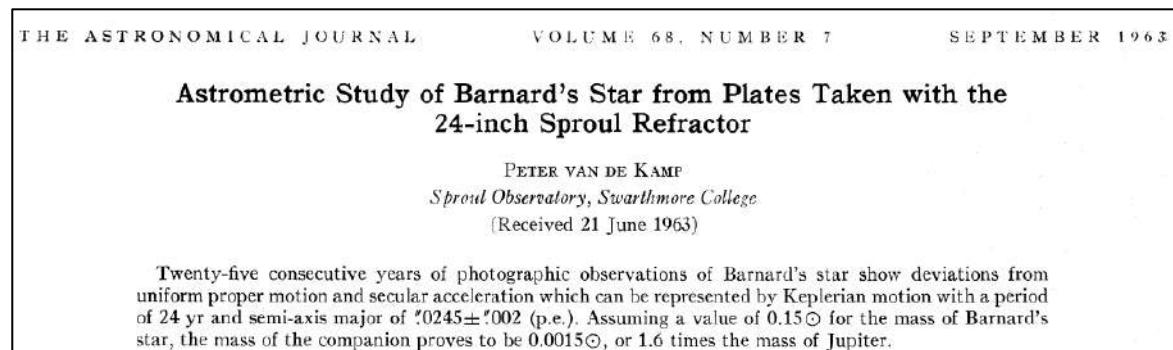
Orbital period = 16 years

Other announcements referring to the same system: Thomas J.J. See (1899) & Dirk Reuyl (1943)

- Other stars: Barnard's Star, Lalande 21185, 61 Cygni, etc



Peter van de Kamp
(1901-1995)



All these detections ended up being dismissed

Historical introduction

Radial velocities



Otto Struve
(1897-1963)

Proposal for a project of high-precision stellar radial velocity work The Observatory, Vol. 72, p. 199-200 (1952)

We know that *stellar* companions can exist at very small distances. It is not unreasonable that a planet might exist at a distance of 1/50 astronomical unit, or about 3,000,000 km. Its period around a star of solar mass would then be about 1 day.

There would, of course, also be eclipses. Assuming that the mean density of the planet is five times that of the star (which may be optimistic for such a large planet) the projected eclipsed area is about 1/50th of that of the star, and the loss of light in stellar magnitudes is about 0.02. This,

Precision ~ 750 m/s

A SEARCH FOR SUBSTELLAR COMPANIONS TO SOLAR-TYPE STARS

BRUCE CAMPBELL¹

Department of Physics and Astronomy, University of Victoria; and Dominion Astrophysical Observatory,
Herzberg Institute of Astrophysics

AND

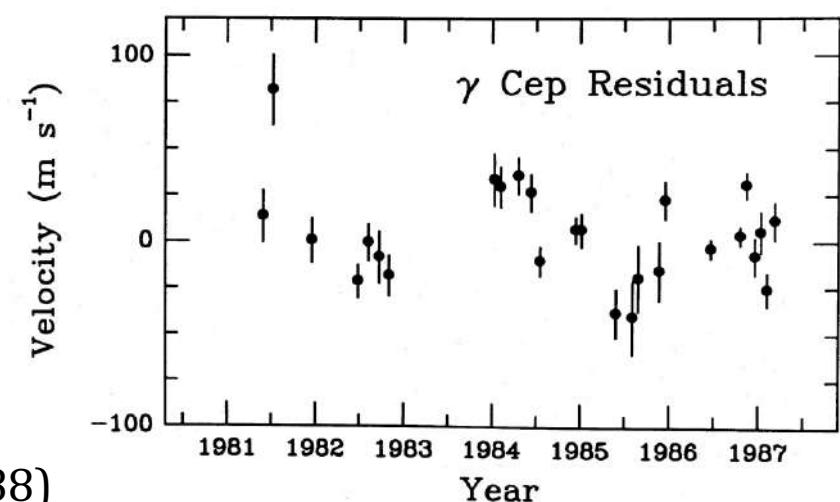
G. A. H. WALKER¹ AND S. YANG¹

Department of Geophysics and Astronomy, University of British Columbia

Received 1987 December 14; accepted 1988 February 4

Precision $\sim 10\text{-}15$ m/s

The Astrophysical Journal (1988)



Historical introduction

The unseen companion of HD114762: a probable brown dwarf

nature
International journal of science

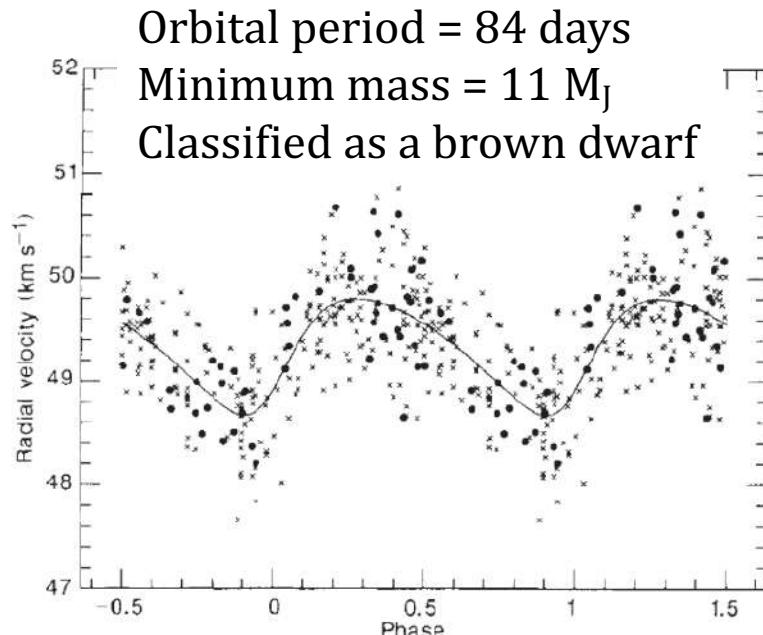
1989

David W. Latham*, Tsevi Mazeh†, Robert P. Stefanik*, Michel Mayor‡ & Gilbert Burki‡

* Harvard-Smithsonian Center for Astrophysics, 60 Garden Street, Cambridge, Massachusetts 02138, USA

† School of Physics and Astronomy, Raymond and Beverly Sackler Faculty of Exact Science, Tel Aviv University, Tel Aviv 69978, Israel

‡ Observatoire de Genève, Chemin des Maillettes 51, Ch-1290 Sauverny, Switzerland



A planetary system around the millisecond pulsar PSR1257+12

nature
International journal of science

1992

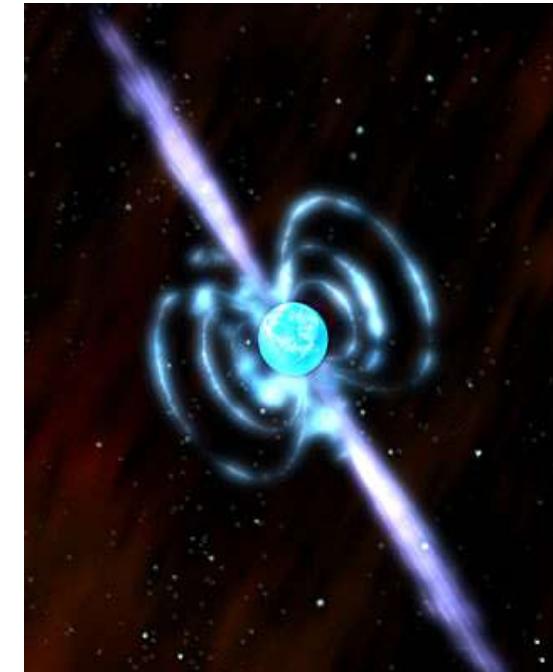
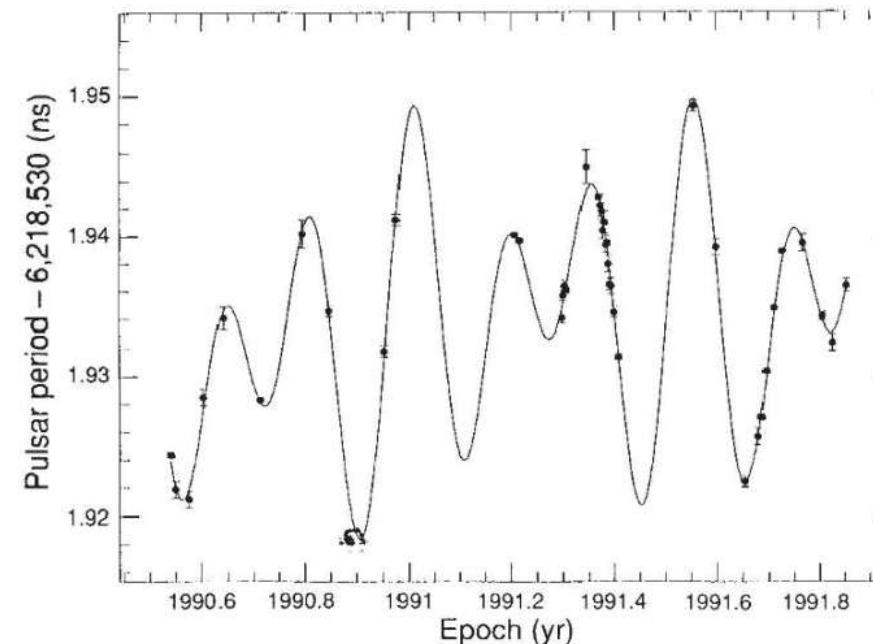
A. Wolszczan* & D. A. Frail†

* National Astronomy and Ionosphere Center, Arecibo Observatory, Arecibo, Puerto Rico 00613, USA

† National Radio Astronomy Observatory, Socorro, New Mexico 87801, USA

Millisecond pulsar
Radio observations (Arecibo)

2 planets $\geq 3 M_{\text{Earth}}$
Second generation planets?



Historical introduction

A Jupiter-mass companion to a solar-type star

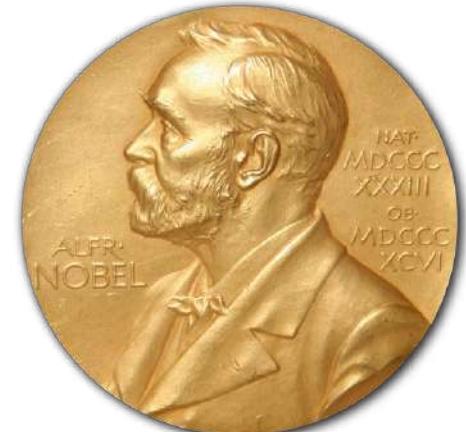
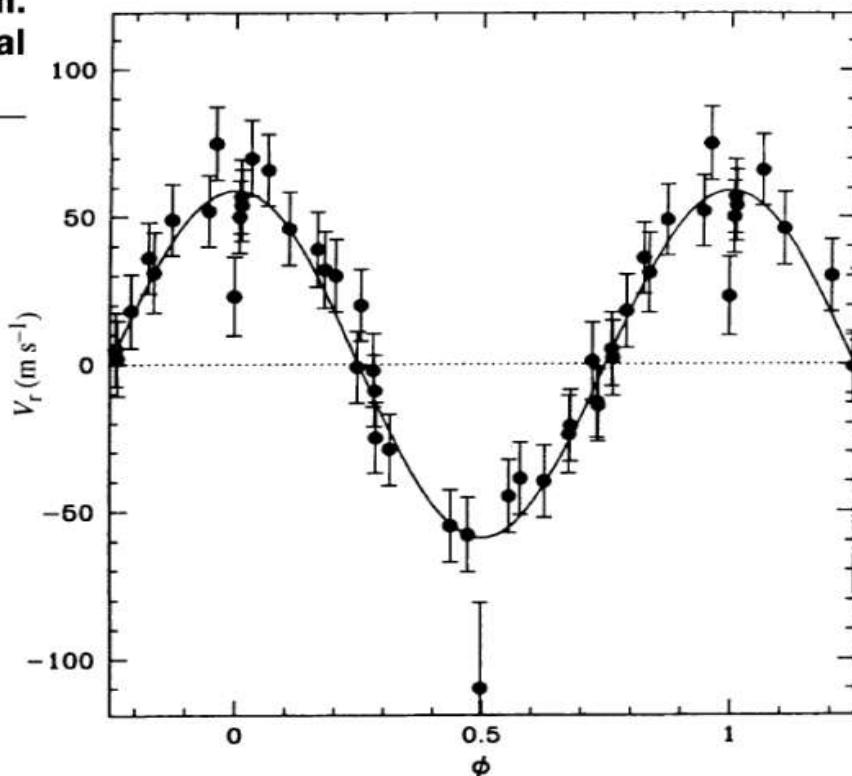
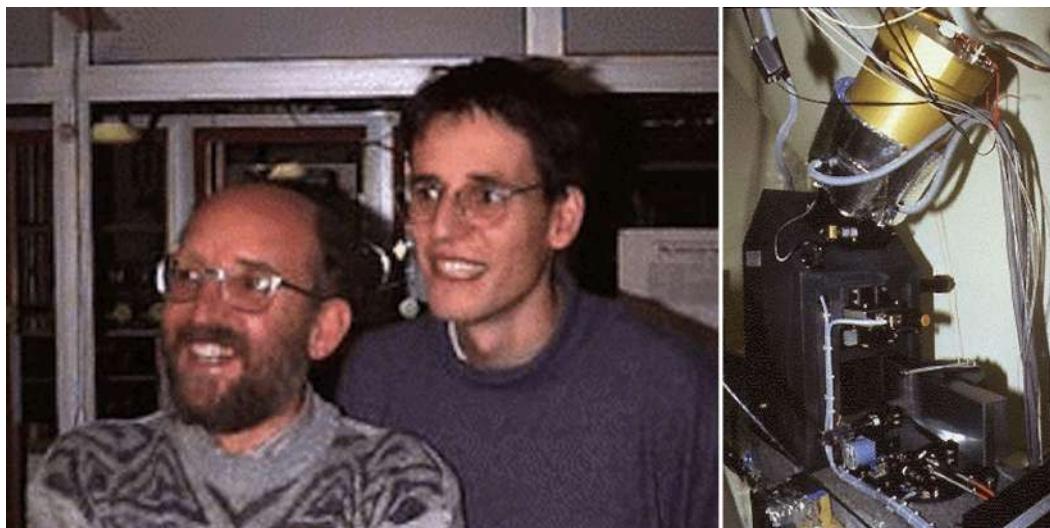
Michel Mayor & Didier Queloz

Geneva Observatory, 51 Chemin des Maillettes, CH-1290 Sauverny, Switzerland

The presence of a Jupiter-mass companion to the star 51 Pegasi is inferred from observations of periodic variations in the star's radial velocity. The companion lies only about eight million kilometres from the star, which would be well inside the orbit of Mercury in our Solar System. This object might be a gas-giant planet that has migrated to this location through orbital evolution, or from the radiative stripping of a brown dwarf.

NATURE · VOL 378 · 23 NOVEMBER 1995

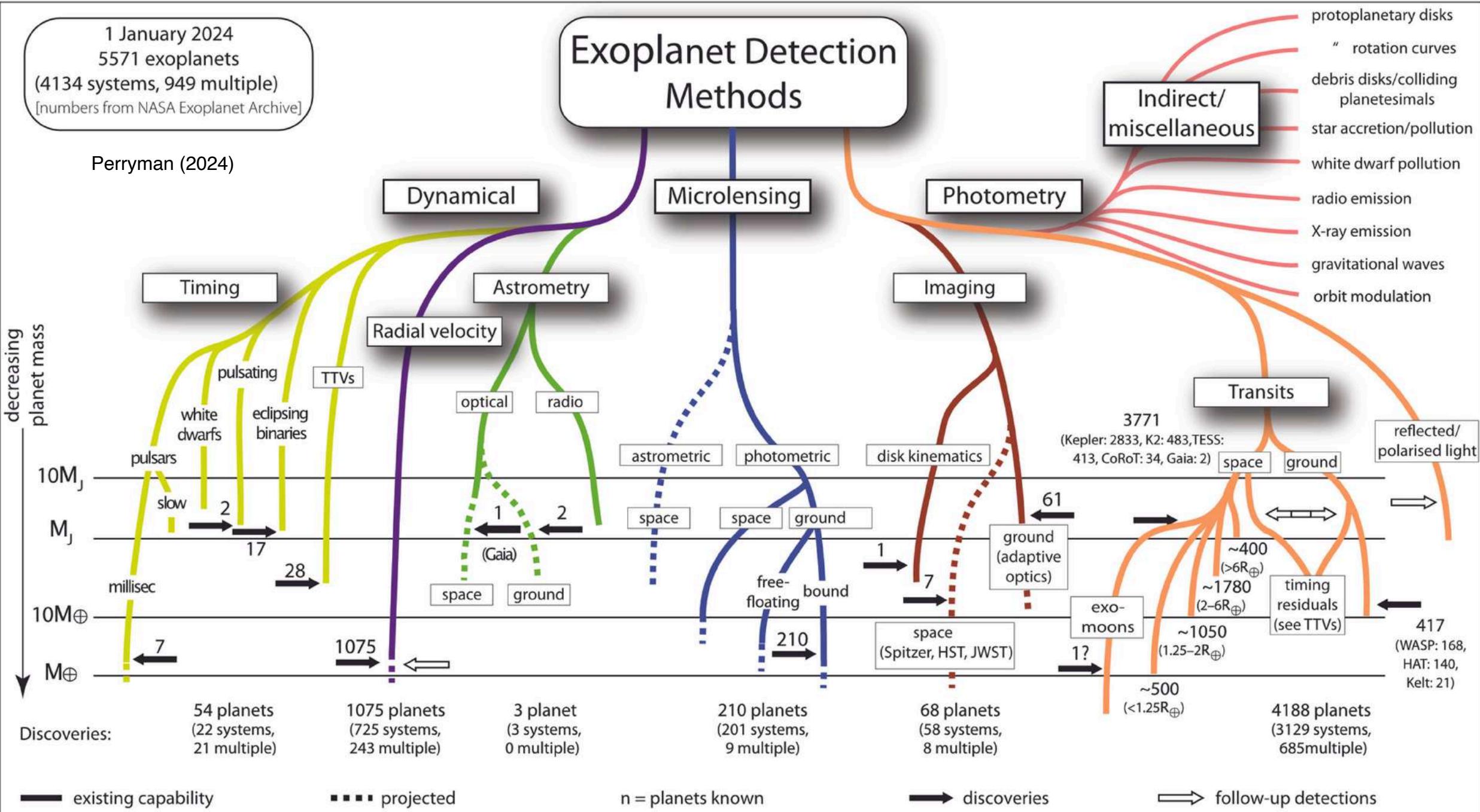
Precision
~10-15 m/s

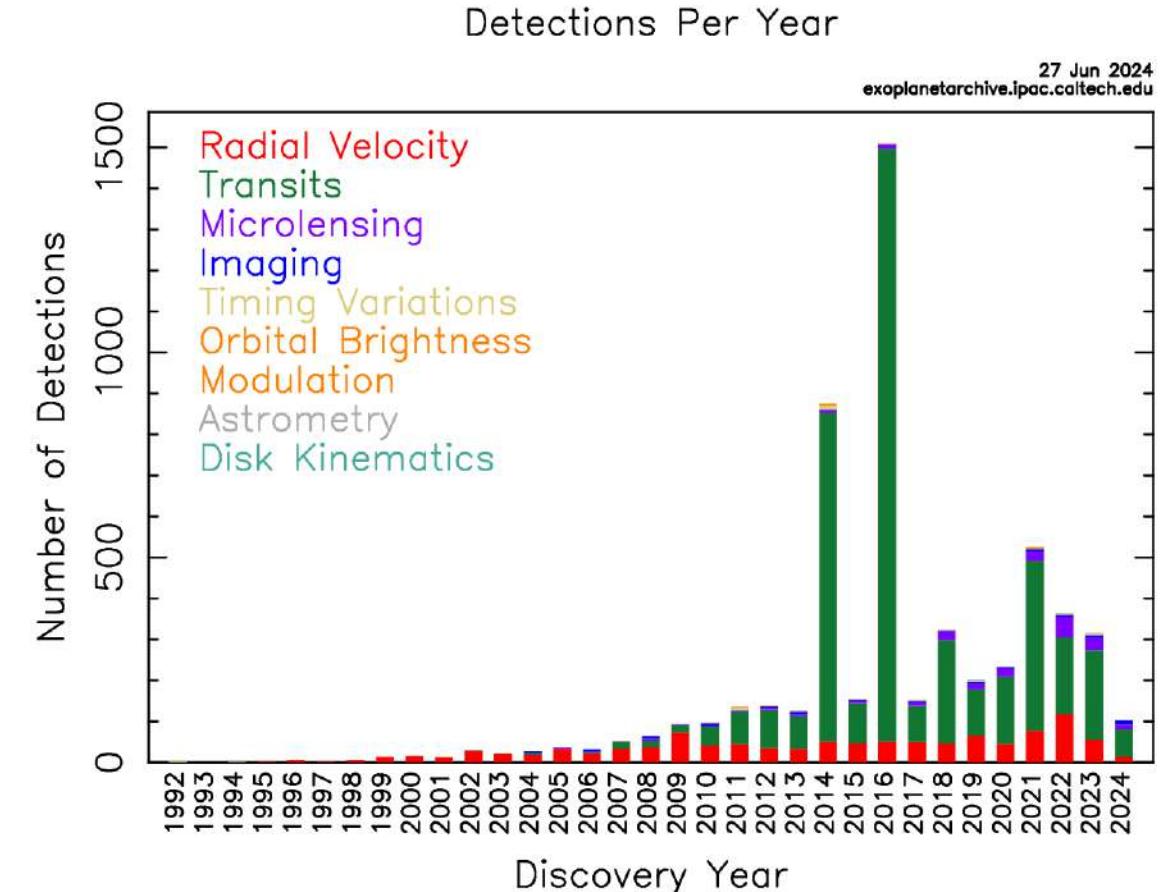
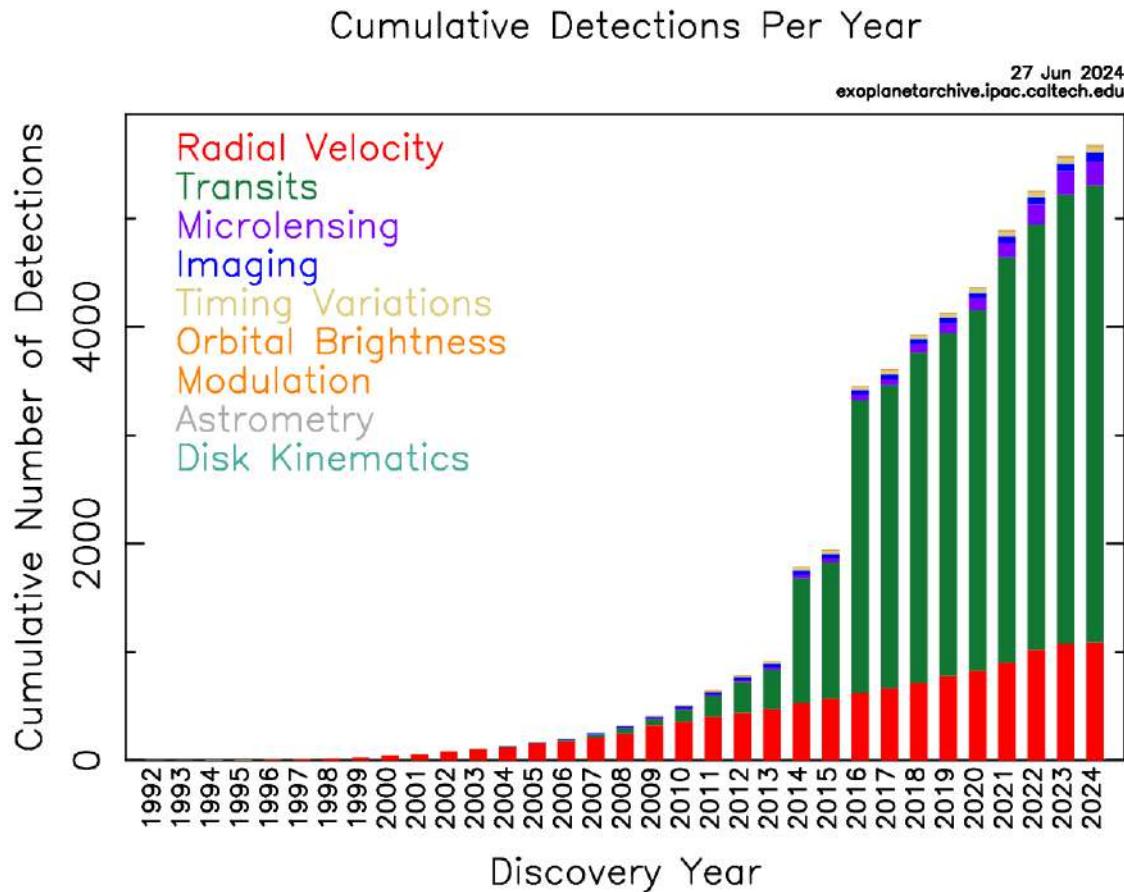


1 January 2024
5571 exoplanets
(4134 systems, 949 multiple)
[numbers from NASA Exoplanet Archive]

Perryman (2024)

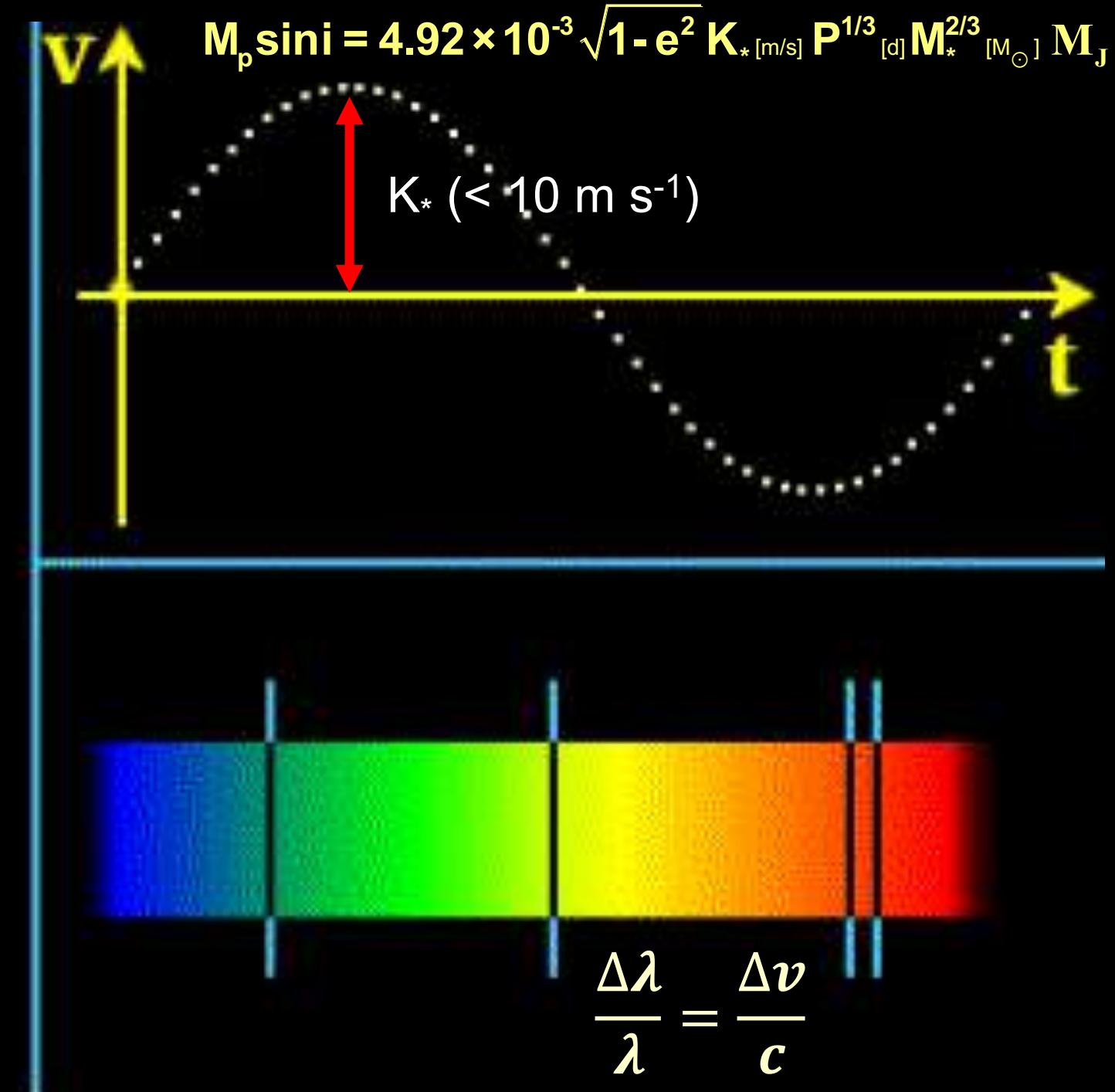
Exoplanet Detection Methods



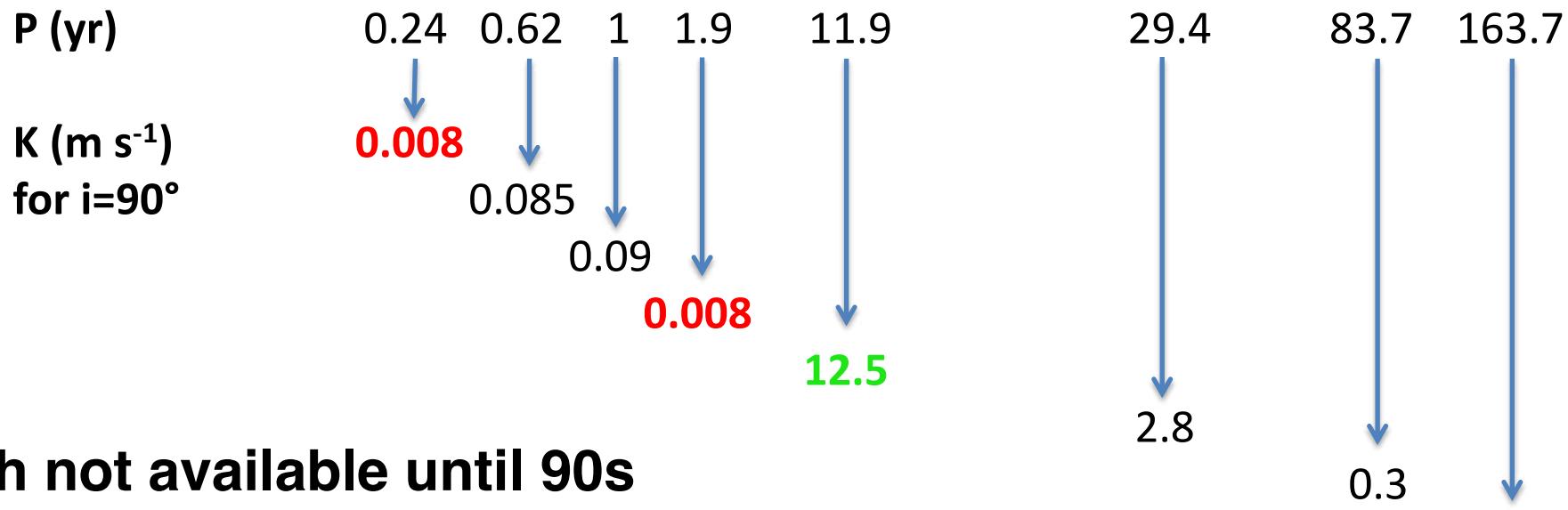


Source: NASA Exoplanet Archive

Radial velocities

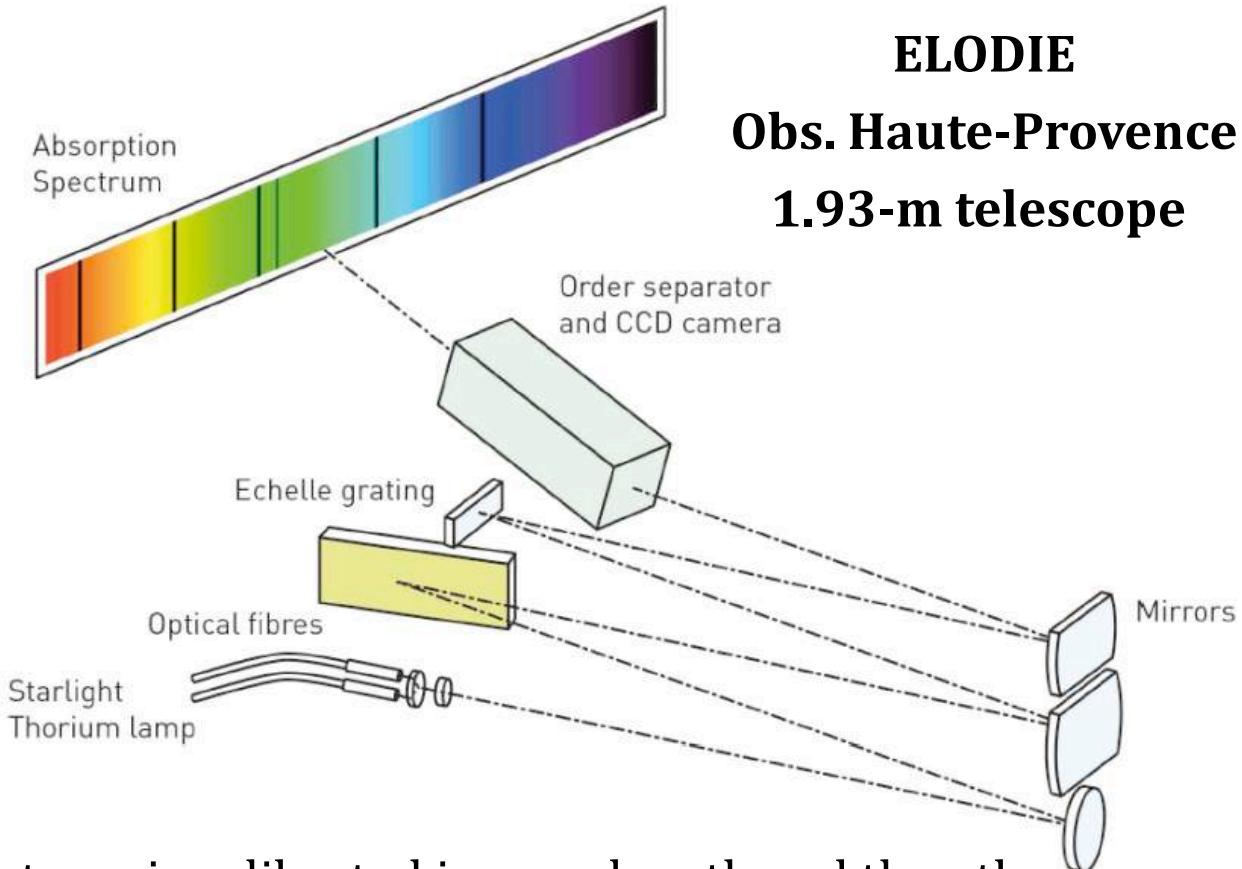


The radial velocity method

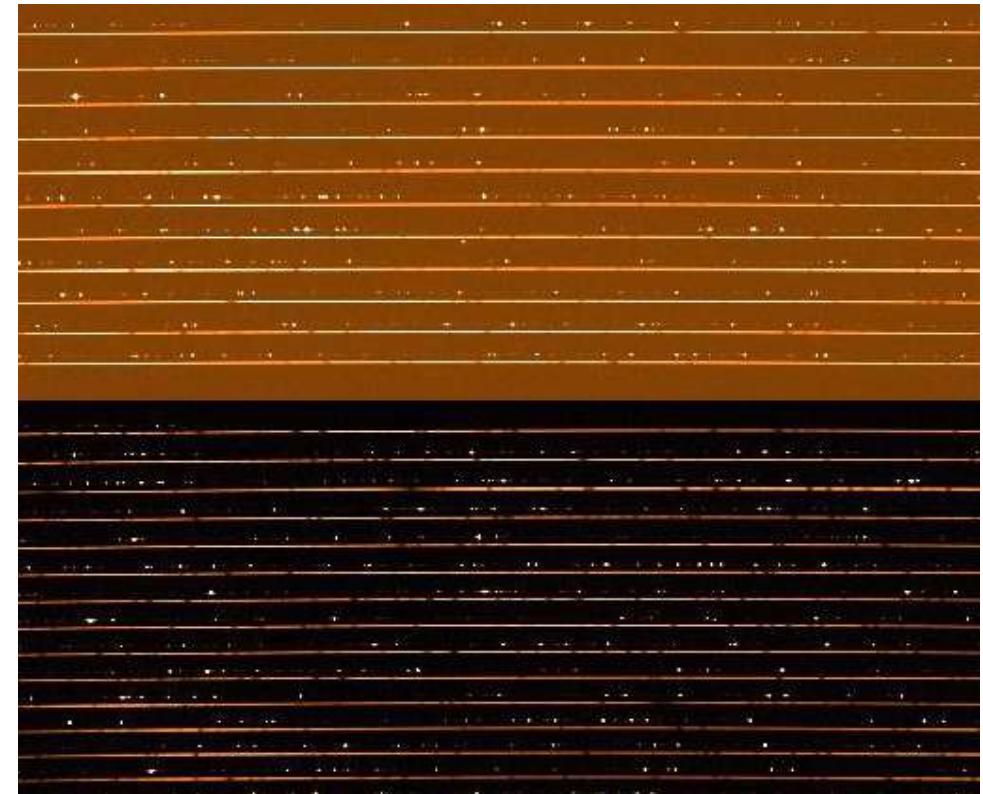


The instrument: spectrometer

Simultaneous calibration: A lamp sends light to the telescope and then it is transported to the spectrometer, together with the star light, using fibres

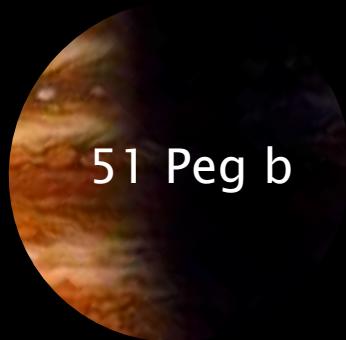


The spectrum is calibrated in wavelength and then the radial velocity is measured from cross-correlation



Cathode made from a heavy element
(Th, U) with a substrate gas (Ar, Ne)
→ narrow and stable emission lines

The first exoplanet!



51 Peg b

51 Pegasi b: a gas giant
close to its star (hot Jupiter)

Mercury



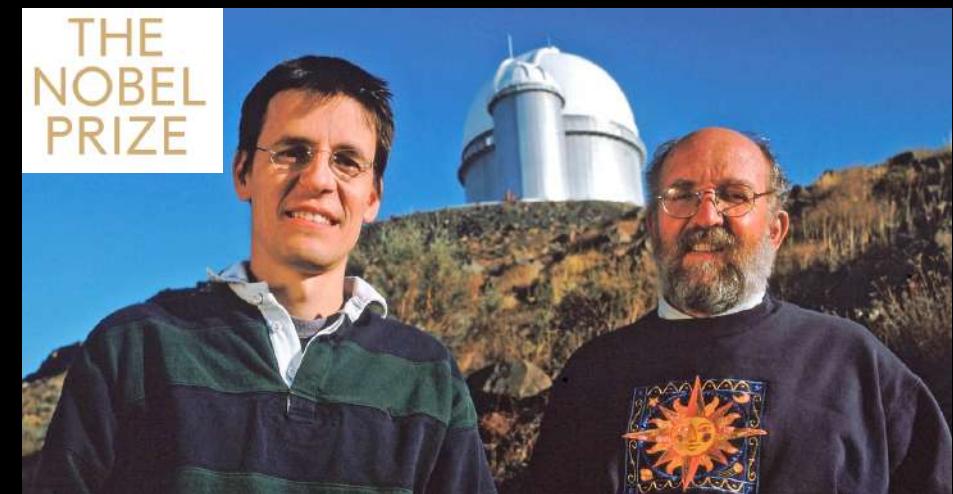
Venus



Earth



Solar System:
small rocky planets close to the Sun
gas/ice giants farther away



High-precision spectrometers (HARPS)

$$\Delta RV = 1 \text{ m/s}$$



$$\Delta\lambda = 2 \cdot 10^{-5} \text{ \AA}$$

- 15 nm on the detector
- 1/1000 pixel
- 30 Si atoms

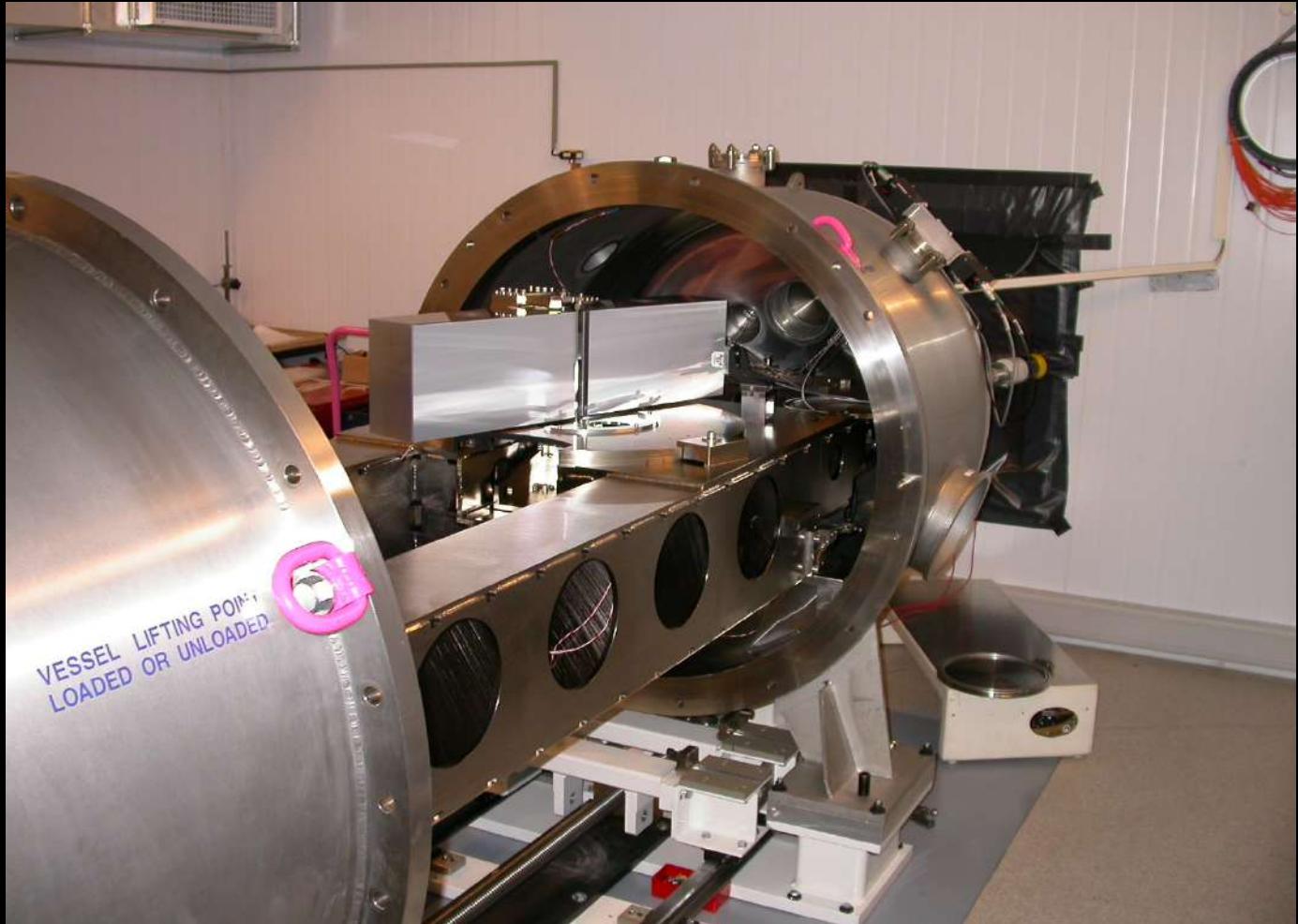


$$\rightarrow \Delta T = 0.001 \text{ K}$$

$$\rightarrow \Delta P = 0.01 \text{ mbar}$$



**Pressure and
temperature control**



carmenes



carmenes

- 3.5-m @ CAHA
 - VIS (520-970 nm) & NIR (970-1710 nm) channels
 - Goal: low-mass planets in M-dwarfs



VIS



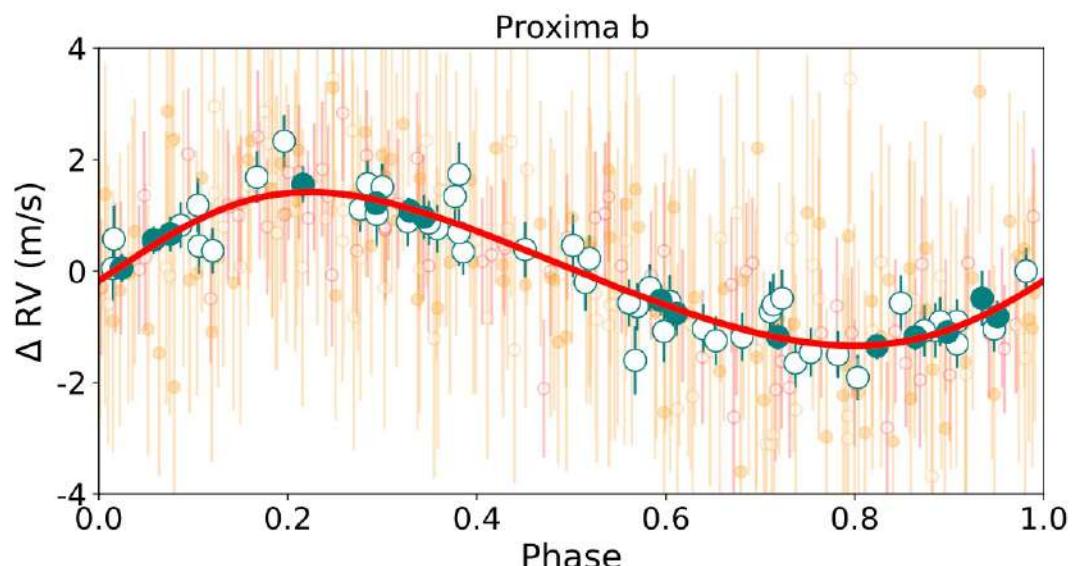
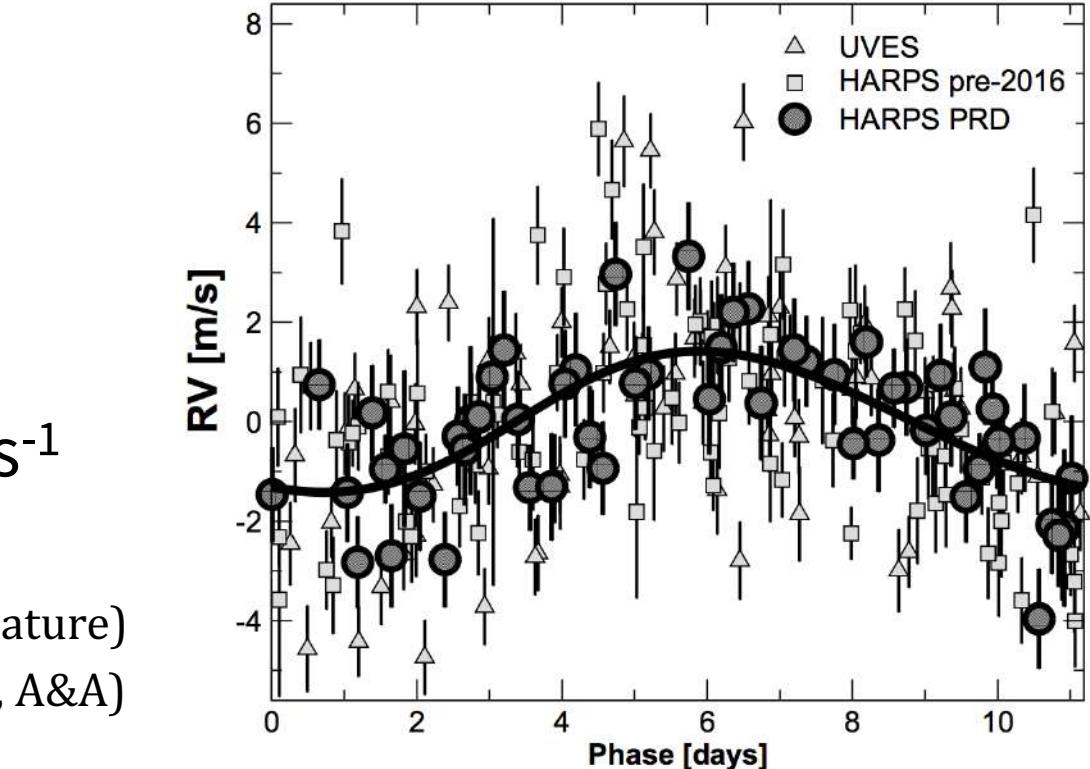
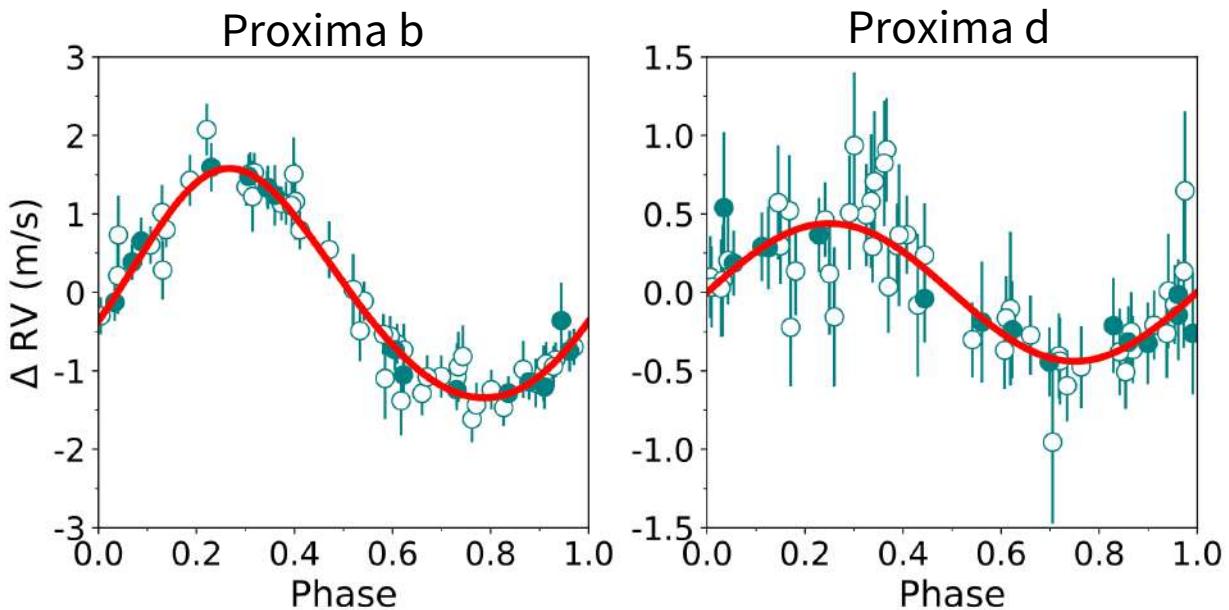
NIR

Proxima Centauri

Nearest neighbor has planets!

- ⇒ Proxima b (HARPS) $K = 1.5 \text{ m s}^{-1}$
- ⇒ Proxima d (ESPRESSO) $K = 0.35 \text{ m s}^{-1}$

Anglada-Escudé et al. (2016, Nature)
Suárez-Mascaño et al. (2020, A&A)



Keplerian motions & stellar activity

SPOTLESS project

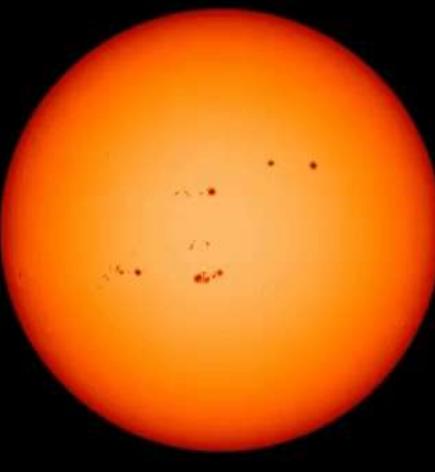


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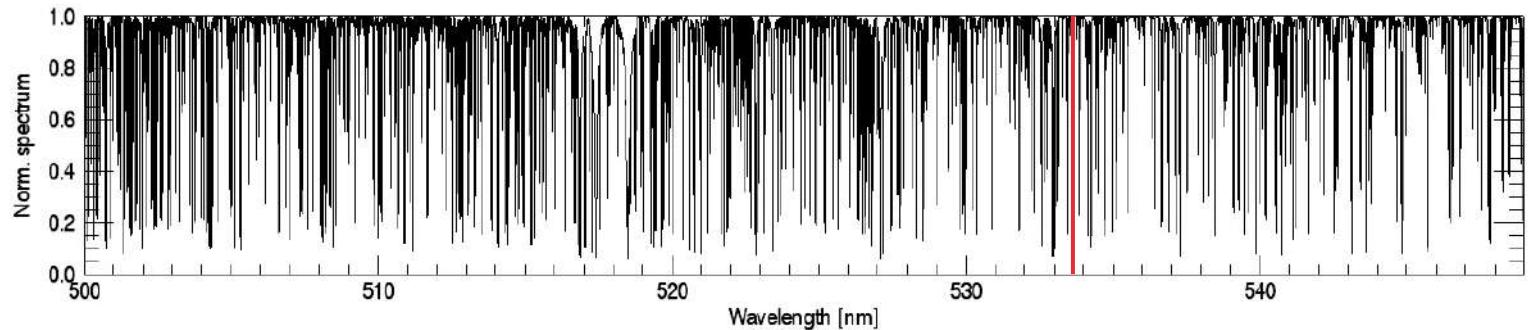
Photosphere - 617 nm



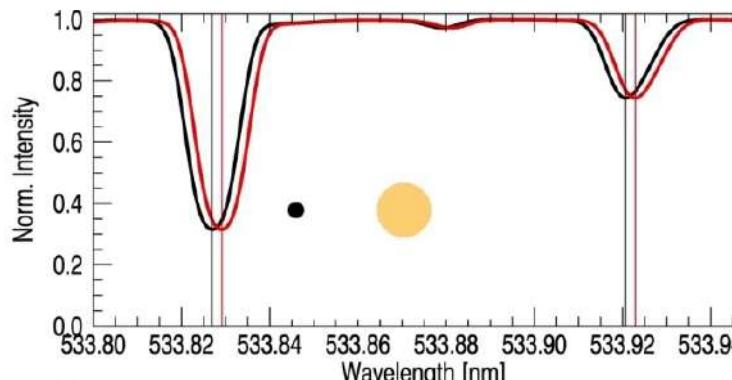
Chromosphere - 171 nm



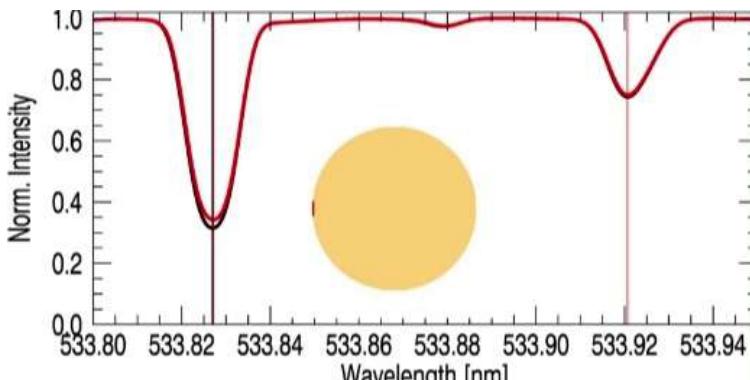
NASA's Solar Dynamics Observatory



Planet-induced Doppler shifts are invariant from line to line

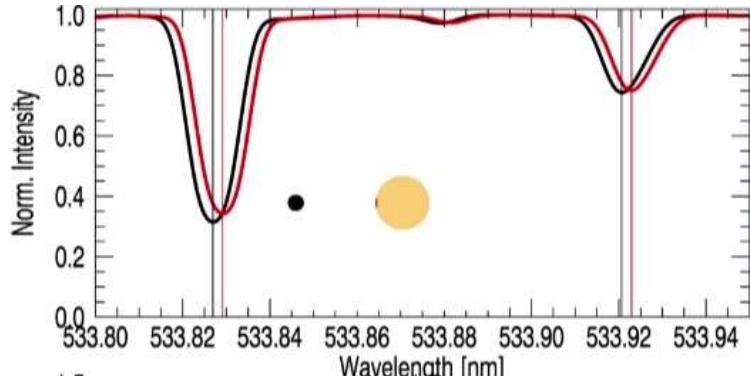


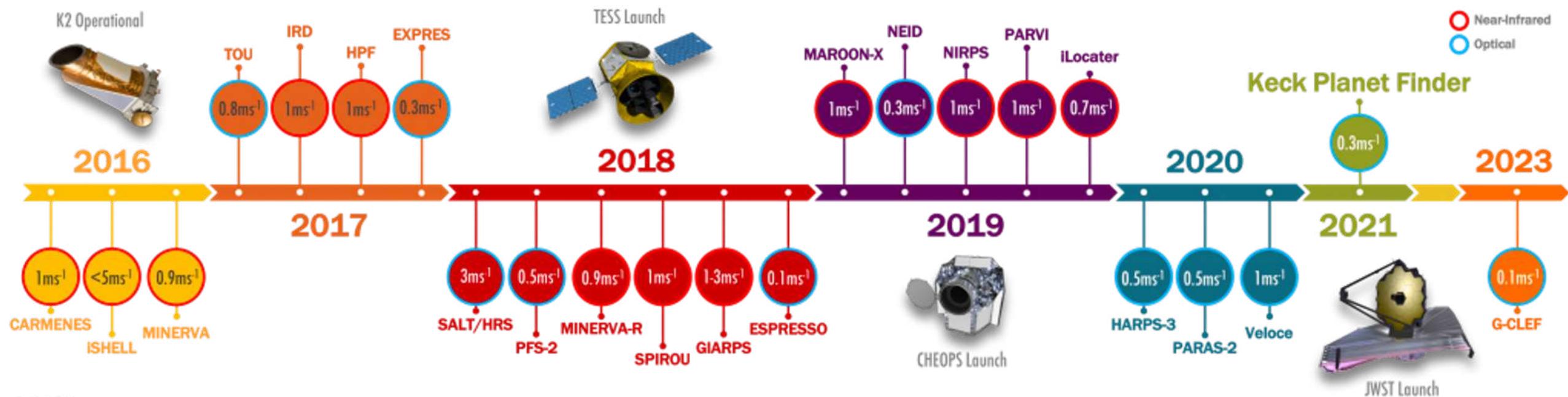
Activity-driven changes are local to individual spectral lines



RV measurements generally use an **average** profile for all lines, ignoring **unknown** shape changes expected for individual lines

Observations





Arpita Roy
From Wright & Robertson 2017

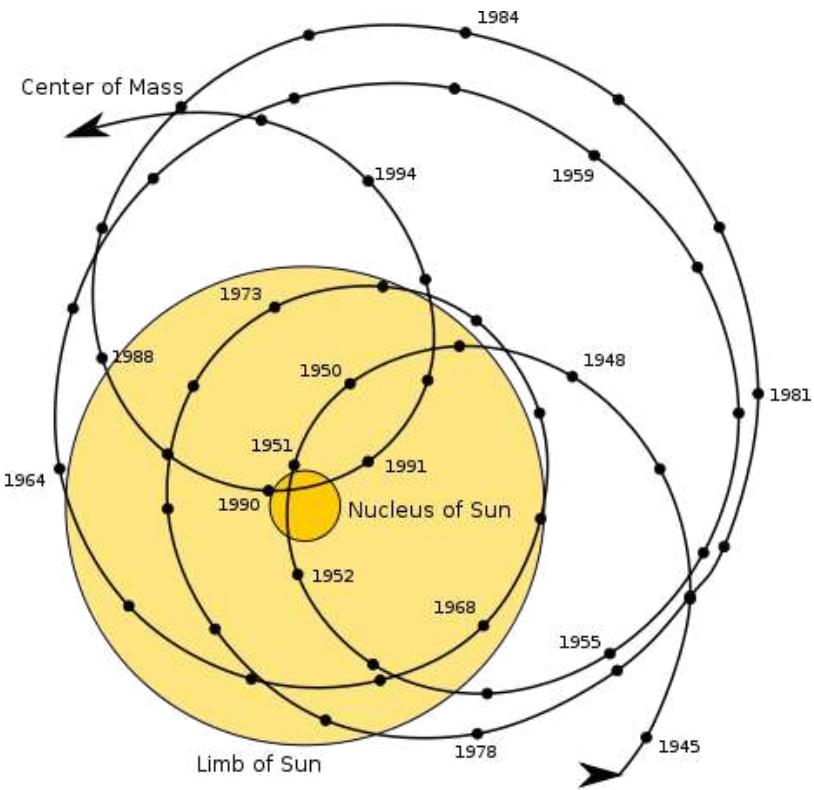
ADDITIONAL:

Ongoing:
HARPS
HARPS-N
(APF, PFS, SOPHIE, CORALIE,...)

Planned:
MARVEL
ANDES
GTC-CHORUS

The astrometric method

Motion of the star on the plane of the sky (circular orbit)

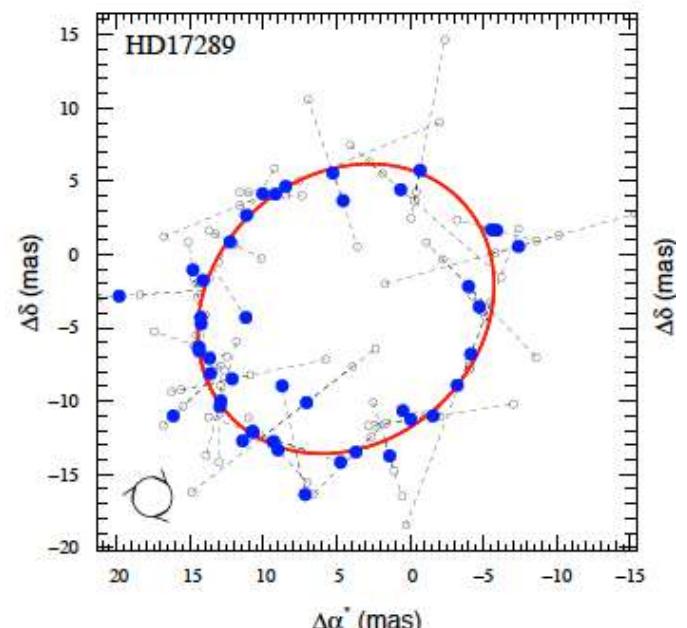
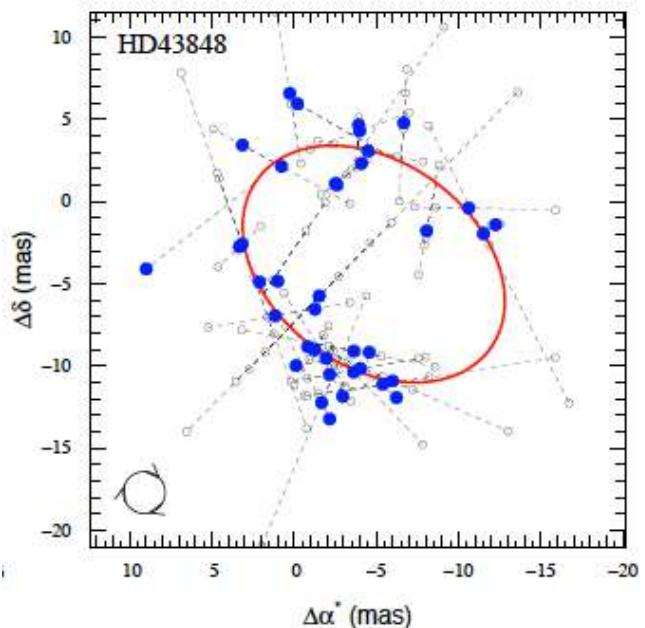


$$\theta = \frac{a}{d} \frac{m_p}{m_*} = \left(\frac{G}{4\pi^2} \right)^{1/3} \frac{m_p}{m_*^{2/3}} \frac{P^{2/3}}{d}$$

$$\theta = 5 \text{ mas} \frac{m_p}{M_J} \left(\frac{m_*}{M_{\text{sun}}} \right)^{-2/3} \left(\frac{P}{11.8 \text{ yr}} \right)^{2/3} \left(\frac{d}{\text{pc}} \right)^{-1}$$

$$\theta = 3 \mu\text{as} \frac{m_p}{M_{\oplus}} \left(\frac{m_*}{M_{\text{sun}}} \right)^{-2/3} \left(\frac{P}{1 \text{ yr}} \right)^{2/3} \left(\frac{d}{\text{pc}} \right)^{-1}$$

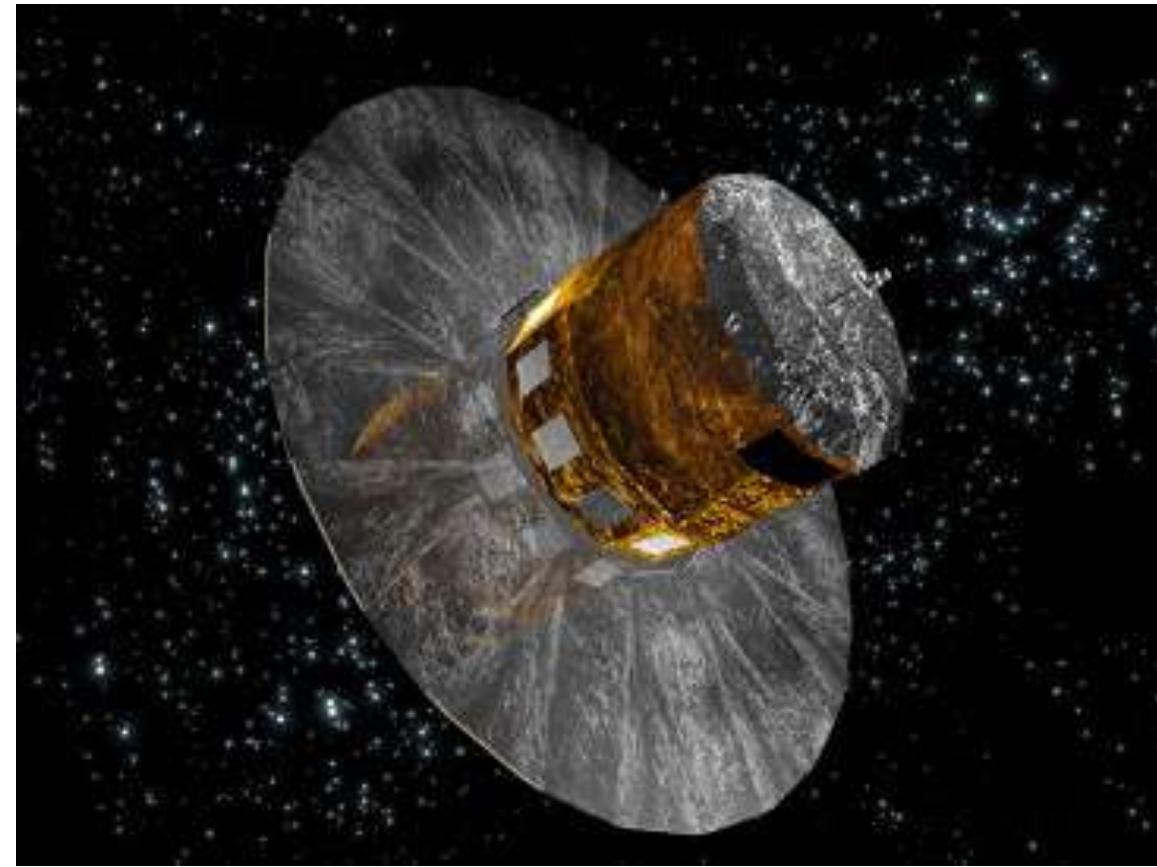
$m_p \ll m_*$



The astrometric method: the future

Gaia

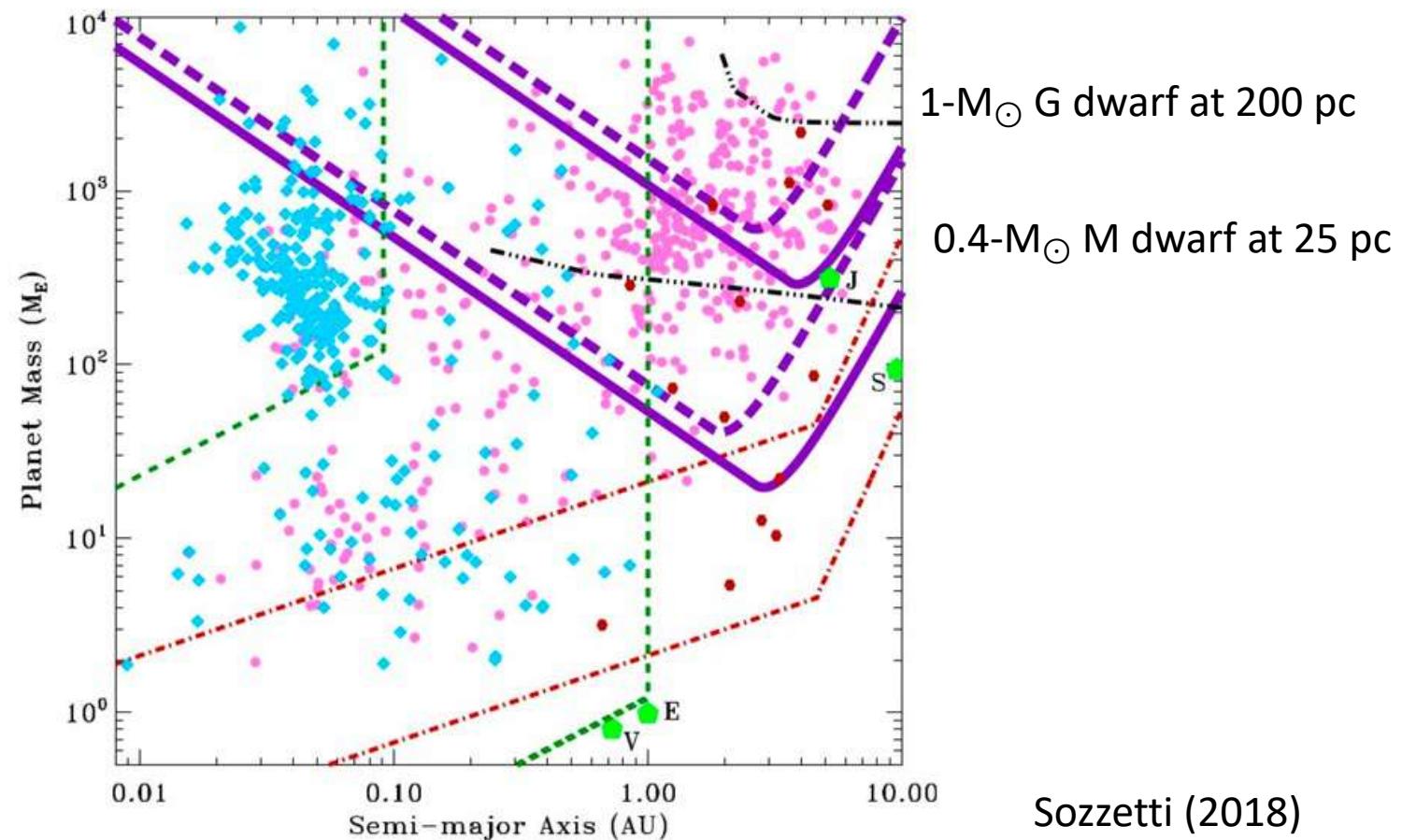
- ESA mission
- Launched on Dec 19th, 2013
- 2 telescopes of 1.45-m aperture
- Additional telescope for spectroscopy
- Orbit: Earth-Sun L2 point
- Positions and motions **for over 10^9 stars**
- Photometry + astrometry + RV for 10^6 stars
- Maximum magnitude ~ 20
- For each star: ~70 measurements over 5 years
- Astrometric precisions:
 - 20 μ as @ mag 15
 - 200 μ as @ mag 20



Angle between the fields: 106.5°
At the end, absolute position measurements

The astrometric method: the future

Gaia



Expected harvest: ~1000 long-period massive planets
Strong constraints on the frequency of Jupiter analogs

Gaia DR4 release
date: 2026

The timing method

Principle: delay or advance of a periodic signal due to the orbital motion of the source and the finite speed of light (*light travel time*)

Targets = source with a very stable periodic signal:

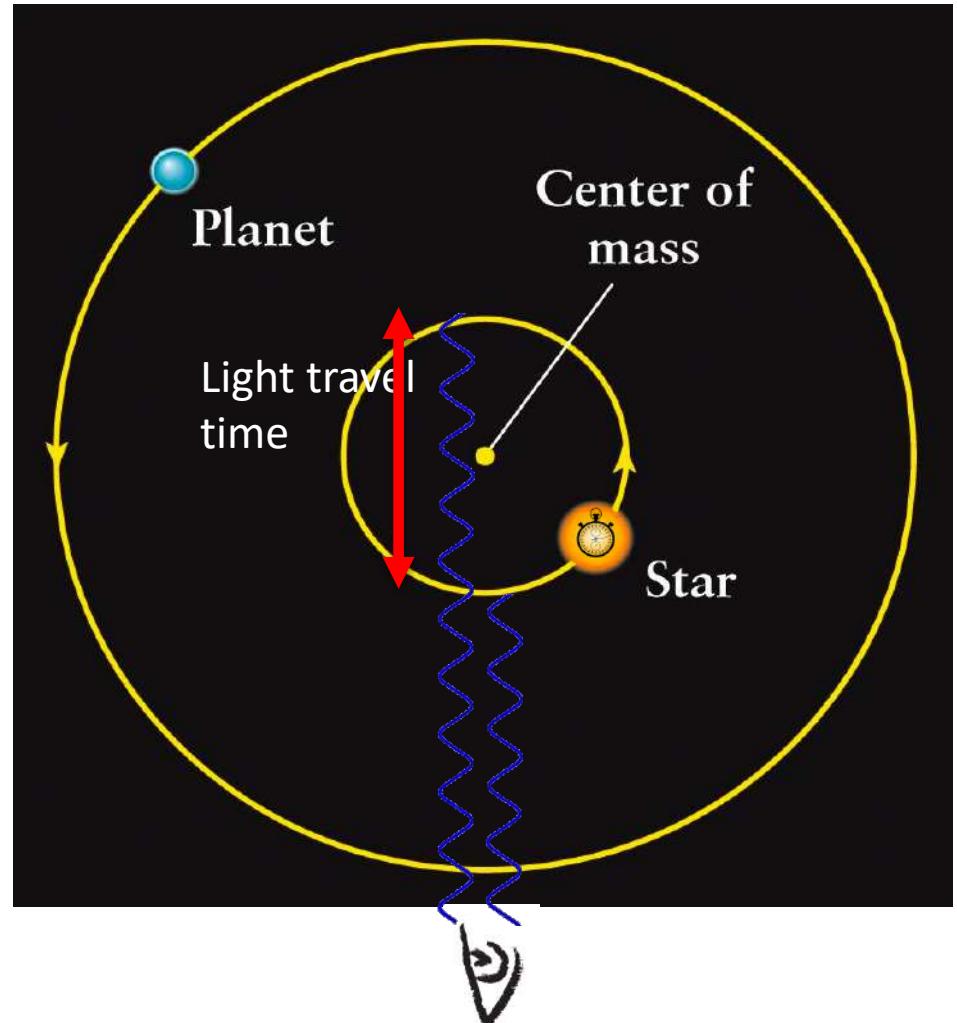
- pulsars
- pulsating stars
- eclipsing binaries

Amplitude :
$$\Delta t = \frac{1}{c} \frac{a \times M_p \sin i}{M_*}$$

Earth + Sun = 1.5 ms
Jupiter + Sun = 2.5 s

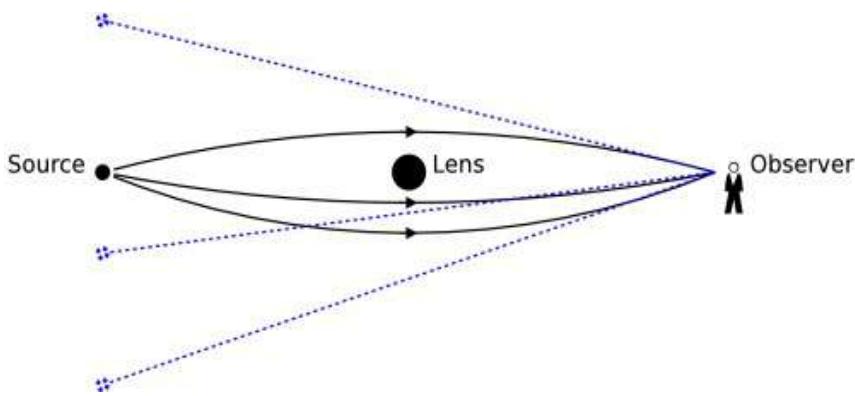
$$\Delta T = \frac{a_{12} \sin i_3}{c} \left[\frac{1 - e_3^2}{1 + e_3 \cos \nu_3} \sin (\nu_3 + \omega) + e_3 \sin \omega \right]$$

Irwin (1959)



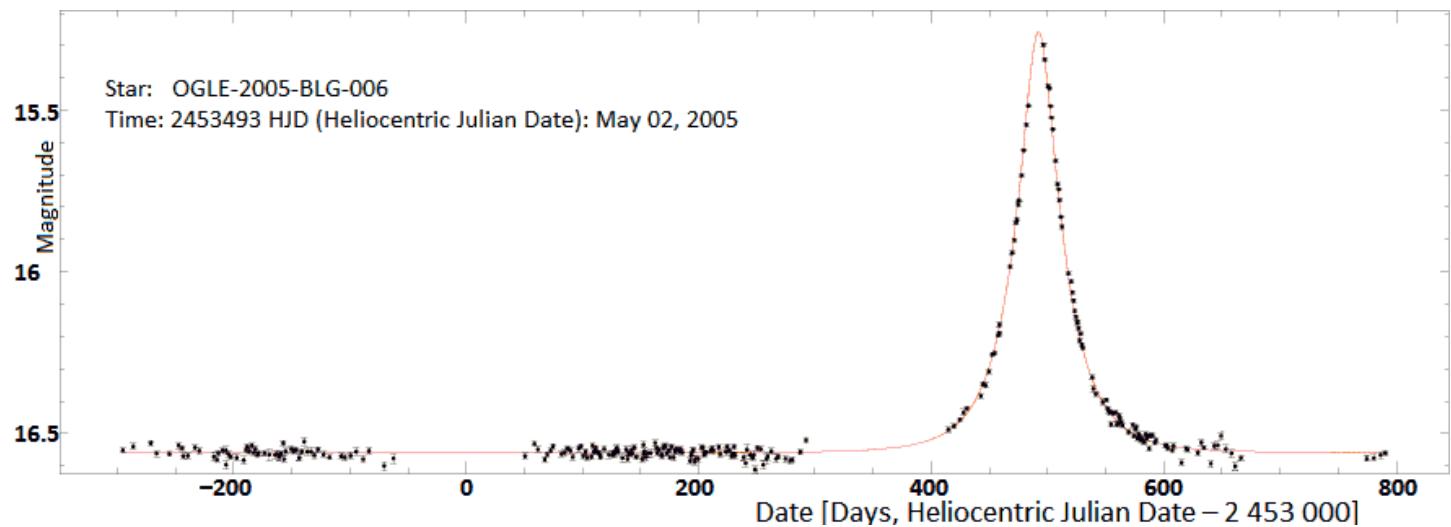
The gravitational microlensing method

Principle: General Relativity predicts that light rays are deflected by gravitational fields. The light of a distant **source** grazing a **lens** (e.g. star, planet) can be deflected towards Earth. The source appears then brighter.



The different images of the source are not resolved. The most significant effect is photometric.

- **Required alignment** ~ 1 mas \rightarrow very rare. Detection makes it necessary to observe very dense stellar fields.
- **Typical source:** 1 star of the galactic bulge at ~ 8 kpc
- **Typical lens:** 1 star of the galactic disk ~ 4 kpc
- **Typical duration:** determined by the relative motion of the two stars. A few weeks to a few months. **ONE TIME ONLY!**



The gravitational microlensing method

$$\theta_E \approx 0.4 \left(\frac{M_L}{0.3 M_{Sun}} \right)^{1/2} \left(\frac{D_L}{2 \text{kpc}} \right)^{-1/2} \left(\frac{D_{LS}}{D_S} \right)^{1/2} \text{mas},$$

$$R_E = \theta_E D_L \approx 2.2 \left(\frac{M_L}{0.3 M_{Sun}} \right)^{1/2} \left(\frac{D_L}{2 \text{kpc}} \right)^{1/2} \left(\frac{D_{LS}}{D_S} \right)^{1/2} \text{au}$$

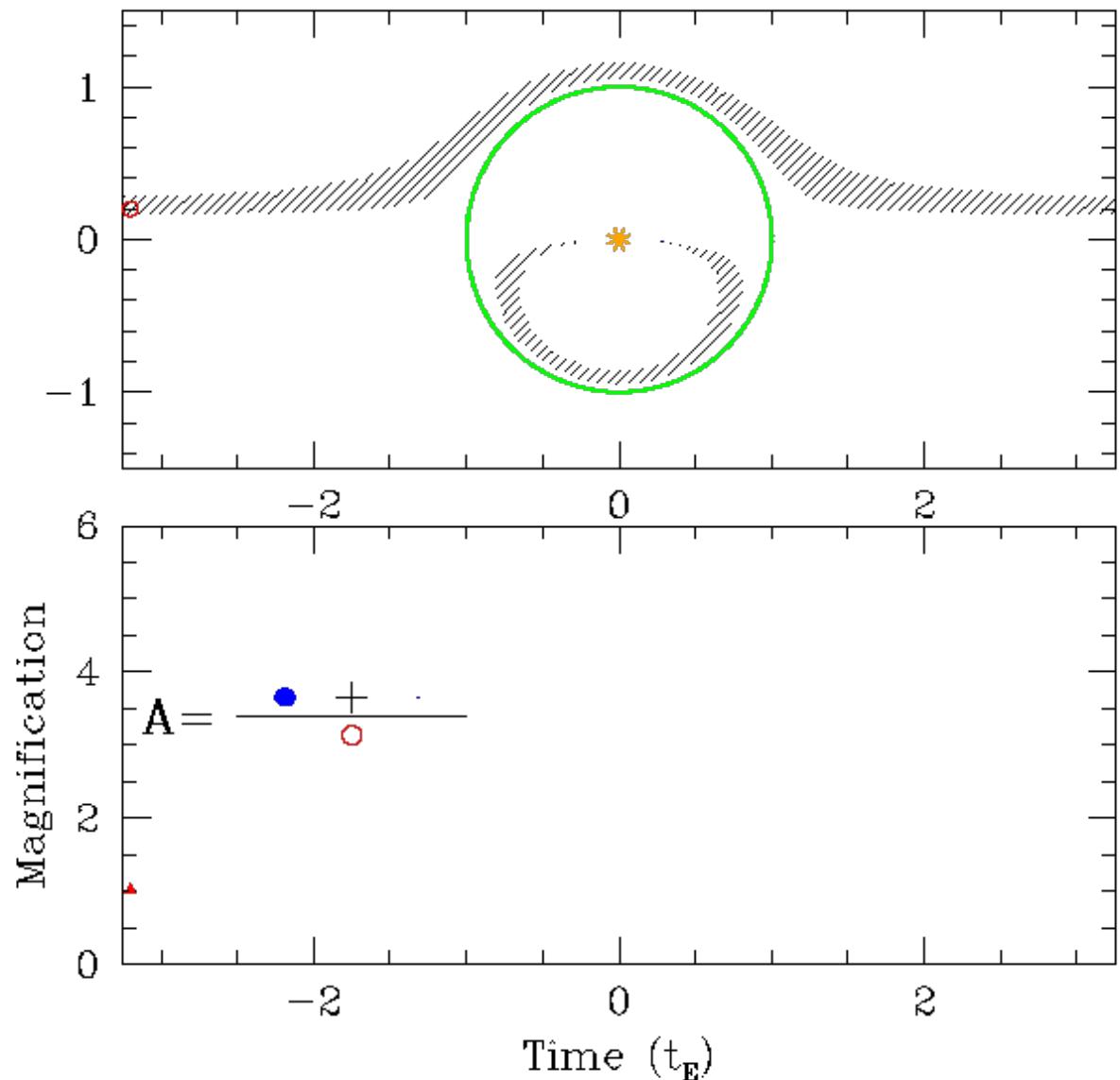
For a typical stellar lens, the Einstein ring corresponds to the size of a planetary system

Magnification A

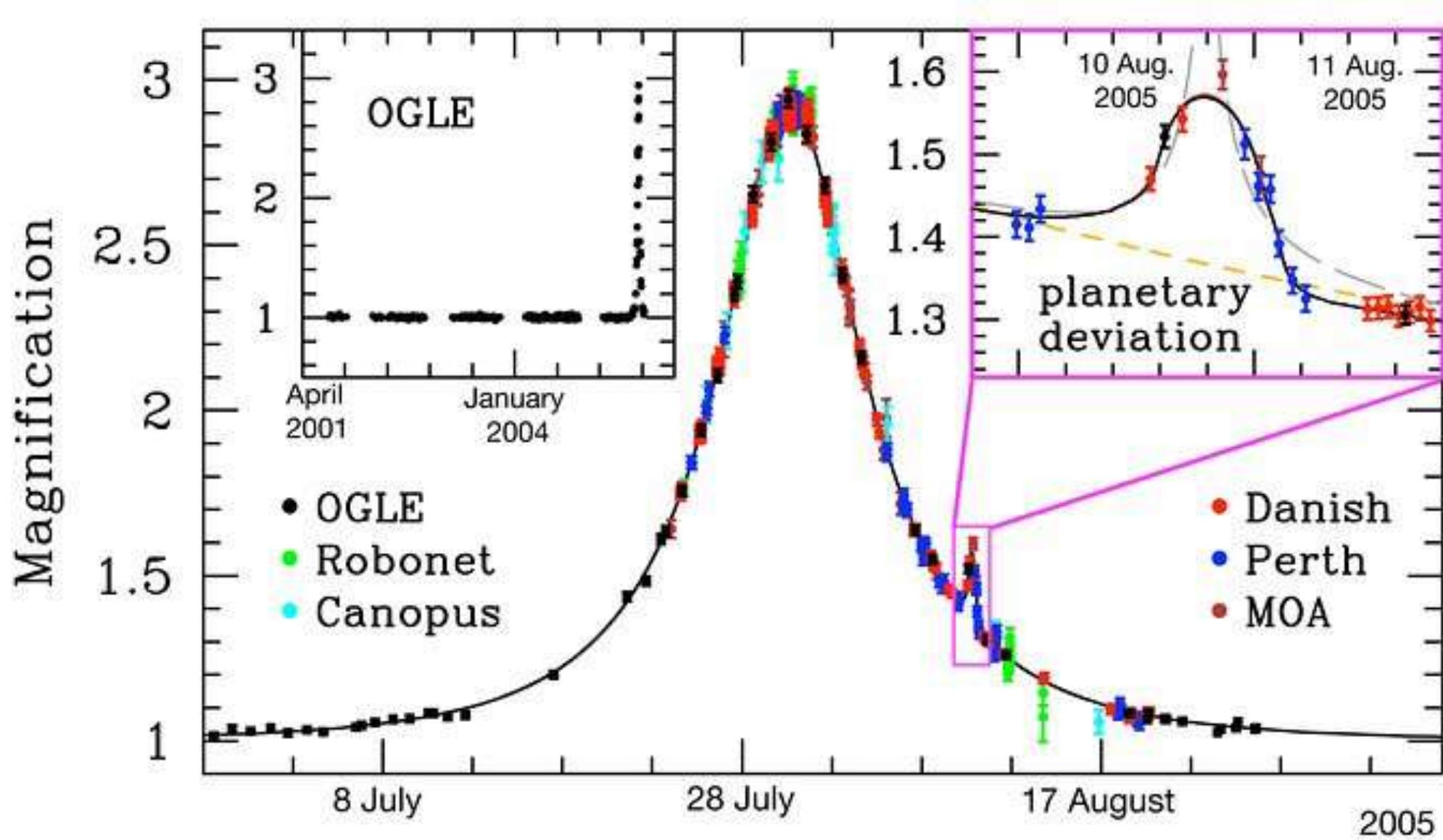
$$A = \frac{u^2 + 2}{u\sqrt{u^2 + 4}}, u \equiv \frac{\theta_S}{\theta_E}$$

Lensing preserves surface brightness but changes surface

Maximum recorded: $A = 3000$



The gravitational microlensing method



Transits

- Transit parameters:

➤ Period $P^2 M_* = a^3$

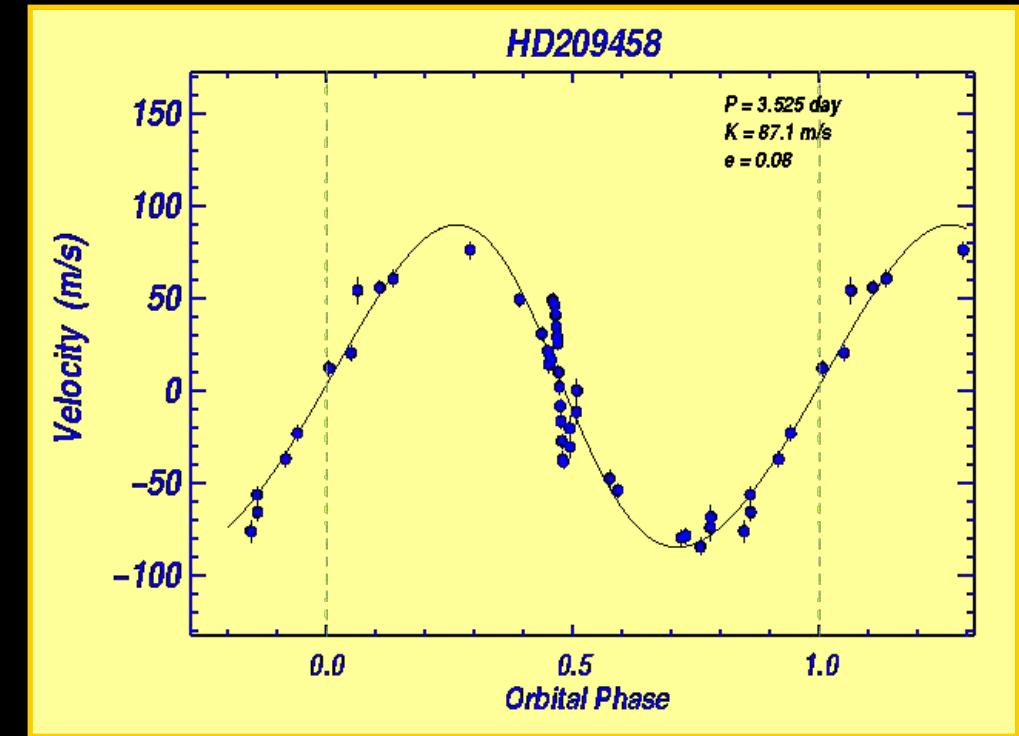
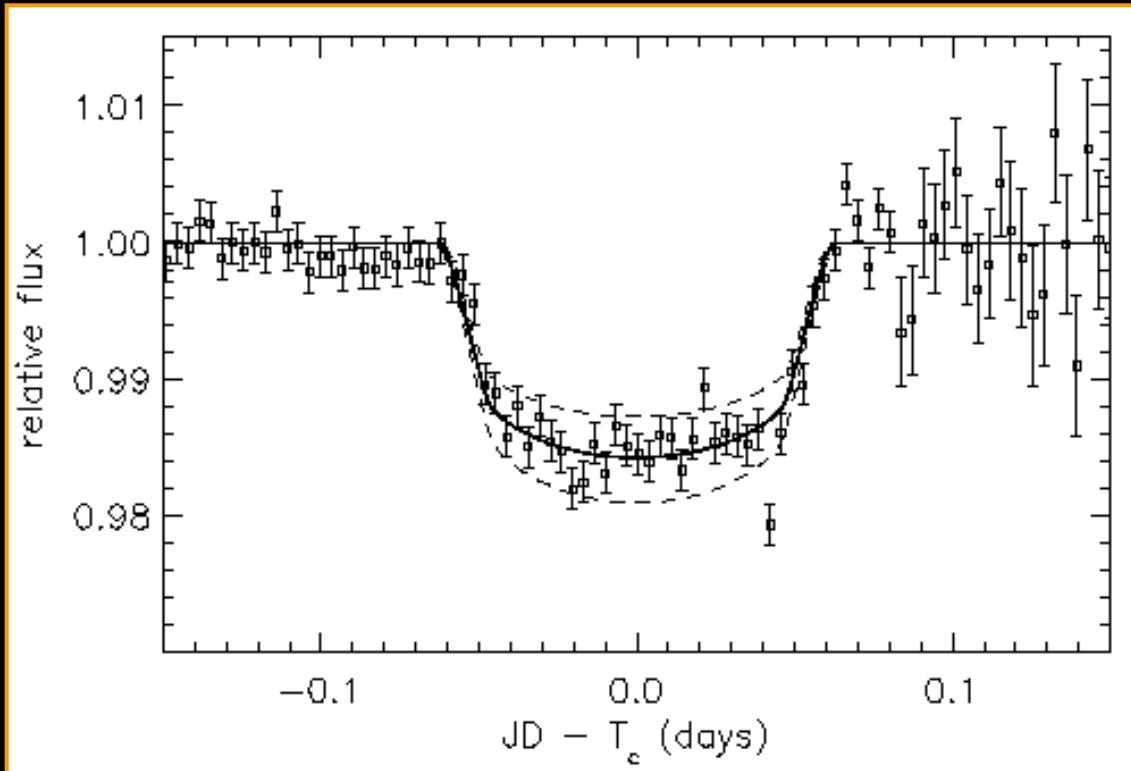
➤ Depth $\Delta f \approx \left(\frac{R_p}{R_*} \right)^2$

➤ Duration
 $\tau_c = 26 R_* \sqrt{\frac{a}{M_*}} \cong 13\sqrt{a}$ hrs

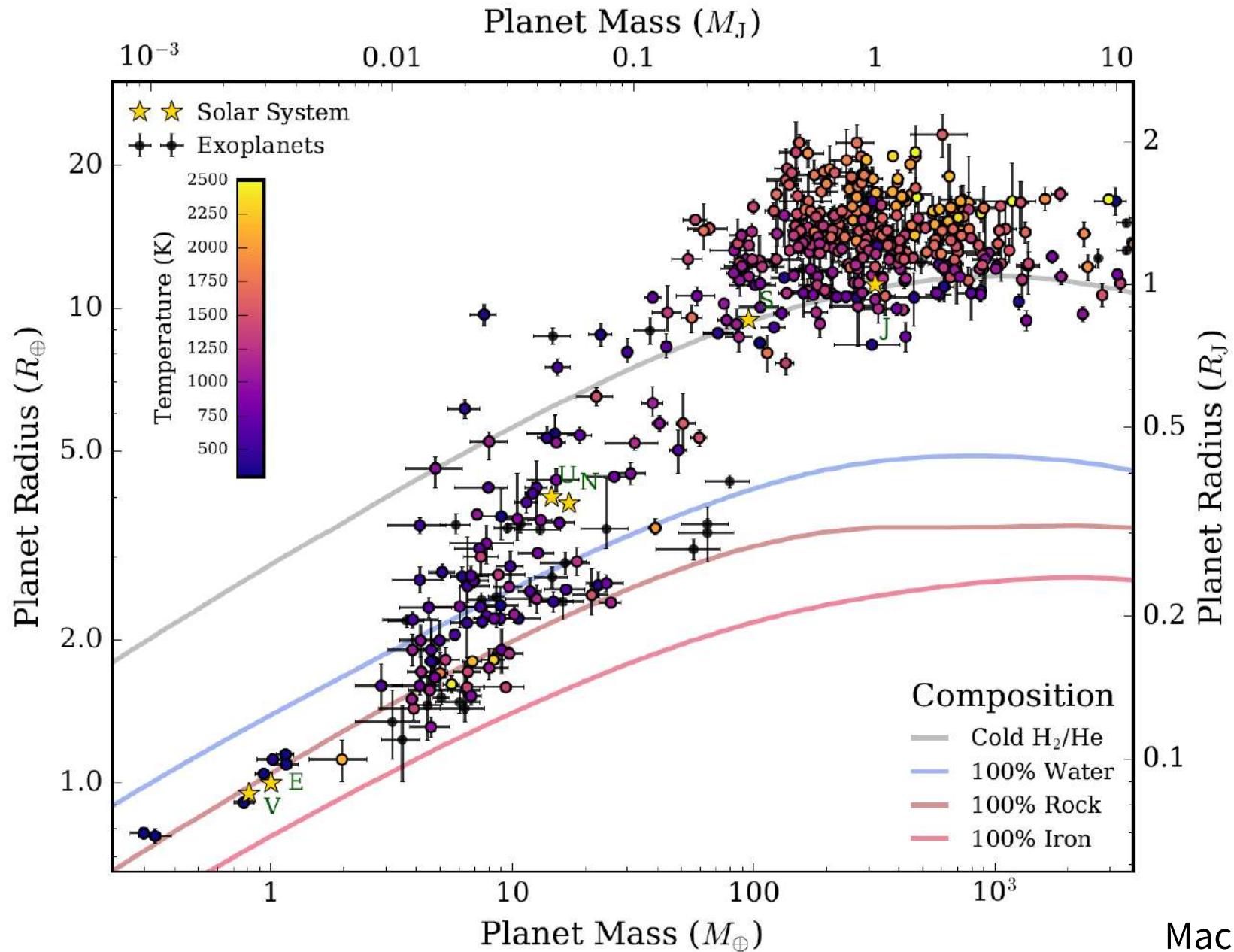


First in 1999: planet already known
from radial velocities - HD 209458
(David Charbonneau)

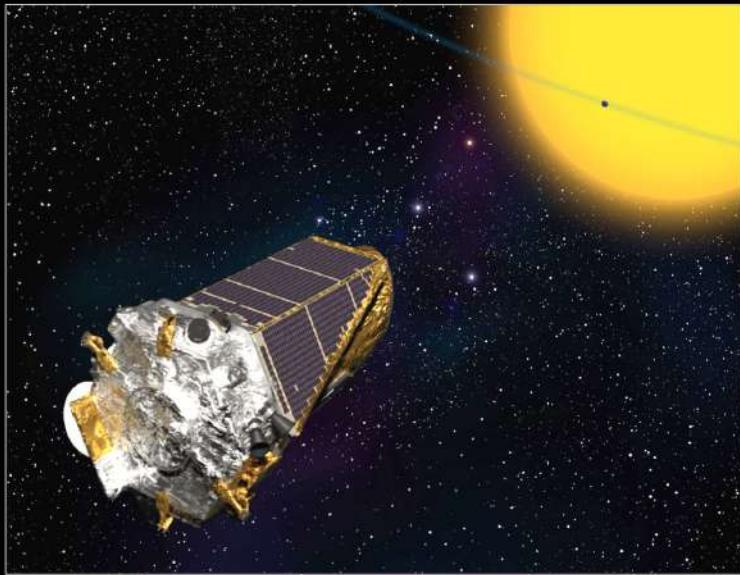
↳ Depth of 1-2% for
Jupiter-Sun



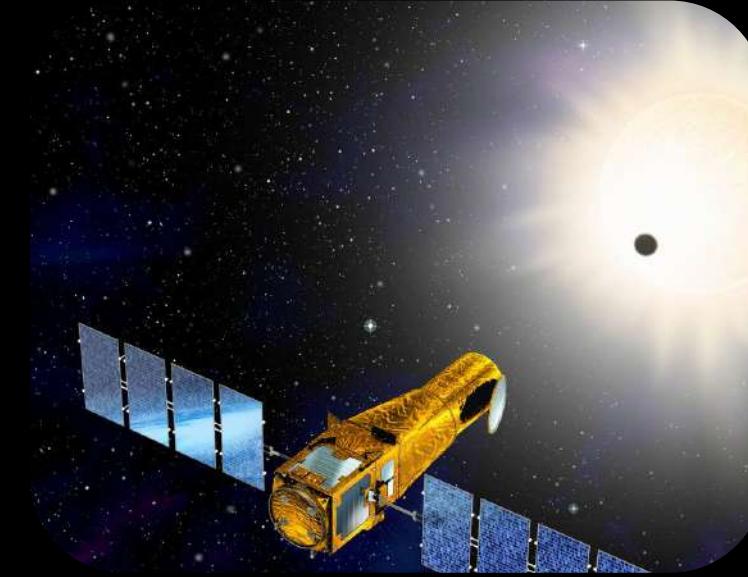
- Planet data:
- $M=0.7 M_{\text{Jup}}$
 - $R=1.35 R_{\text{Jup}}$
 - $i=86.6^\circ$
 - $\rho=0.35 \text{ g/cm}^3$ (!)



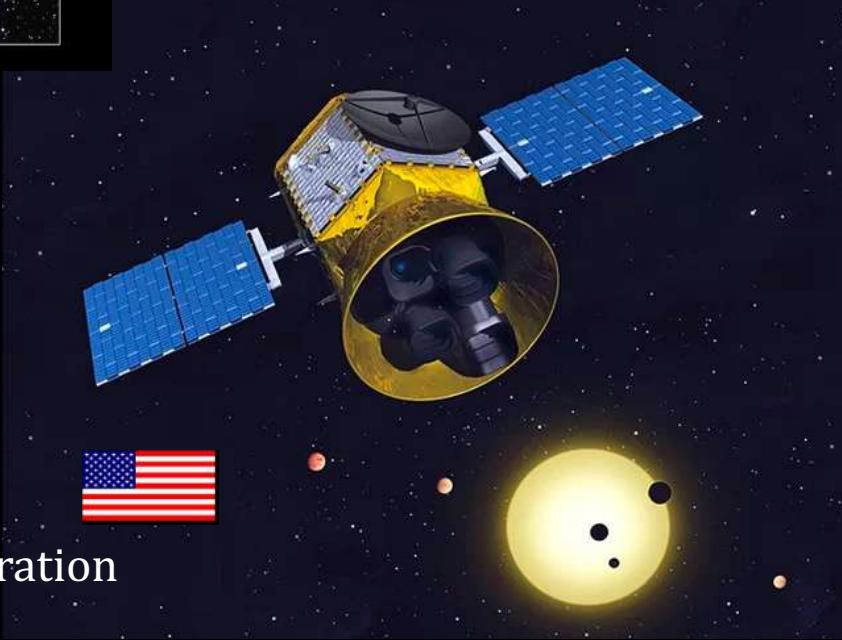
Transits from space



Kepler + K2 (NASA)
mission ended
(March 2009-May 2013;
June 2014-October 2018)



COROT (CNES/ESA)
mission ended
(December 2006-October 2012)



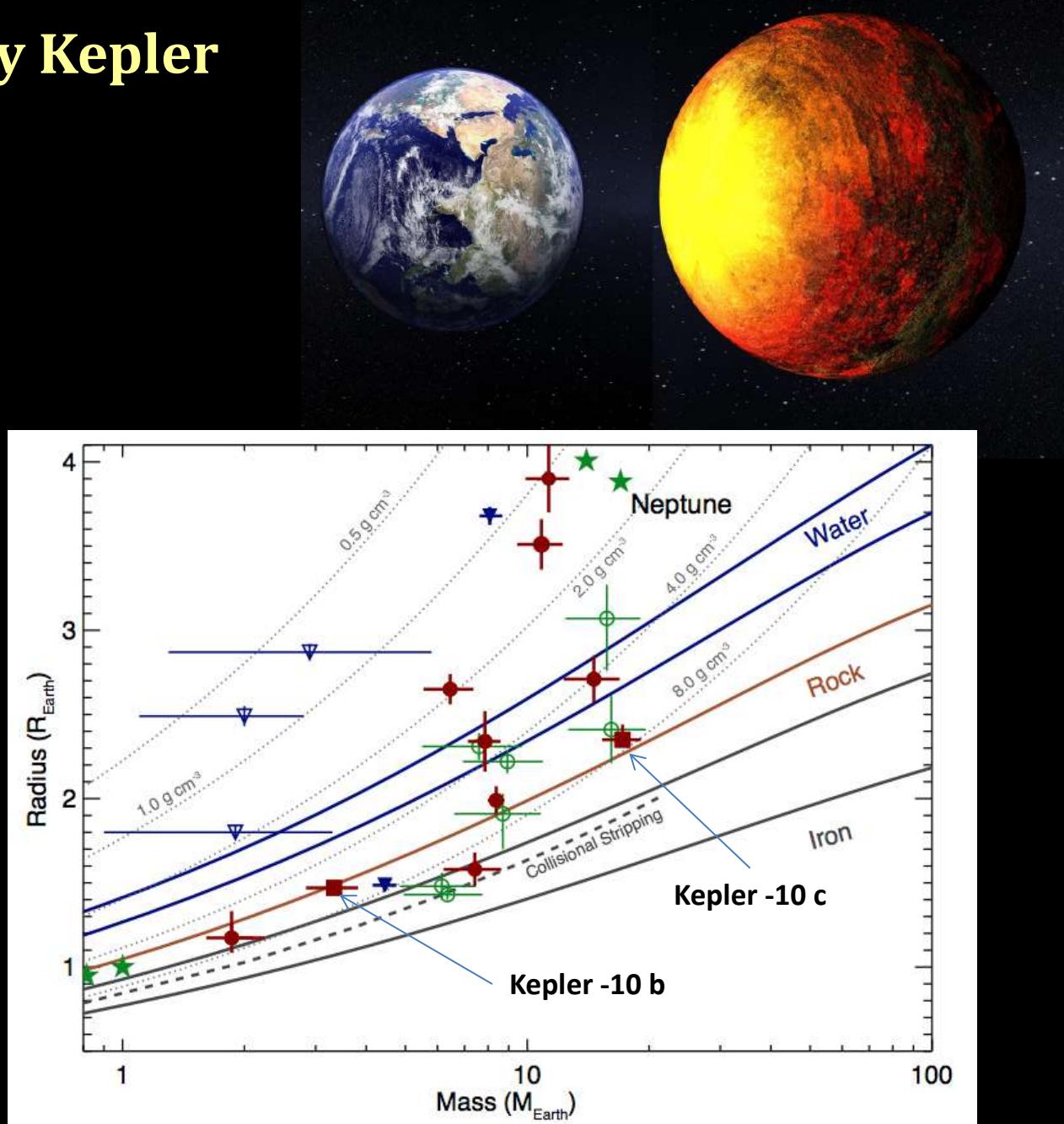
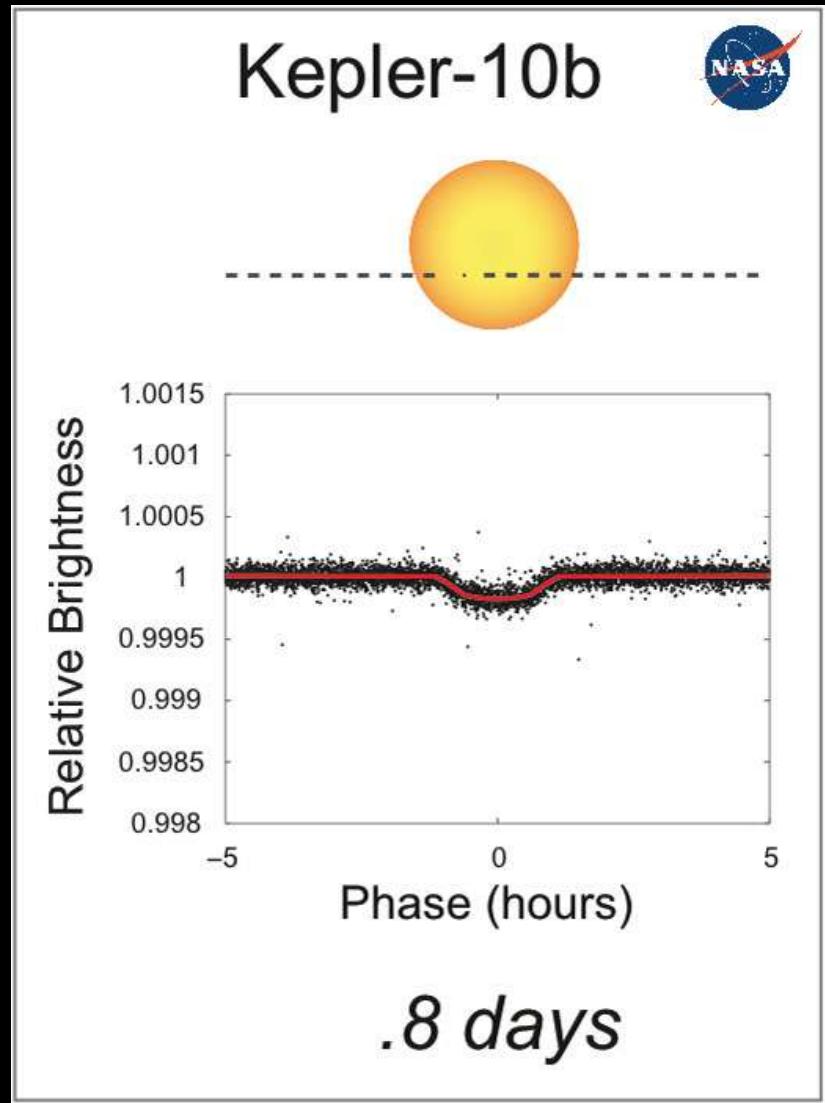
TESS (NASA)
mission in operation
(April 2018-)



CHEOPS (ESA)
Mission in operation
(December 2019-)

The first super-Earth discovered by Kepler

$M \sim 4.5 M_{\oplus}$ & $R = 1.4 R_{\oplus}$



The PLATO mission



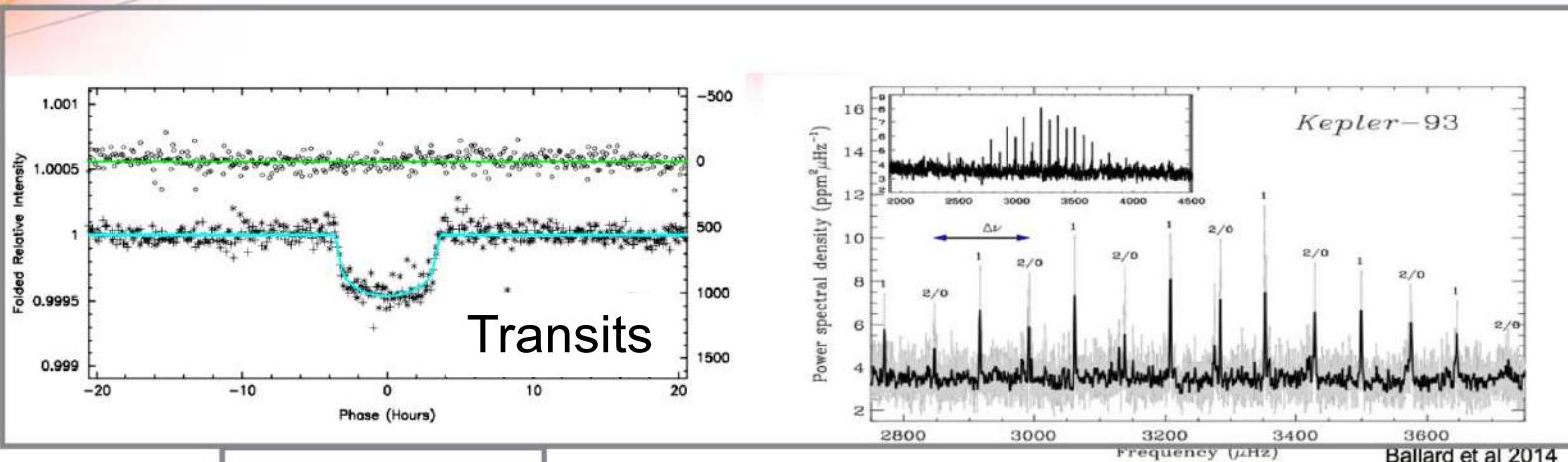
PLAnetary Transits and Oscillations of stars (PLATO) is a mission to detect and characterise exoplanets and study their host stars

Focus on Earth-size planets in orbits up to the habitable zone of bright Sun-like stars to address these main questions:

1. How do planets and planetary systems form and evolve?
2. Is our Solar system special or are there others like ours?
3. Are there potentially habitable planets?

- PLATO is ESA's M3 Mission
- Launch planned for end of 2026

The PLATO mission: methods

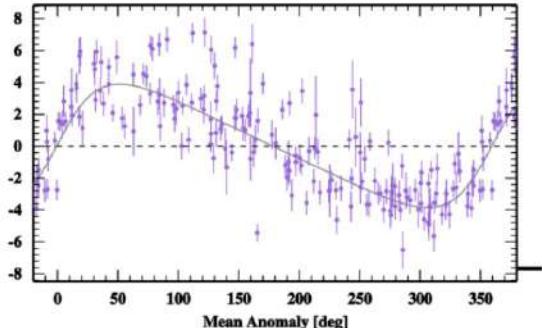


High-precision photometry

Planet radius
Period,
inclination

R_* , M_*
age

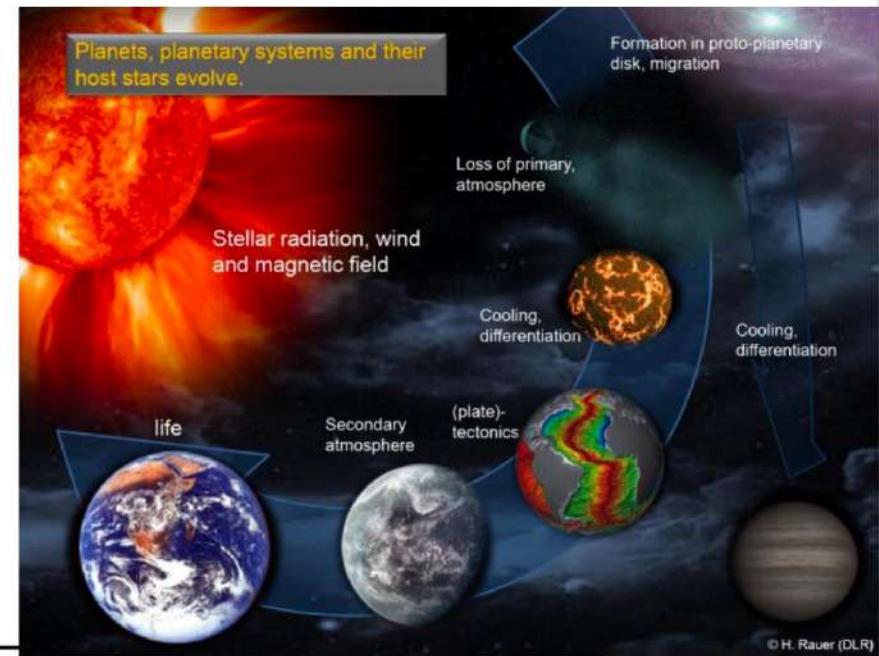
High precision
radial velocity



Planet mass
Eccentricity

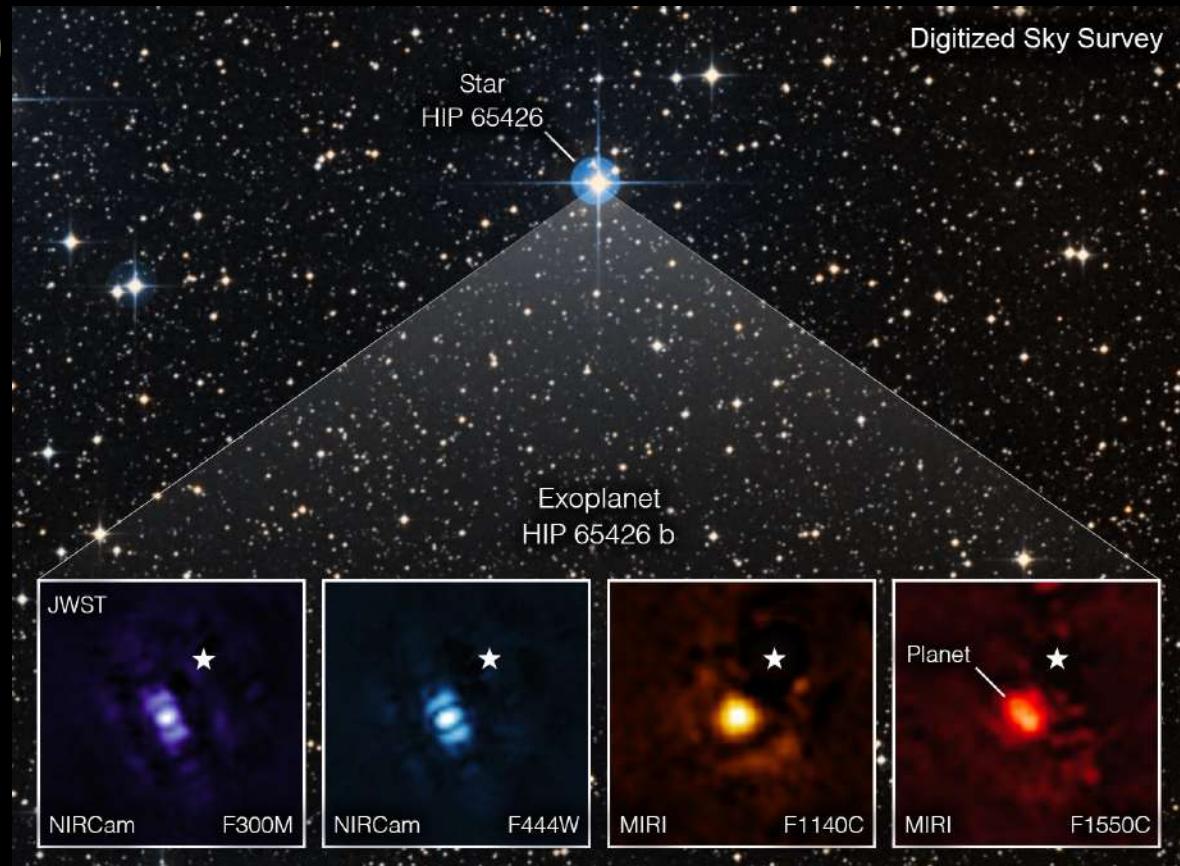
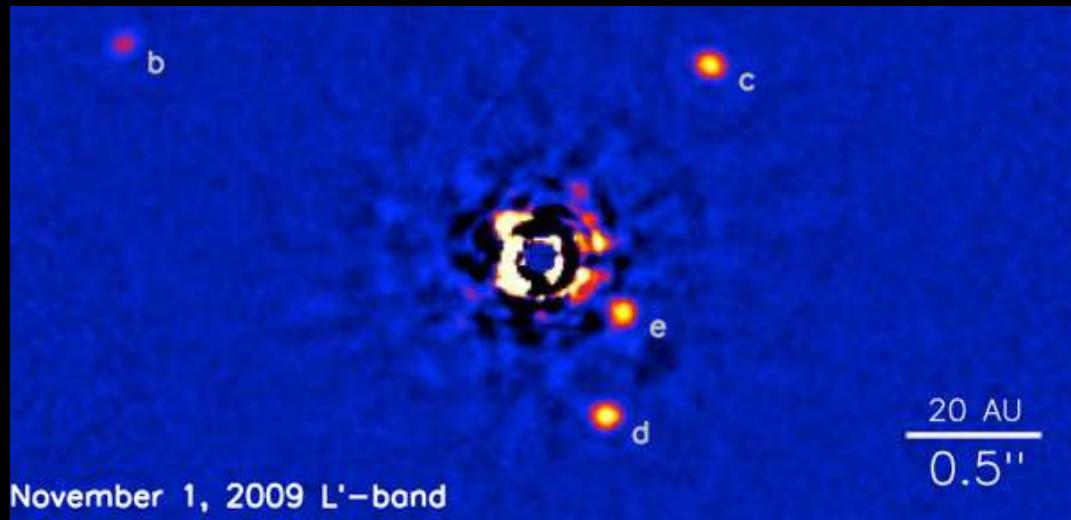
- Radius ~3%
- Mass ~10%
- Age ~ 10%

+ orbital parameters + architecture



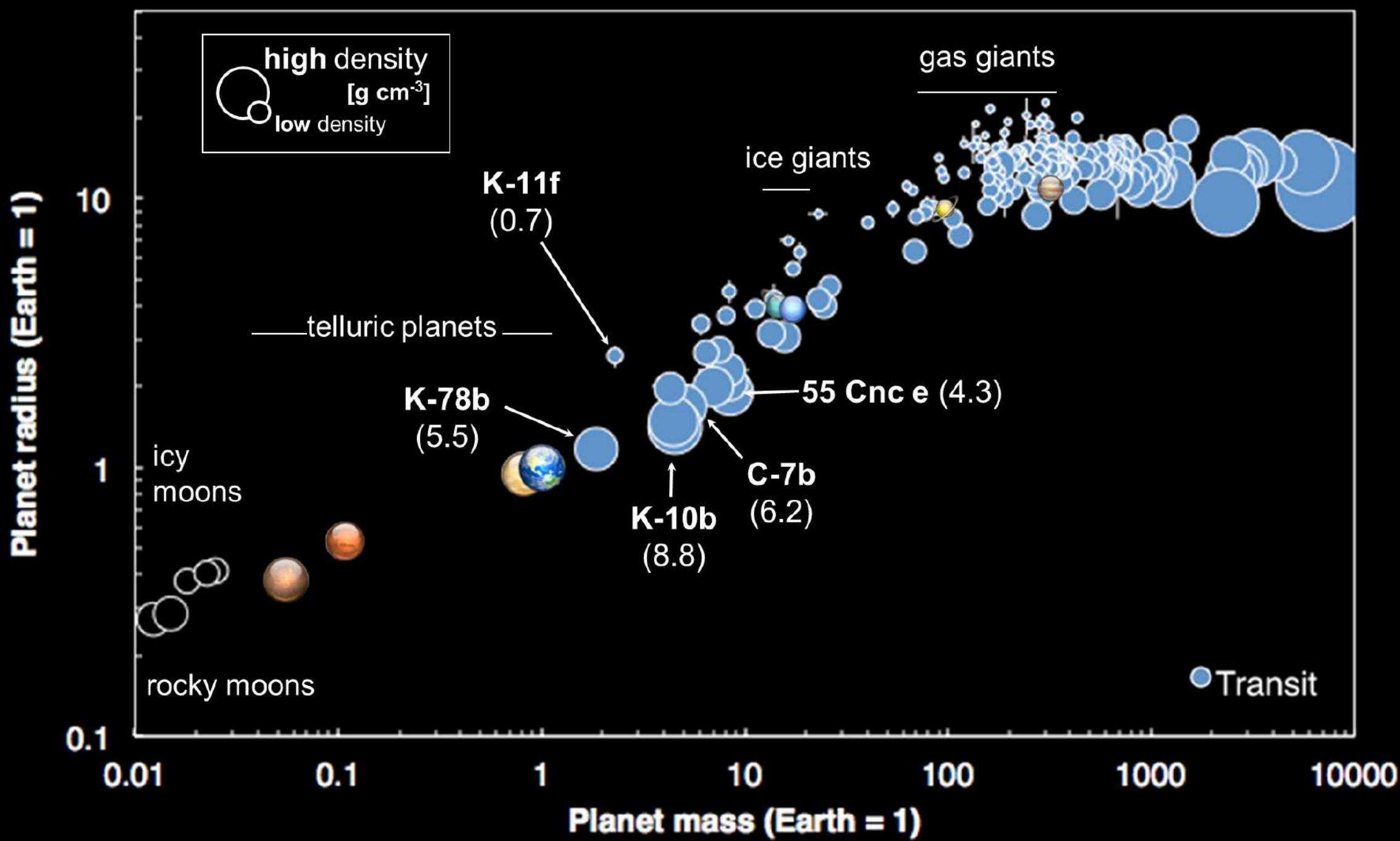
Direct imaging

- Severe contrast problem
 - In the visible (reflected light) contrast is 10^6 or more (for Jupiter)
 - In the IR (emitted light) the contrast is more favourable (10^4)
- Several successes! HR 8799, β Pic, Fomalhaut, HIP 65426, ...

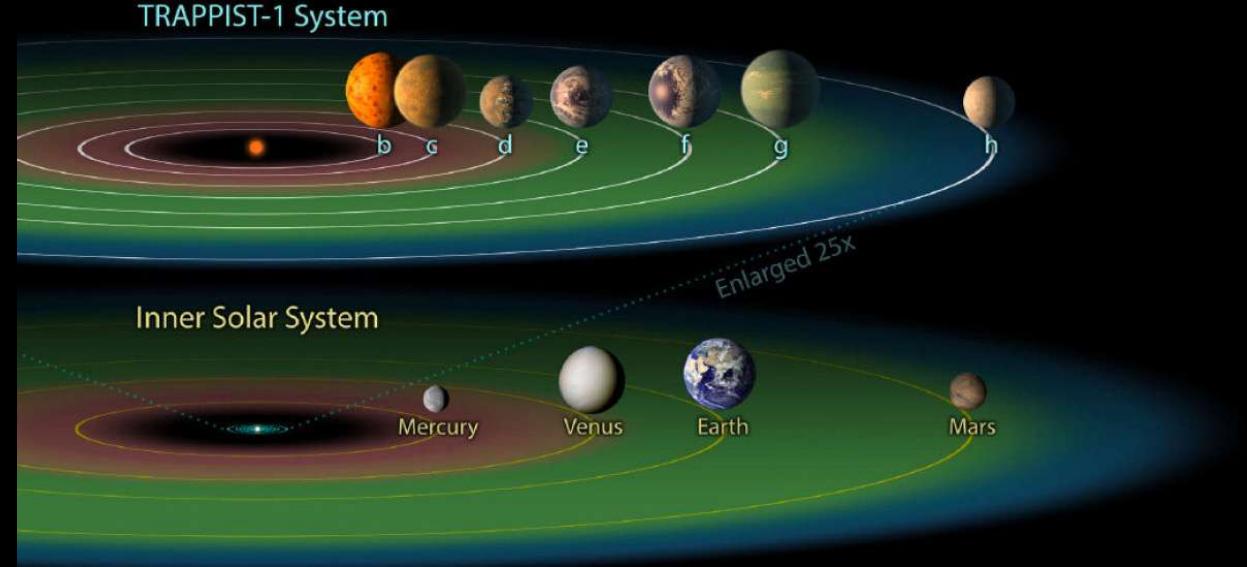
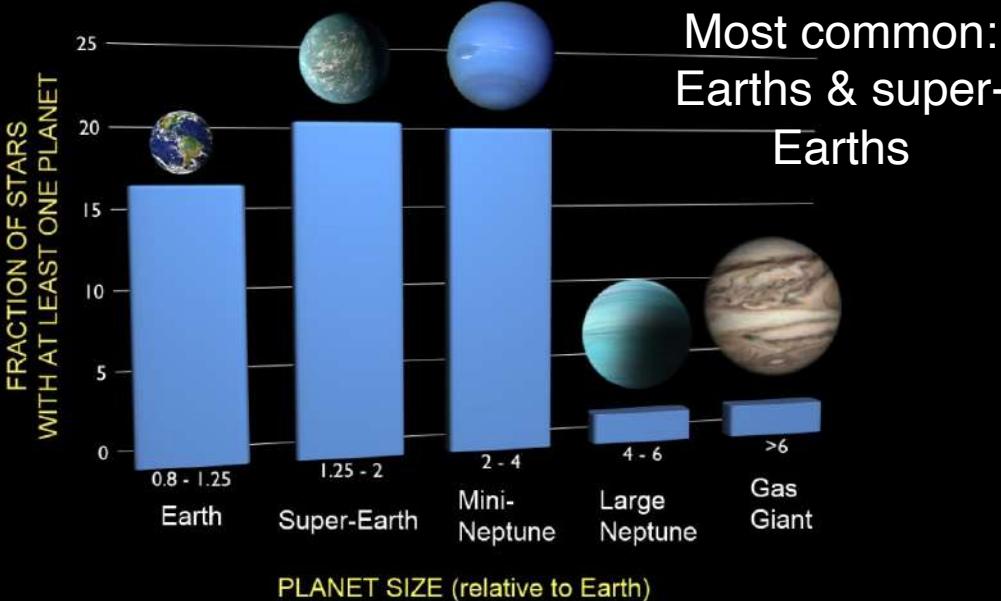
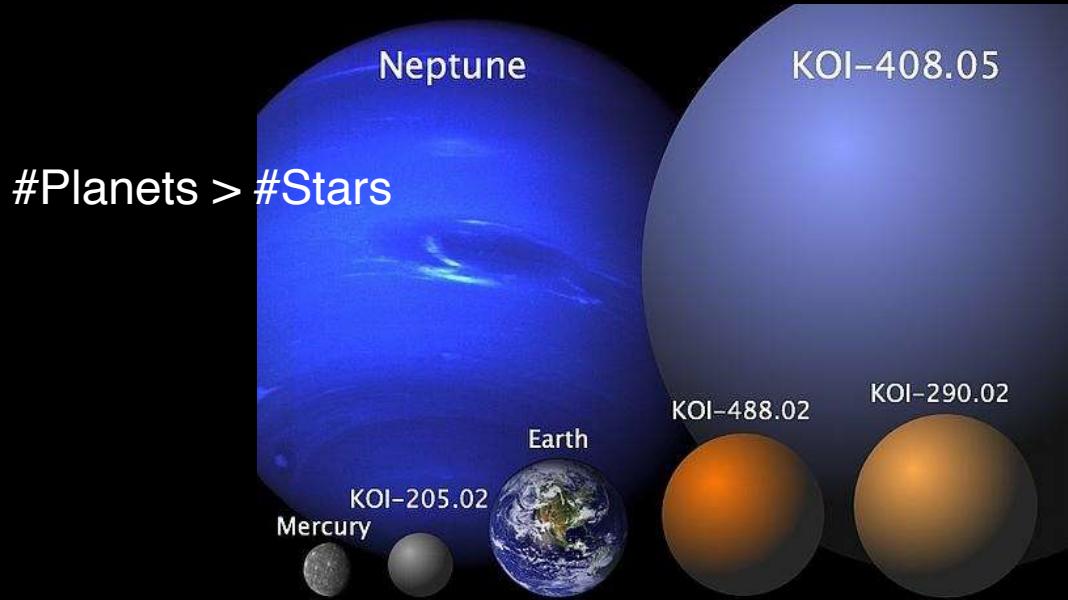


Statistics and results

Credit: Martin Vargic



What is known?



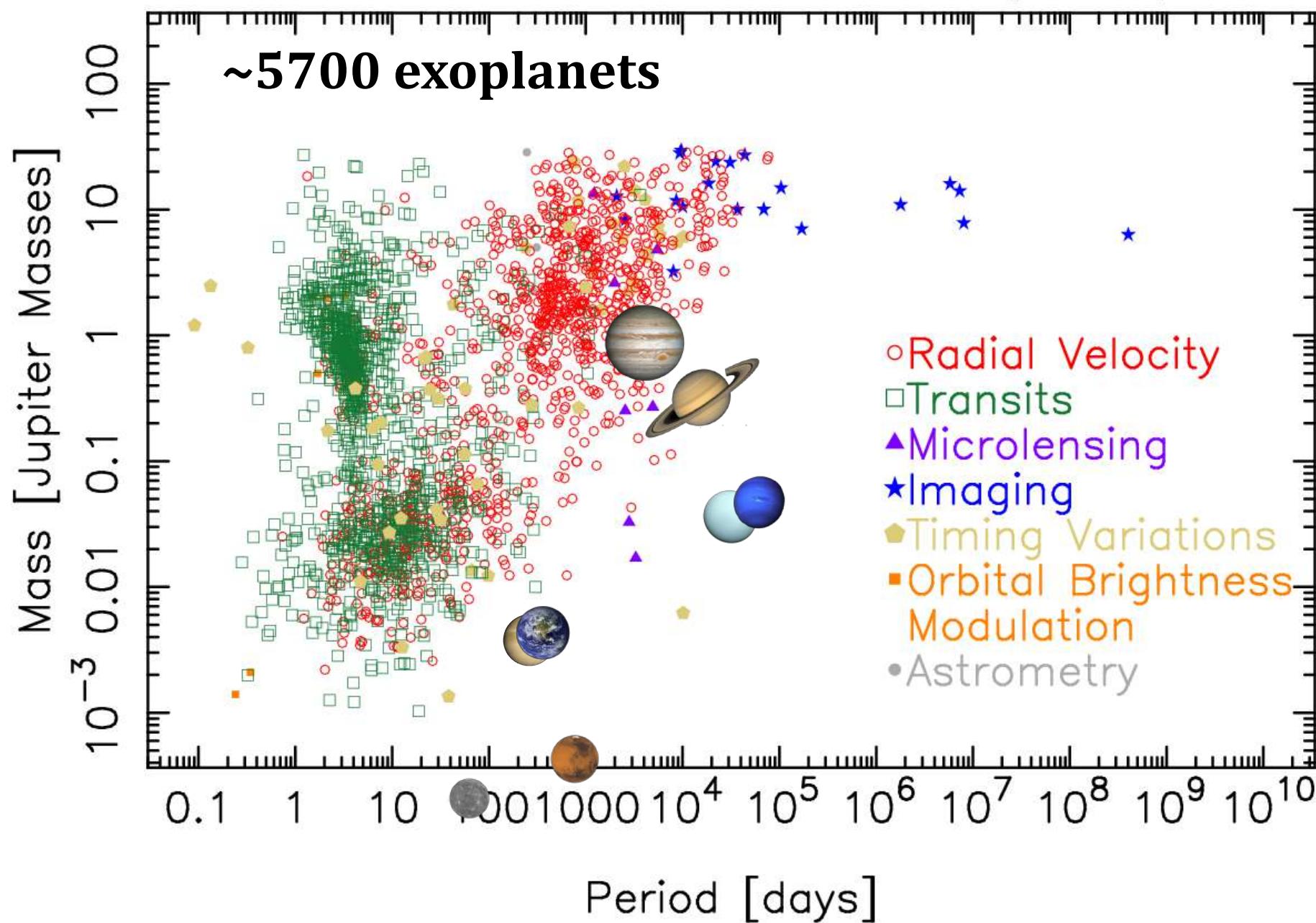
Multiple systems are common, especially around low-mass stars



Even the
closest star has
a planet in the
habitable zone

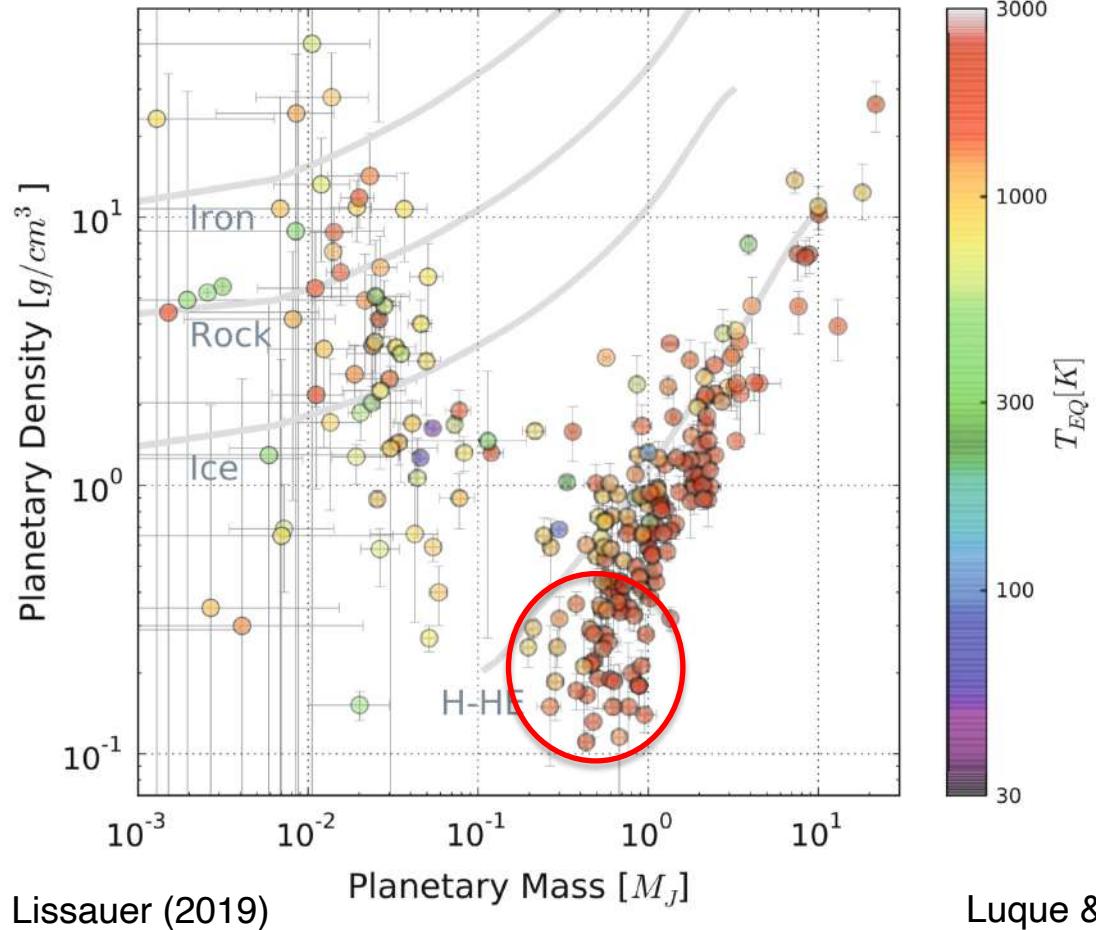
Mass – Period Distribution

02 May 2024
exoplanetarchive.ipac.caltech.edu



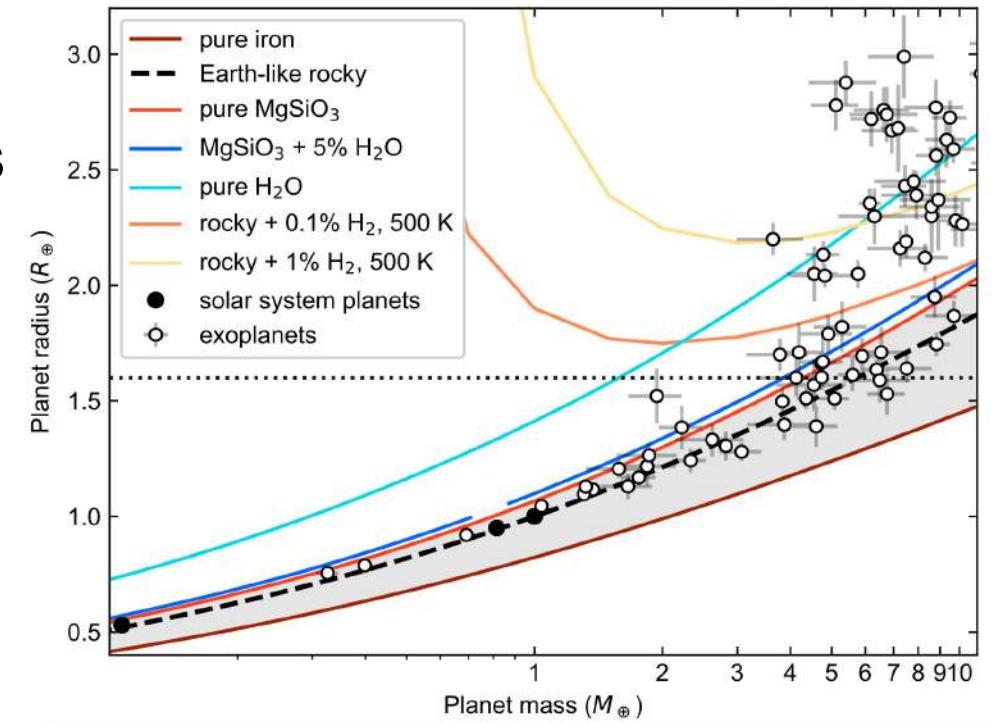
Mysteries

Many hot Jupiters have very low densities and are inflated, with radii $> 2 R_{\text{jup}}$

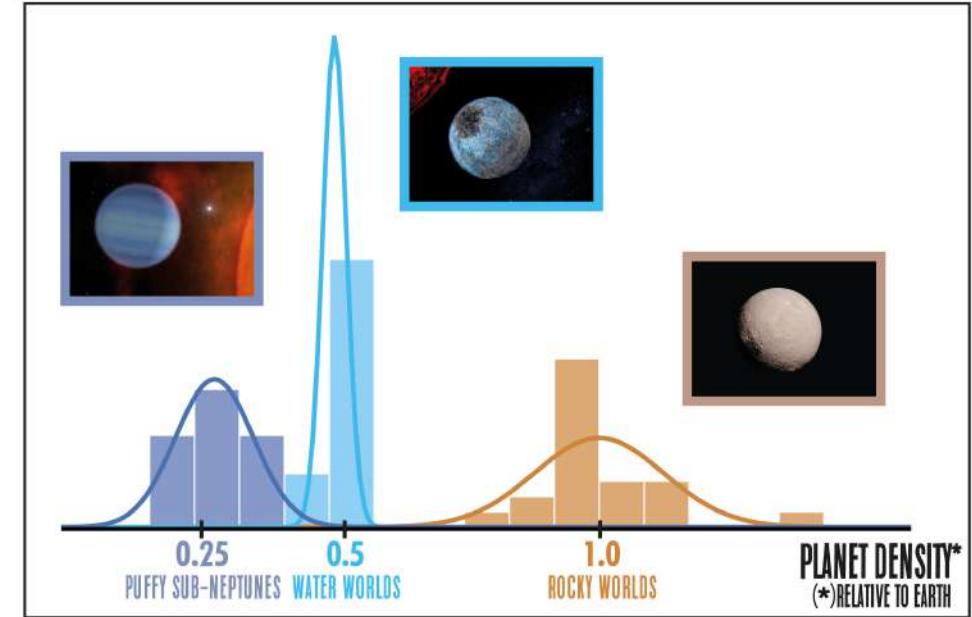


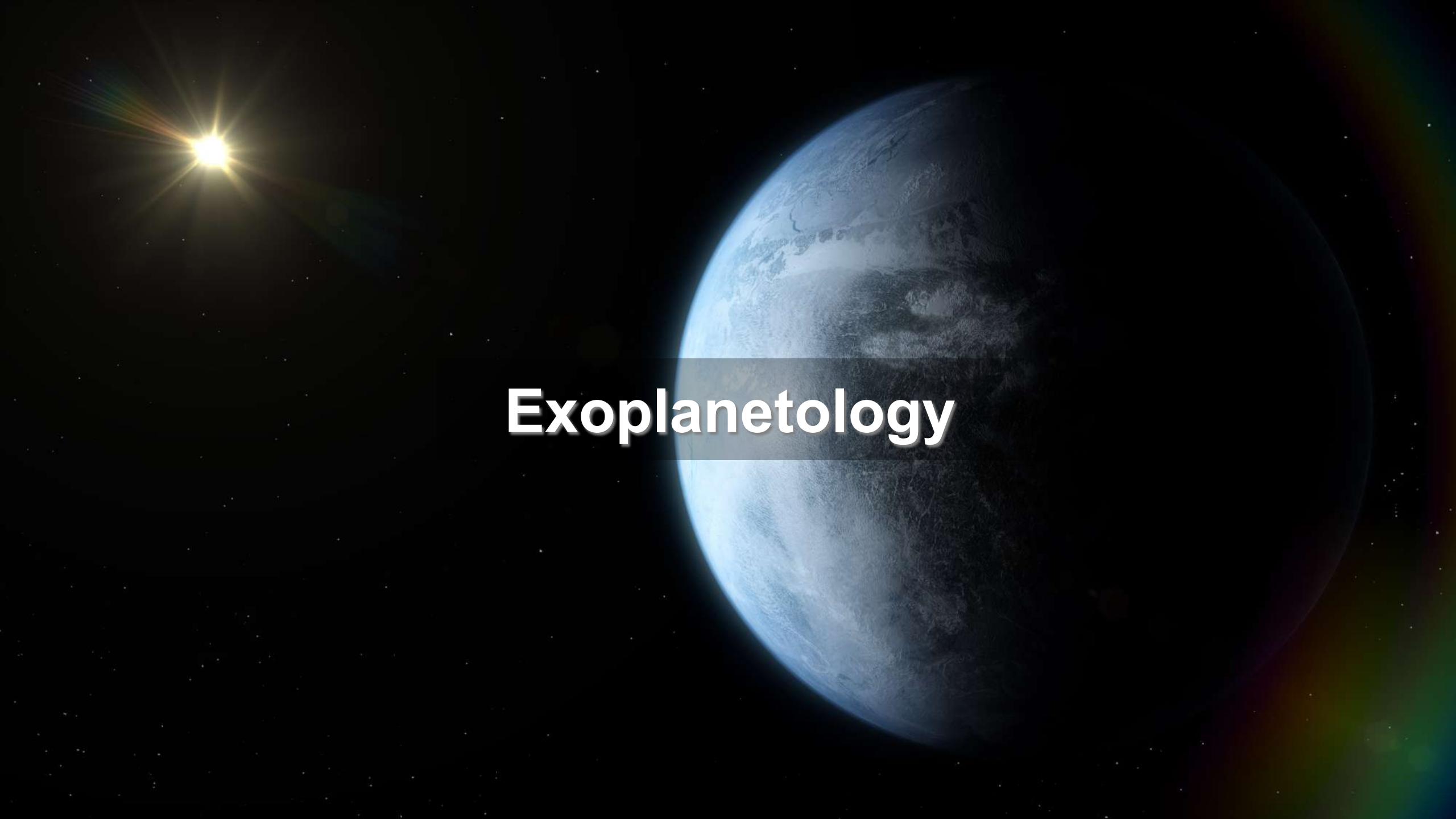
Lissauer (2019)

Where is the rocky/gaseous transition?



Luque & Pallé (2022)

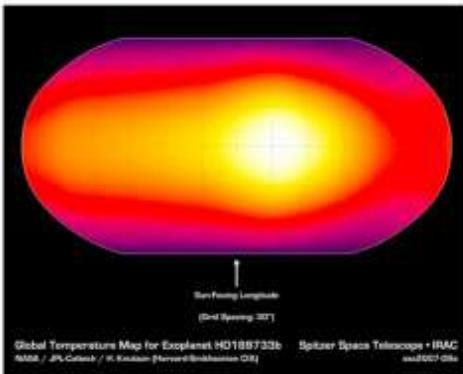
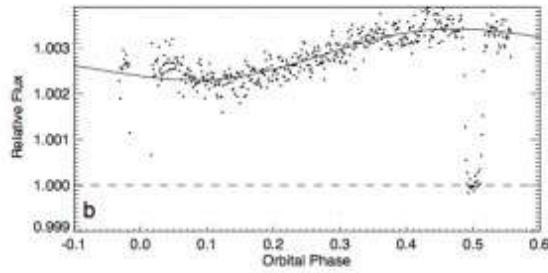




Exoplanetology

Studying the atmospheres of transiting planets

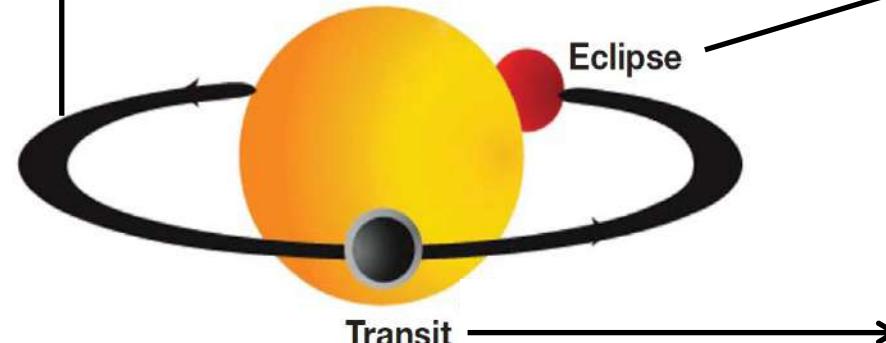
Phase curve



Knutson et al. (2008)

**Planet's spectrum
without the need for
ultra-high spatial
resolution**

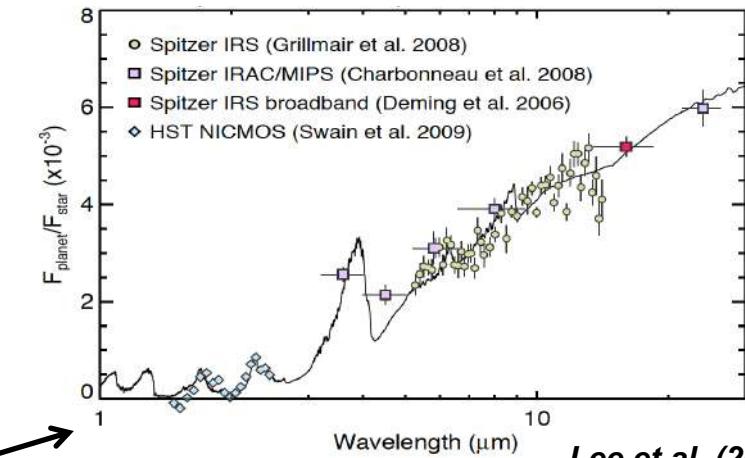
Bonus: mass, radius,
orbit, obliquity, etc...



Deming & Seager (2009)

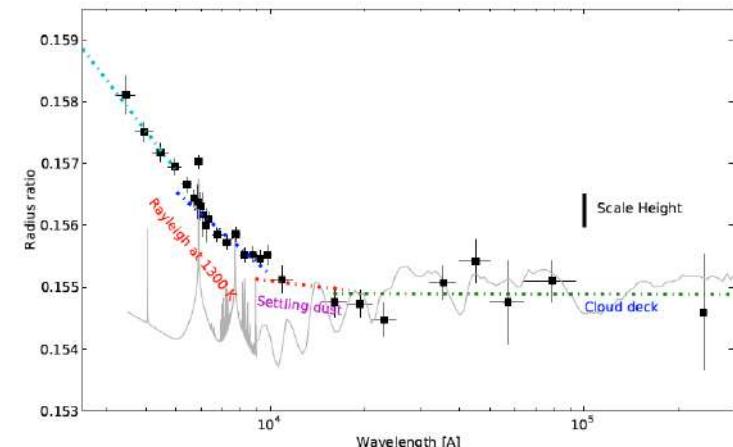
On-off method

Emission spectrophotometry (dayside)



Lee et al. (2011)

Transmission spectrophotometry (limb)



Pont et al. (2013)

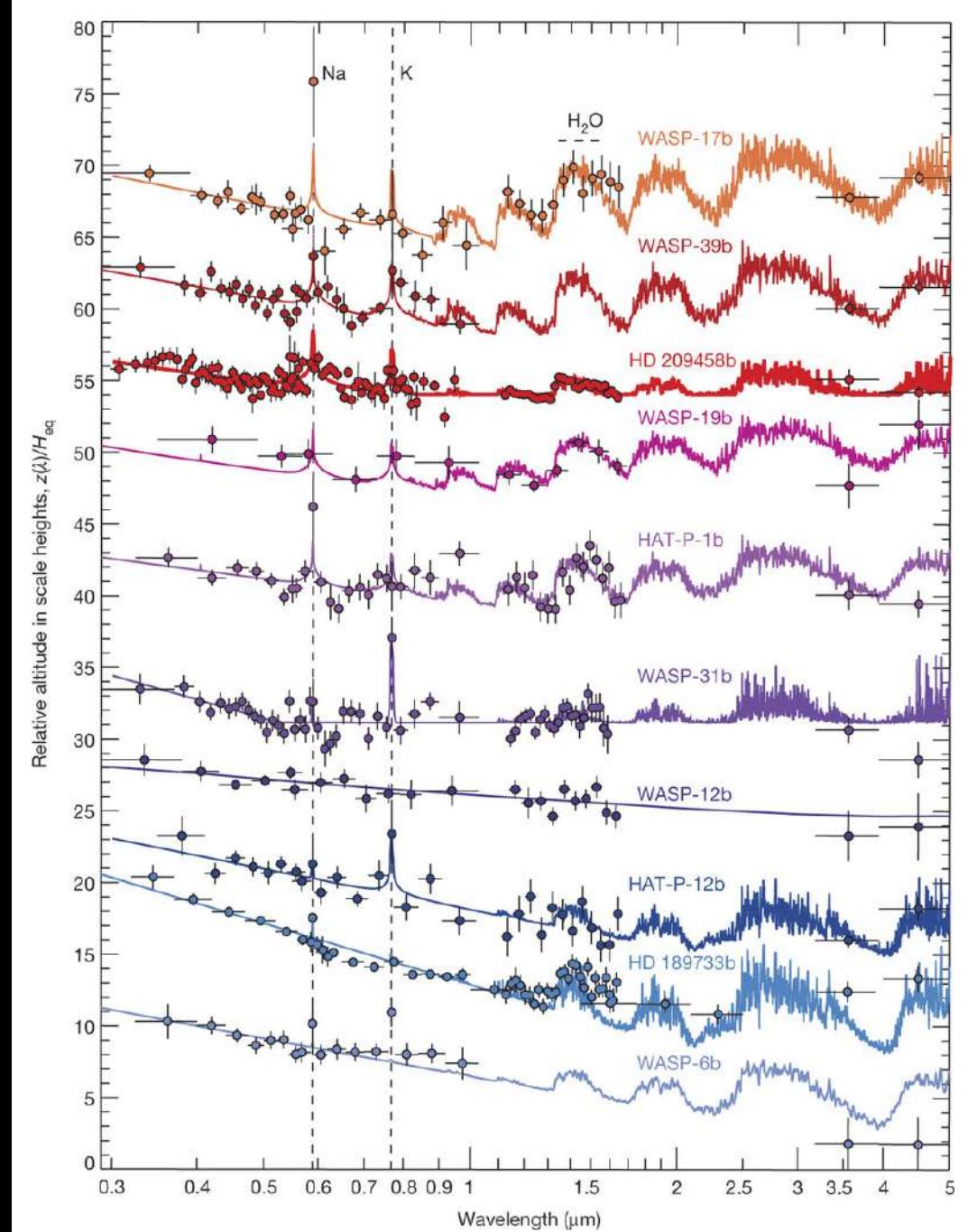
Transmission spectroscopy

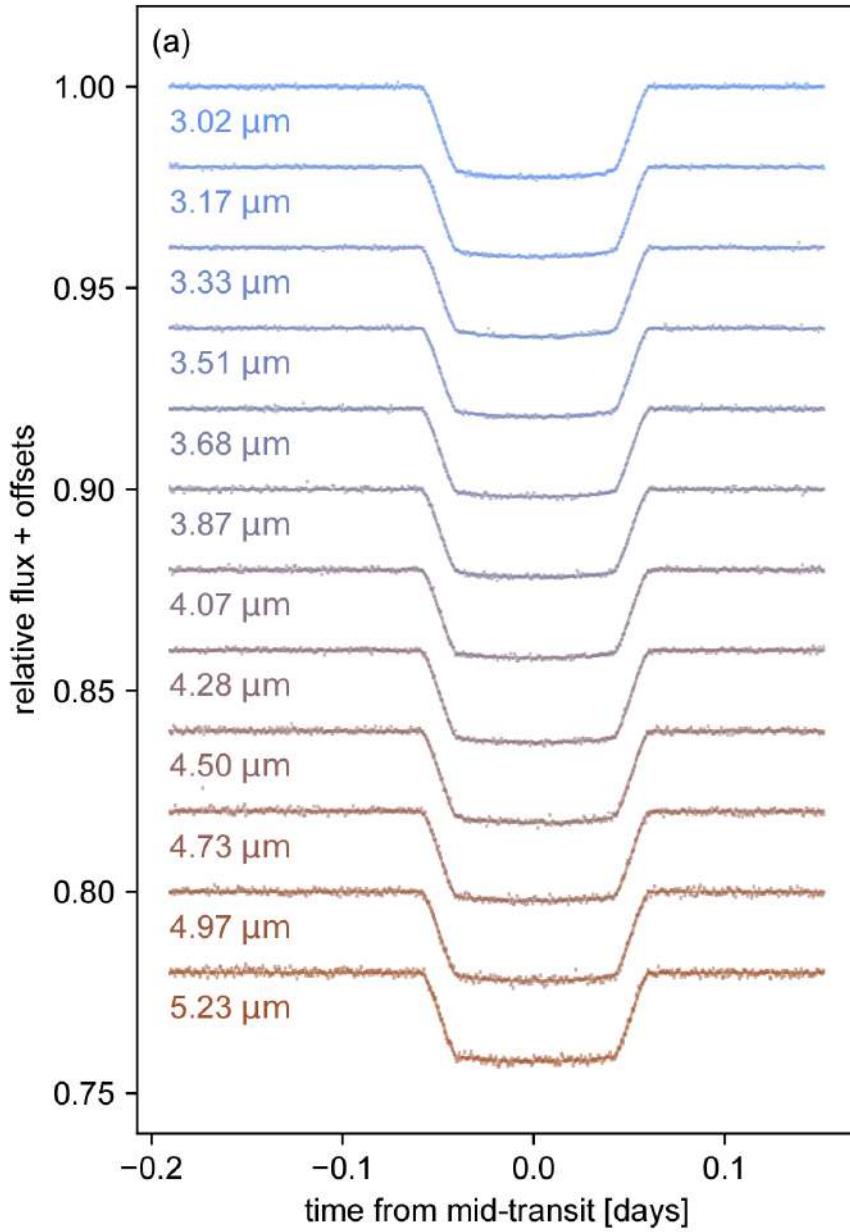


Artist's Impression of "Hot Jupiter" Exoplanets

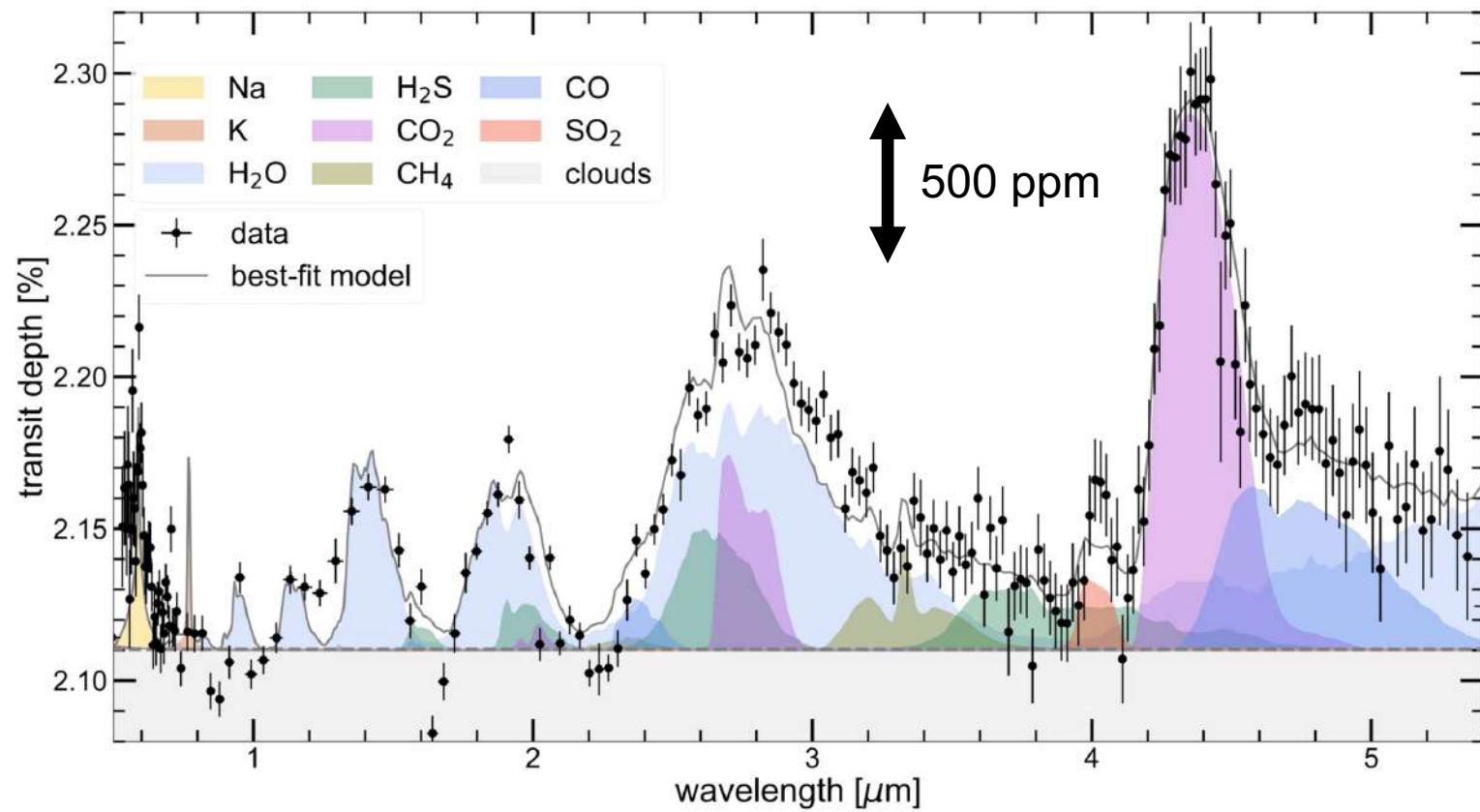
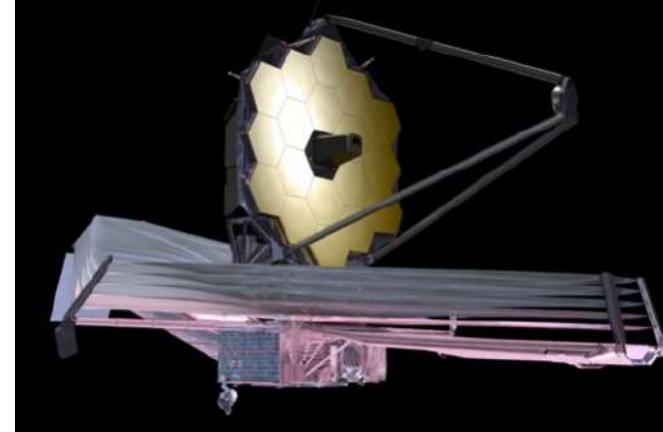
NASA and ESA • STScI-PRC15-44a

Sing et al. (2016)



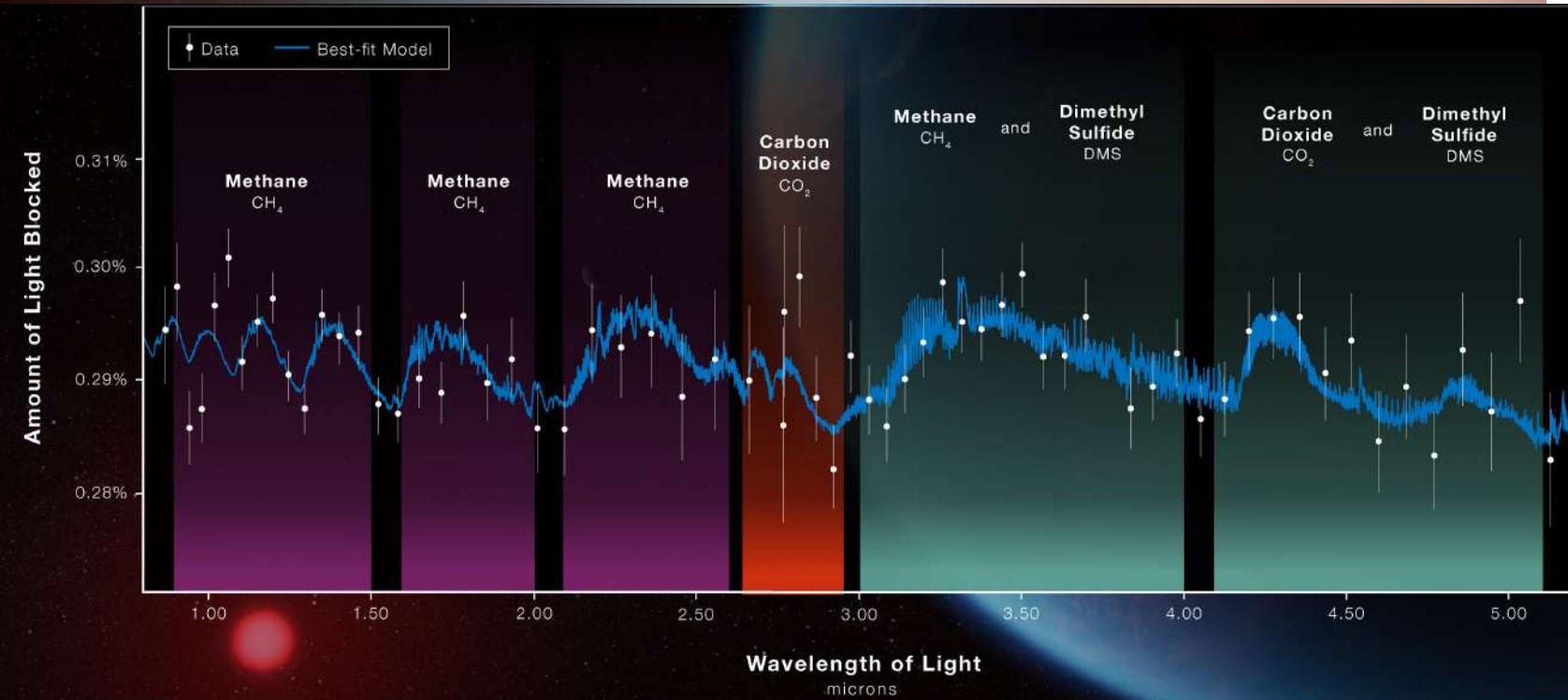
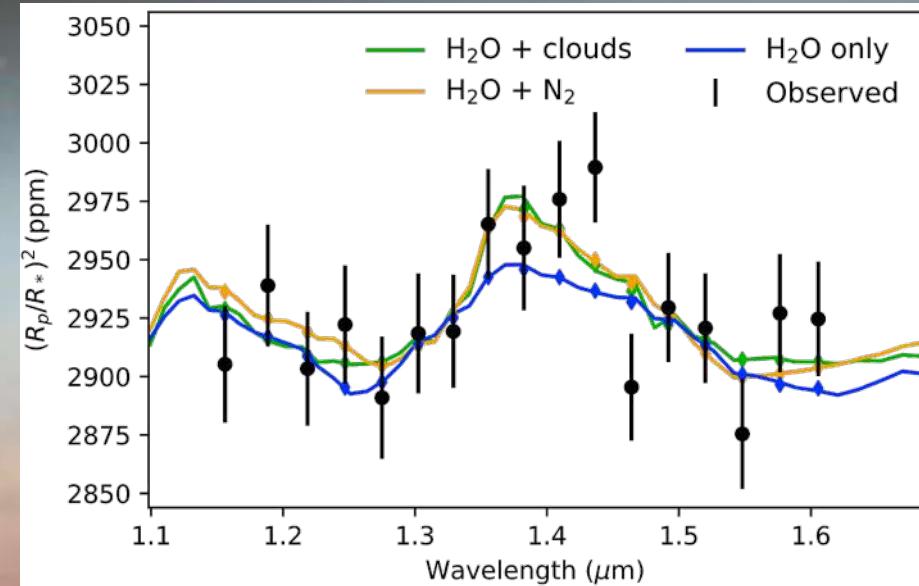


Transmission spectrum of WASP-39 b



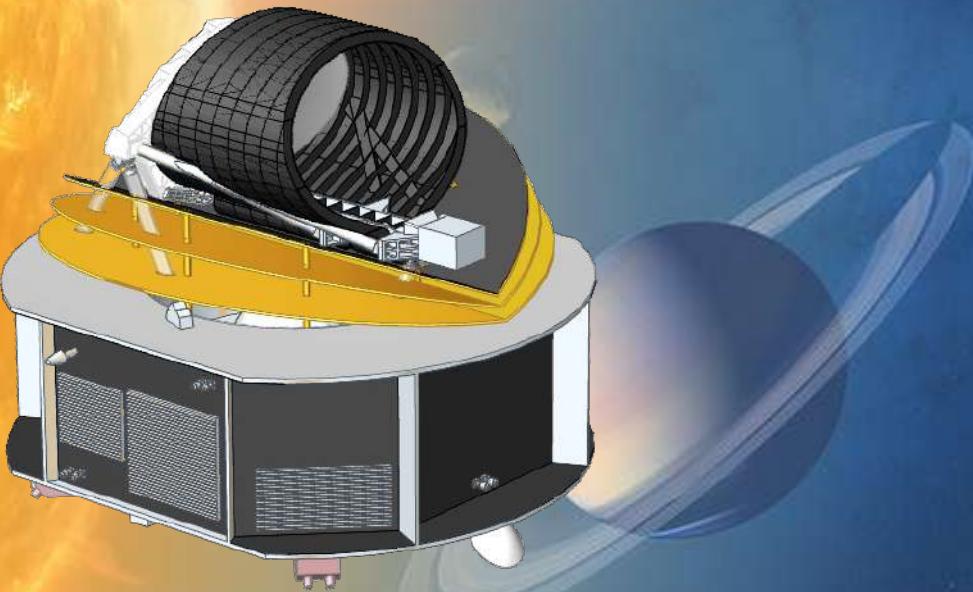
Transit transmission spectroscopy

K2-18 b
Near-IR: water vapor?



WEBB
SPACE TELESCOPE

The ARIEL mission

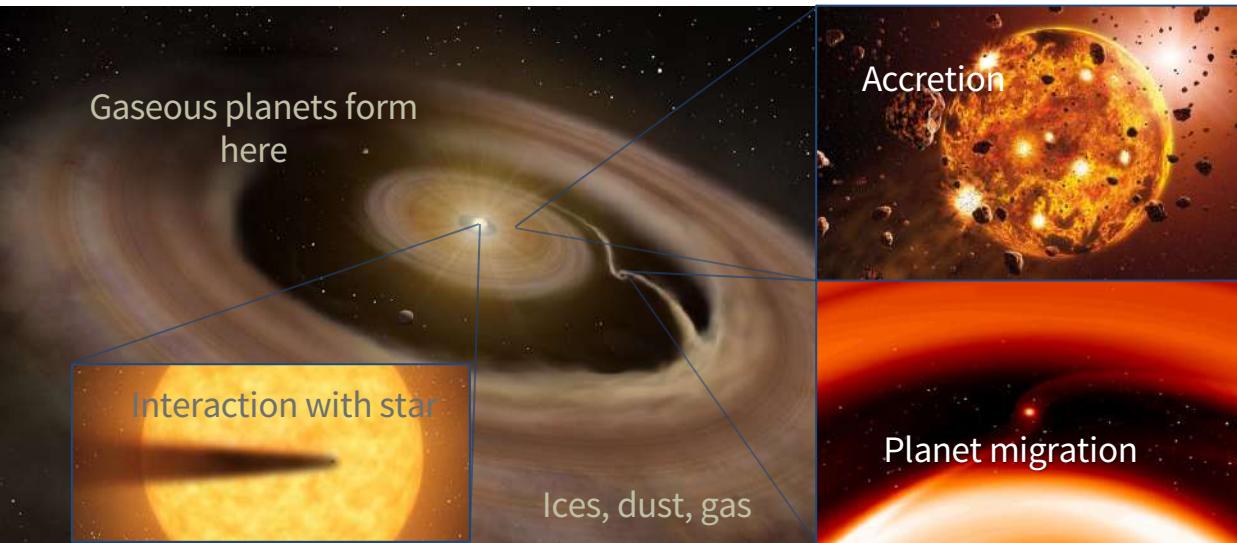
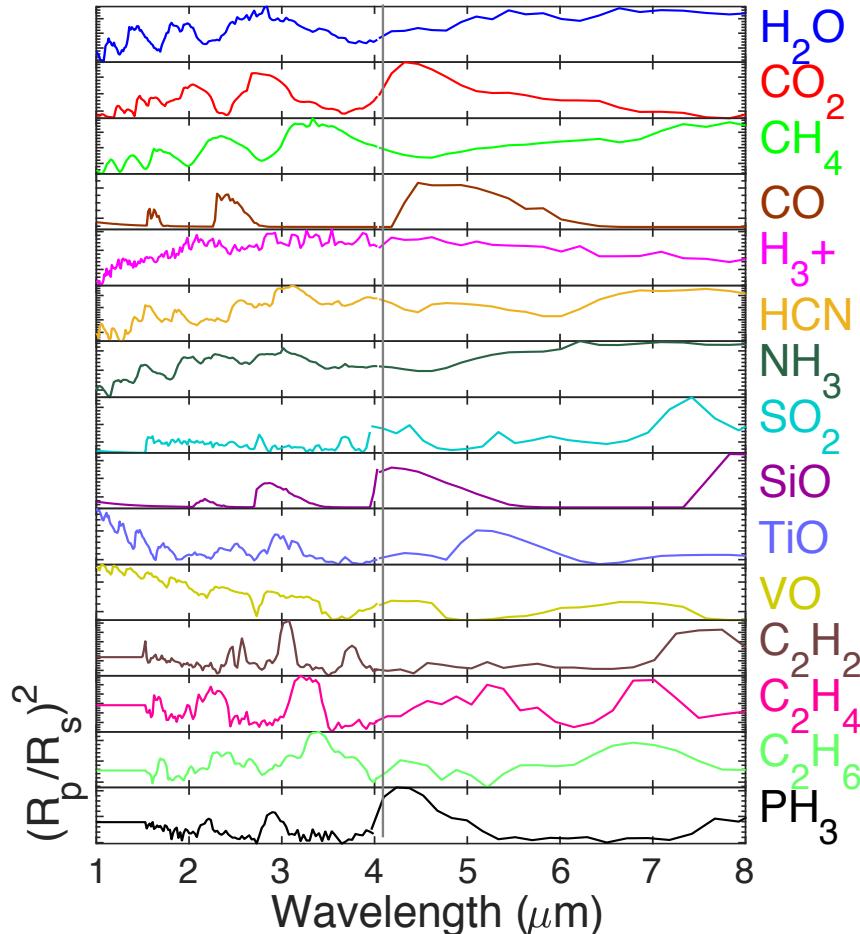


- ESA M4 mission
- Launch in late 2029
- 3.5 years @ L2
- ~1000 transiting exoplanets



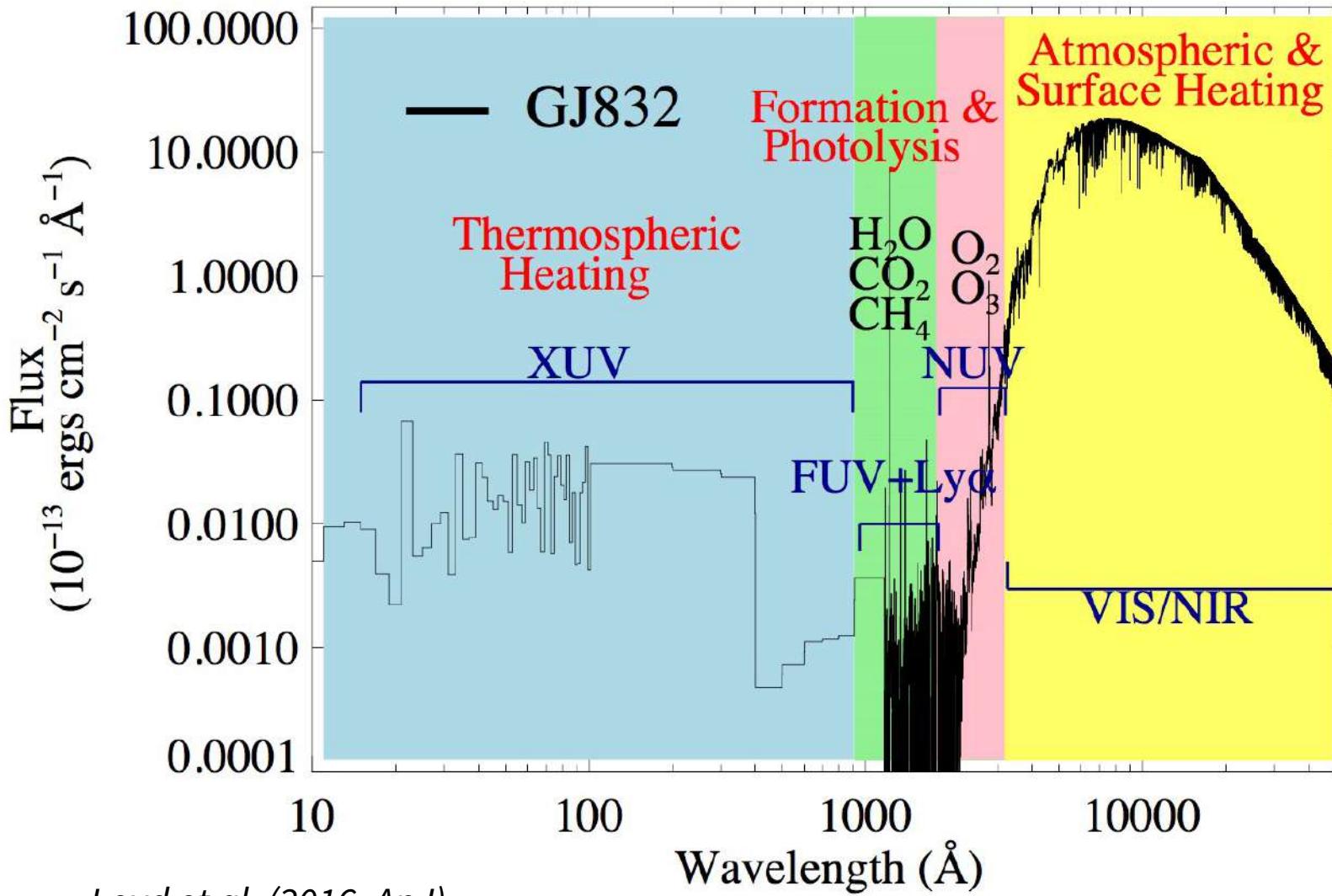
The ARIEL mission

- First chemical census of a large sample of diverse exoplanets

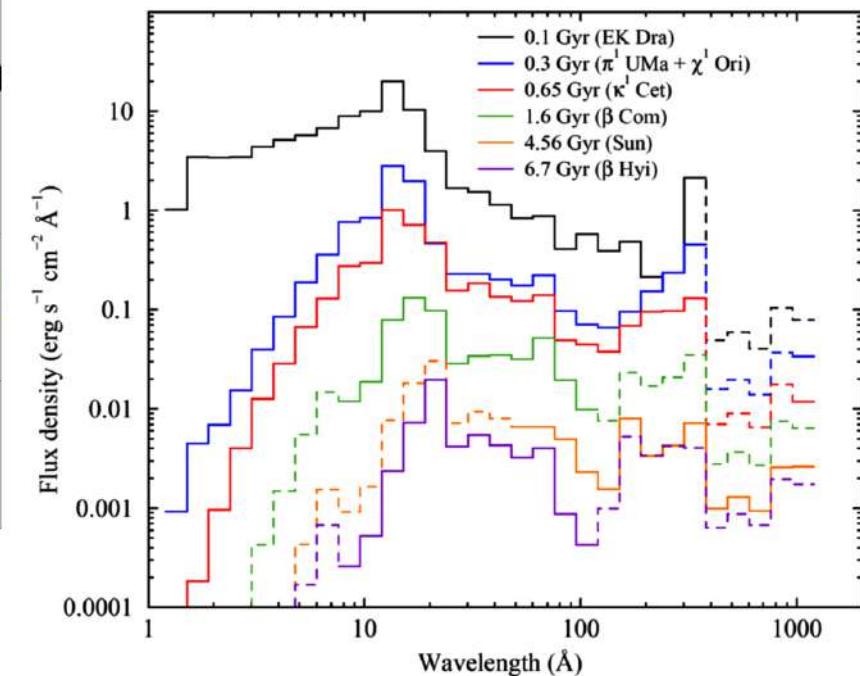
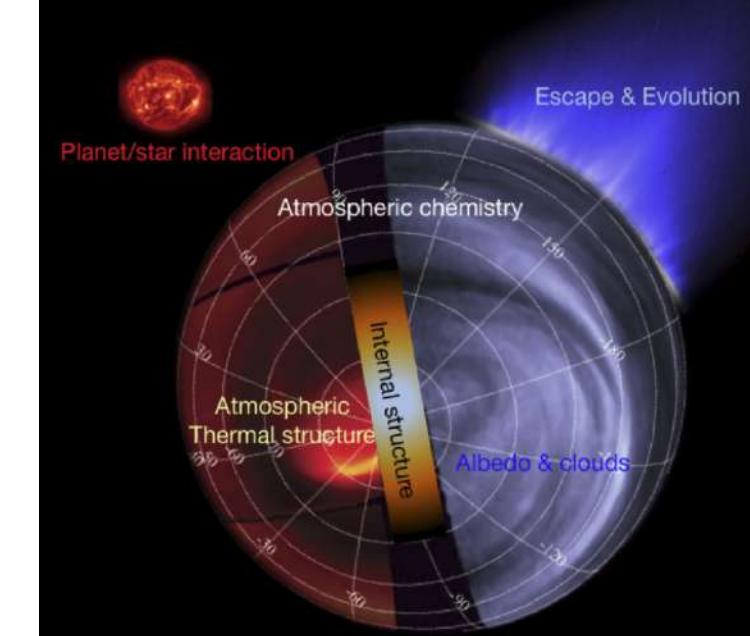


- Elliptical mirror telescope: $1.1 \times 0.7 \text{ m}^2$
- Cryogenic instrument with simultaneous coverage 0.5-7.8 mm
- Key questions
 - How diverse are exoplanets chemically?
 - Does chemical diversity correlate with other parameters?
 - Formation & evolution processes?
 - Migration? Interaction with star?

Stars have an impact on planet atmospheres



Loyd et al. (2016, ApJ)



Sun in time: Ribas et al. (2005, ApJ)

- Are there other planets out there?
- How did they form and evolve?
- What are they made of?
- Are they habitable?
- Are they inhabited?

4 centuries after the Copernican revolution, this is a new revolution: Our context in the living Universe

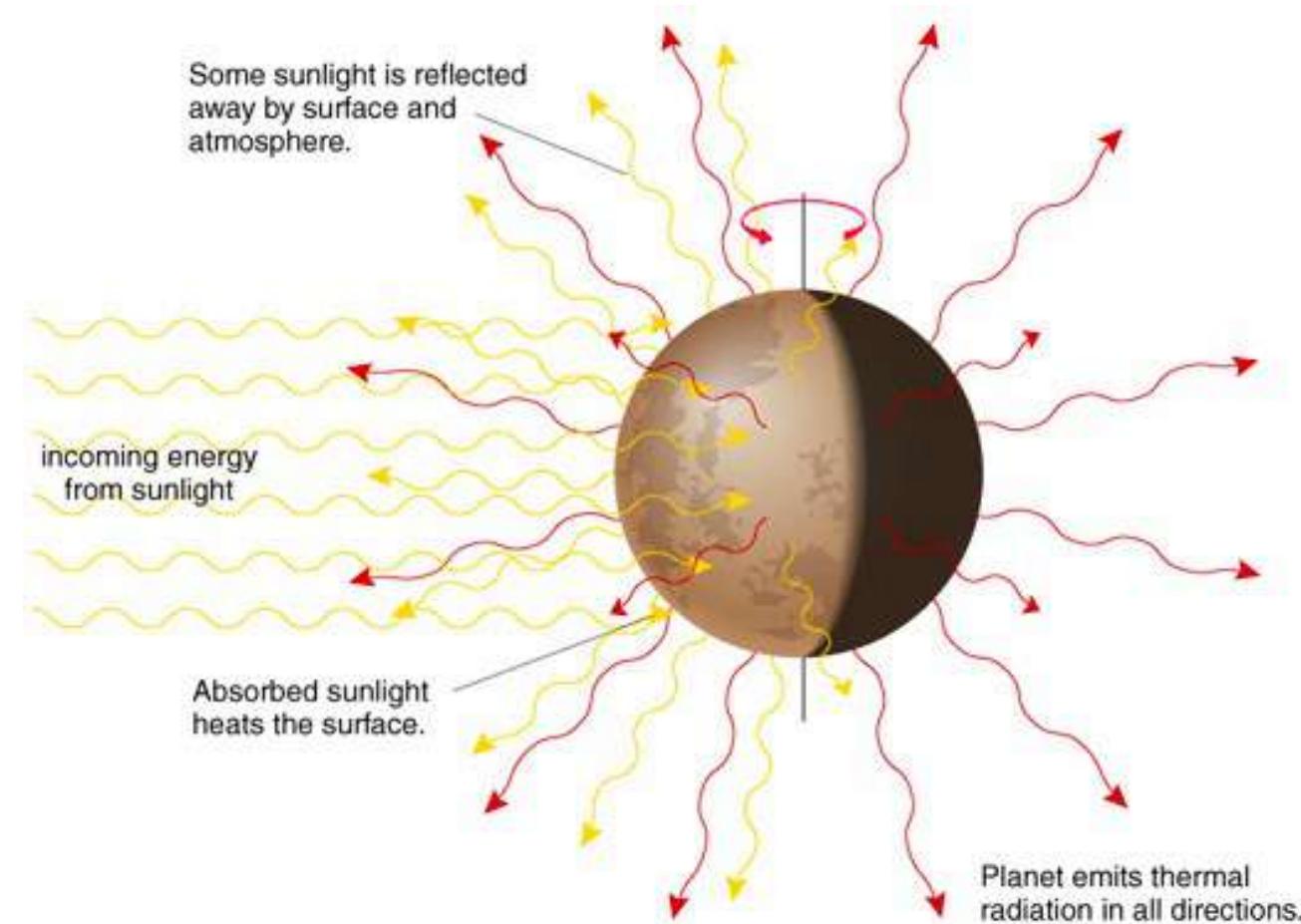


Habitability

The stellar habitable zone

Requirement: liquid water on its surface → surface temperature between 0 and 100 °C (273 – 373 K)

It depends on the stellar irradiation balance between absorbed and emitted energy.



First approximation

- Absorbed energy: $E_{abs} = \pi R_p^2 (1 - A) \cdot S$

S : solar (or stellar) irradiance

$S_\odot = 1360 \text{ W m}^{-2}$ (solar constant, at 1 au)

$$S = \frac{L}{4\pi a^2}$$

A: Bond albedo, reflected energy $A_{\text{Earth}} \sim 0.3$

- Emitted energy: $E_{em} = f \pi R_p^2 \sigma T_{eq}^4$
black body radiation

$$E_{abs} = E_{em} \quad \pi R_p^2 (1 - A) \cdot S = f \pi R_p^2 \sigma T_{eq}^4$$

f: redistribution factor

- $f=4$ if energy is uniformly redistributed on the planetary sphere (\sim Earth)
- $f=2$ if the energy is distributed over the starlit hemisphere
- $f=1/\cos \theta$ if there is no redistribution (no atmosphere)

$$T_{eq} = \left(\frac{(1 - A)L}{4\pi a^2 f \sigma} \right)^{1/4} \quad a = \left(\frac{(1 - A)L}{4\pi f \sigma T_{eff}^4} \right)^{1/2}$$

The stellar habitable zone

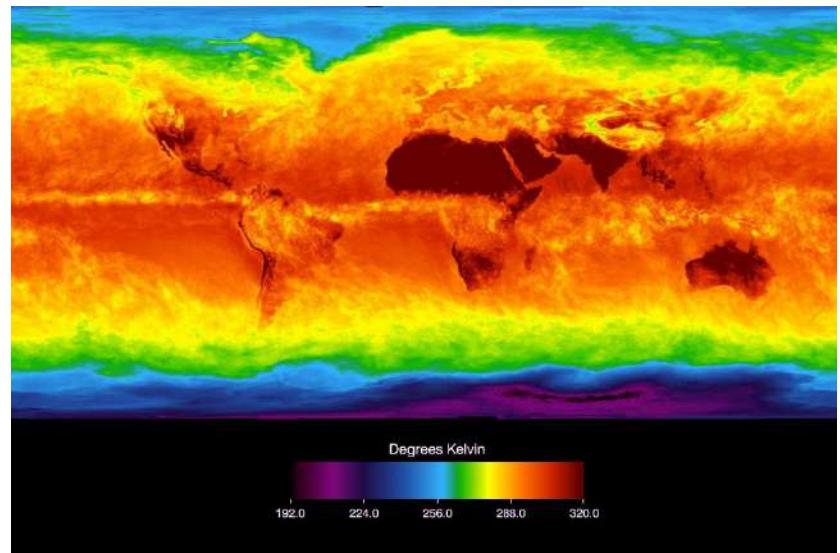
Solar System HZ

Assume $A \sim 0.3$:

HZ inner limit: $T_{eq} = 100^\circ C = 373 K \rightarrow a_{in} = 0.47 au$

HZ outer limit: $T_{eq} = 0^\circ C = 273 K \rightarrow a_{out} = 0.87 au!$

Only Venus is inside this region...



Caution! The equilibrium temperature corresponds to a black body with the same emission, but with dense atmospheres, it does not indicate a physical temperature at the surface or the atmosphere

Planet equilibrium temperatures

Venus ($a = 0.72 au, A \sim 0.75$): $T_{eq} = -42^\circ C$

Earth ($a = 1.0 au, A \sim 0.29$): $T_{eq} = -18^\circ C$

Mars ($a = 1.5 au, A \sim 0.22$): $T_{eq} = -60^\circ C$

But we know that surface temperatures are:

Venus $\sim 464^\circ C (+506^\circ C)$

Earth $\sim 15^\circ C (+33^\circ C)$

Mars $\sim -55^\circ C (+5^\circ C)$

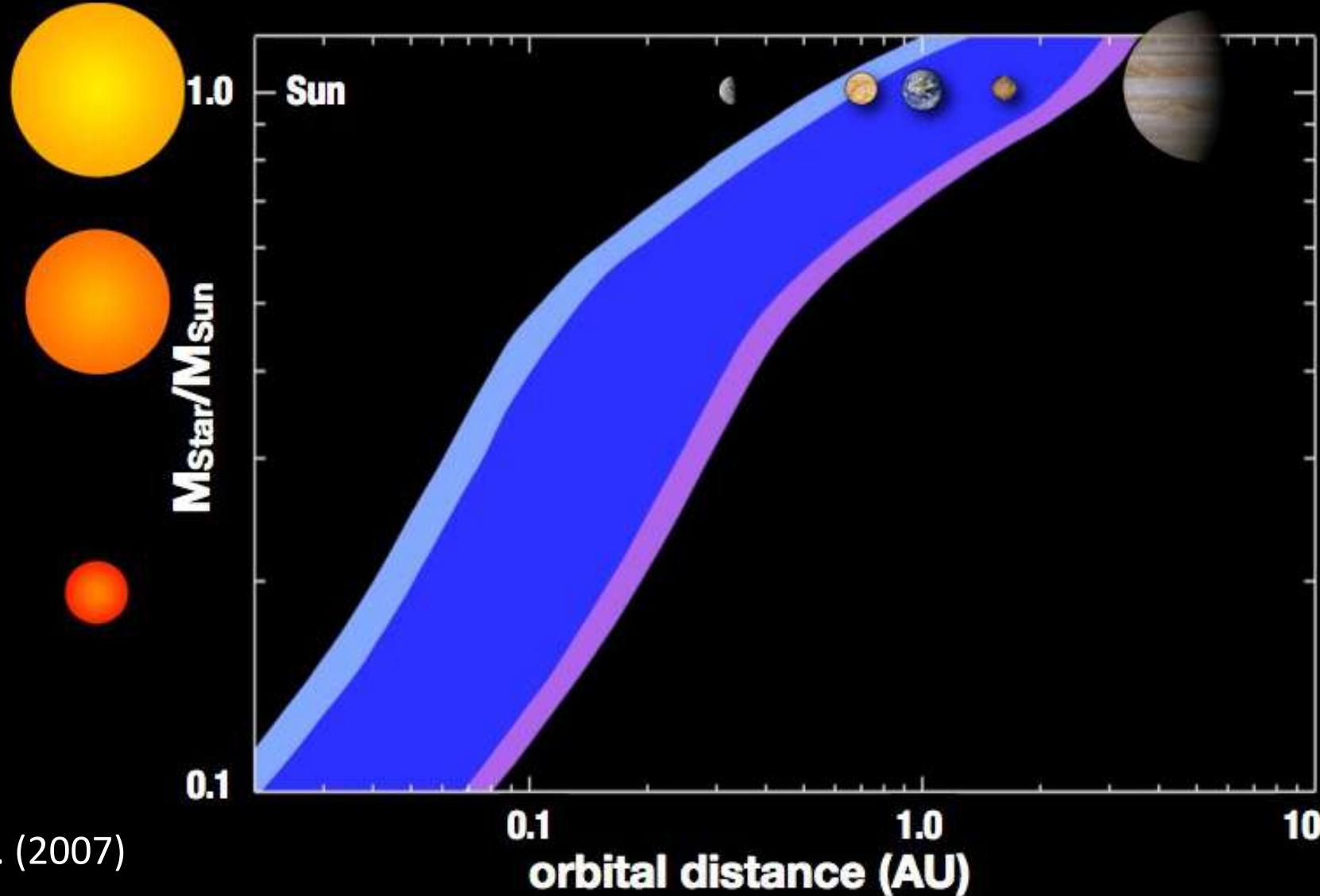
$$T_s = T_{eq} + \Delta T_{GH}$$

Earth case, $A \sim 0.3, \Delta T_{GH} = 33^\circ C$

HZ inner limit: $T_s = 100^\circ C = 373 K \rightarrow a_{in} = 0.56 au$

HZ outer limit: $T_s = 0^\circ C = 273 K \rightarrow a_{out} = 1.12 au$

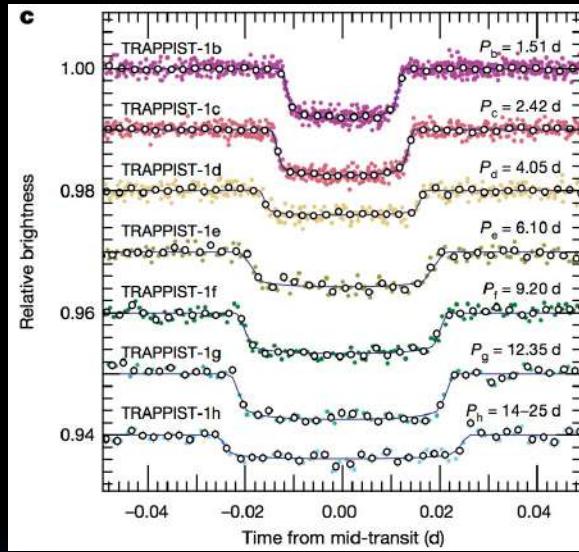
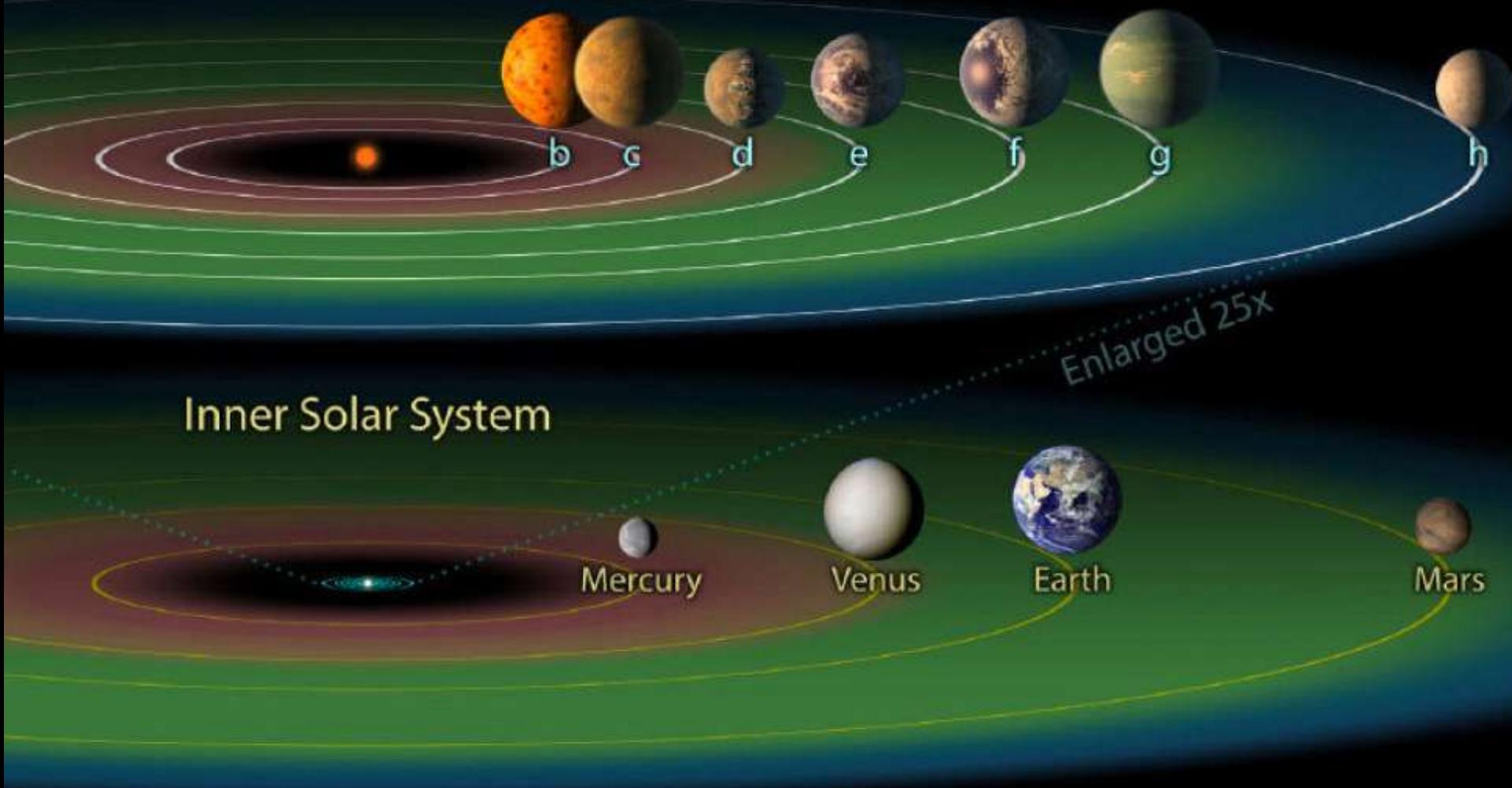
Habitable zone for different stellar masses



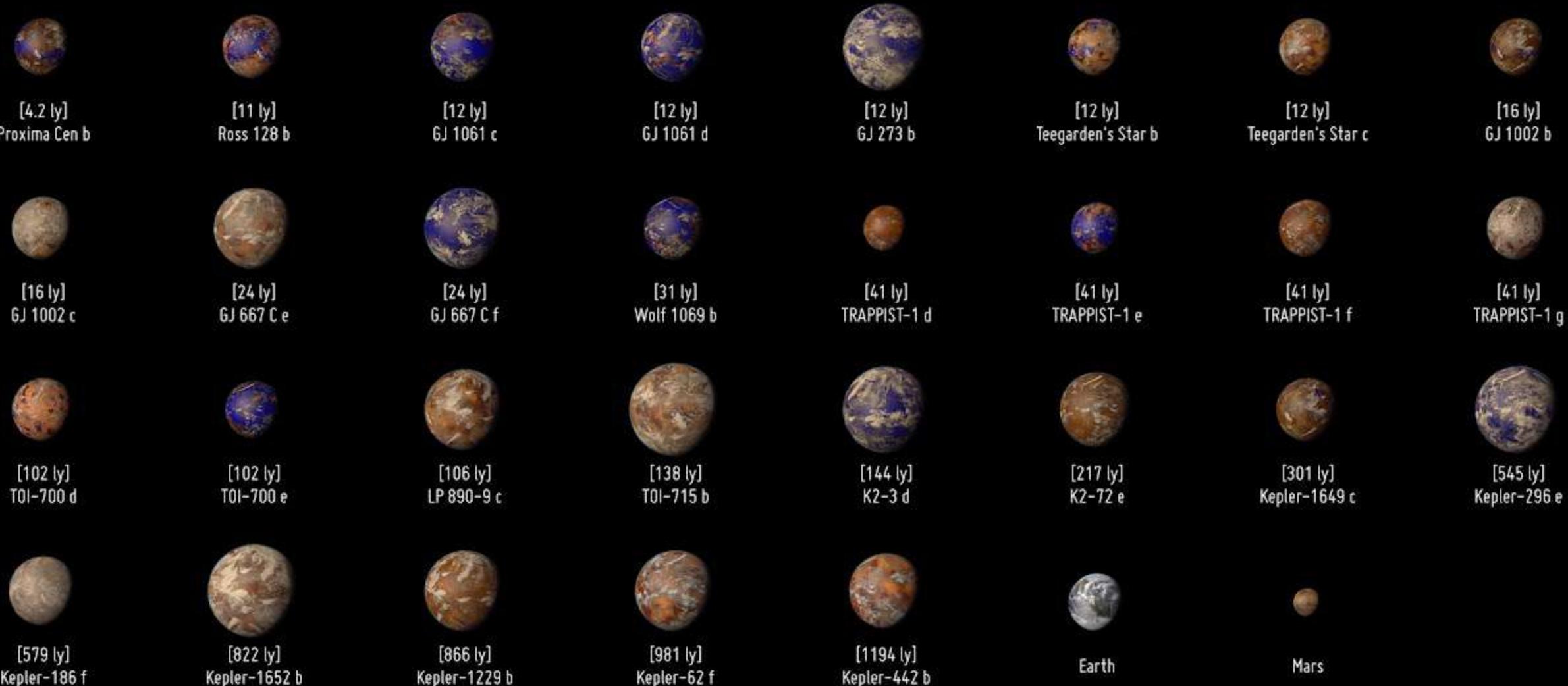
Selsis et al. (2007)

TRAPPIST-1: Seven Earth cousins

TRAPPIST-1 System



Potentially Habitable Worlds

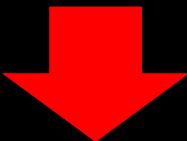


Artistic representations. Earth and Mars for scale.

Planets are organized in order of their increasing distance from Earth (shown between brackets in light-years).

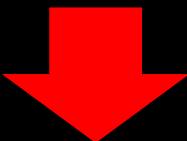
CREDIT: The Habitable Worlds Catalog, PHL @ UPR Arecibo (phl.upr.edu) Jan 2024

POTENTIALLY HABITABLE
(IN HABITABLE ZONE AND ROCKY)



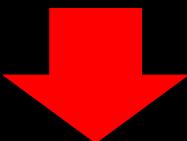
HABITABLE
(WITH SURFACE LIQUID WATER)

?



INHABITED
(WITH A BIOSPHERE)

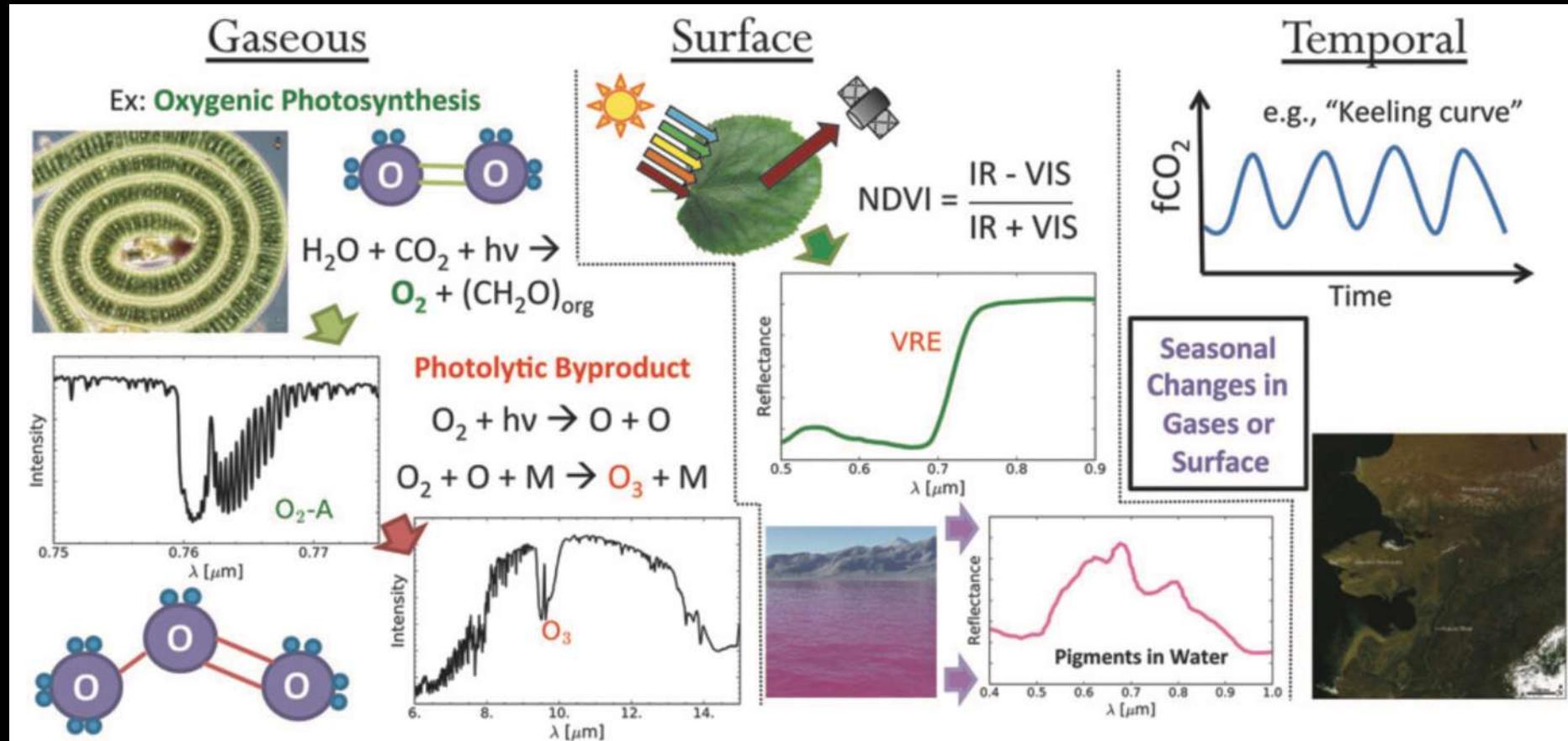
??



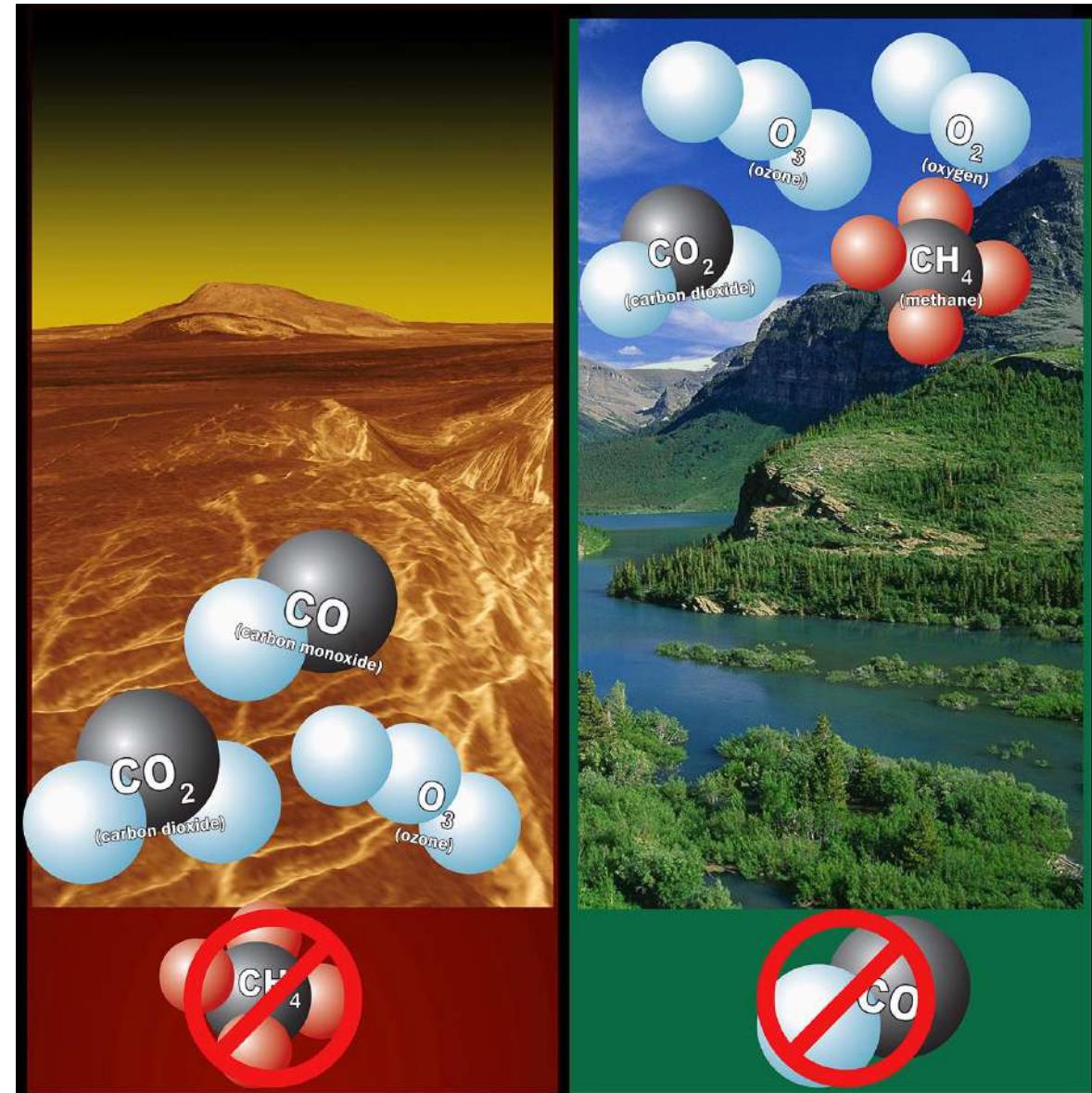
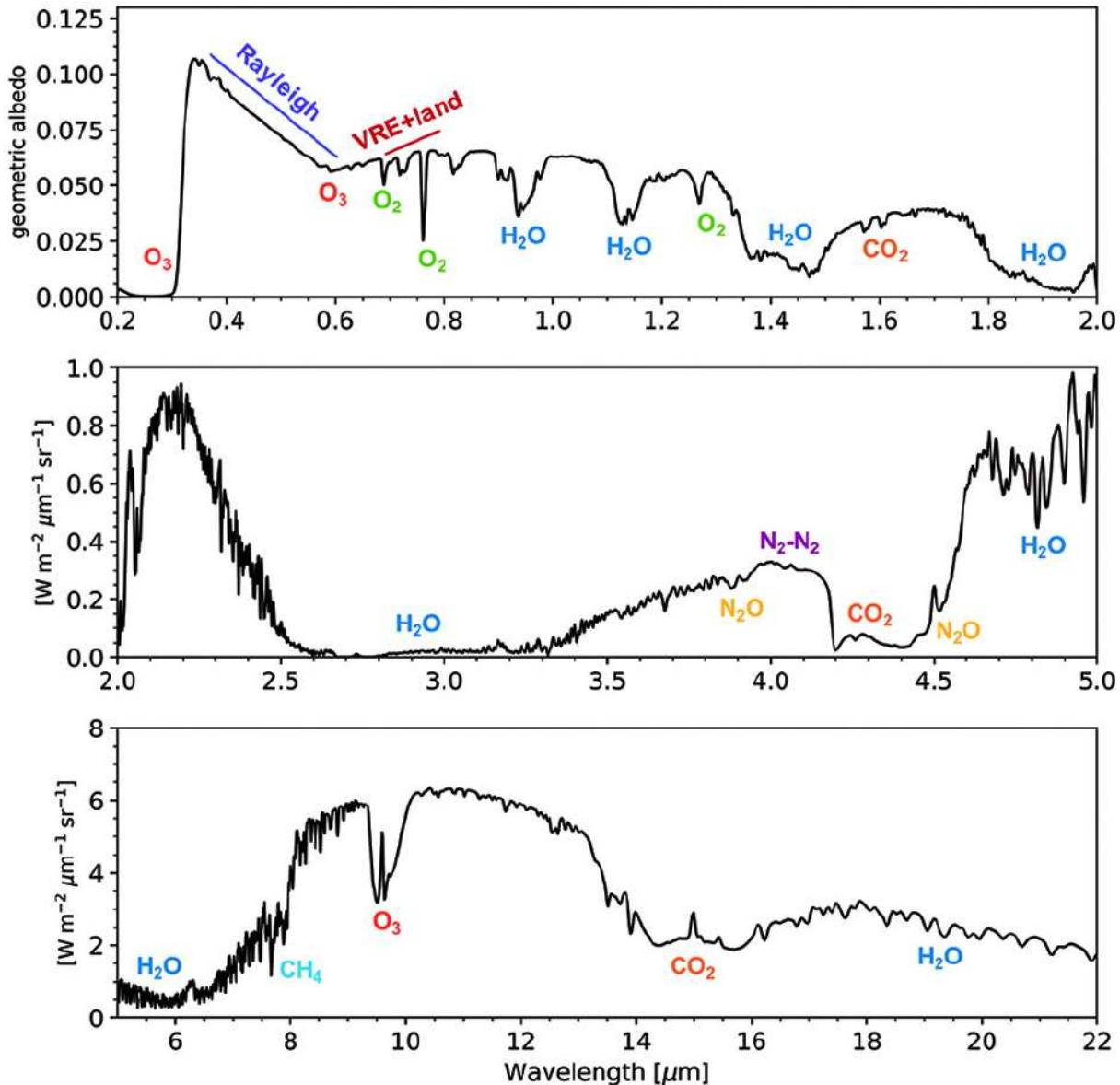
SUITABLE FOR HUMANS
(WE CAN BREATHE)

???

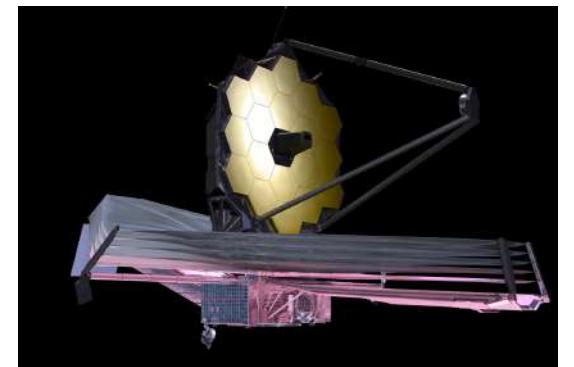
- Biosignature \Rightarrow object, substance and/or pattern that requires a biological agent
- Remote sensing \Rightarrow We will not resolve an exoplanet \Rightarrow Life signs should be a global phenomenon



Biosignatures

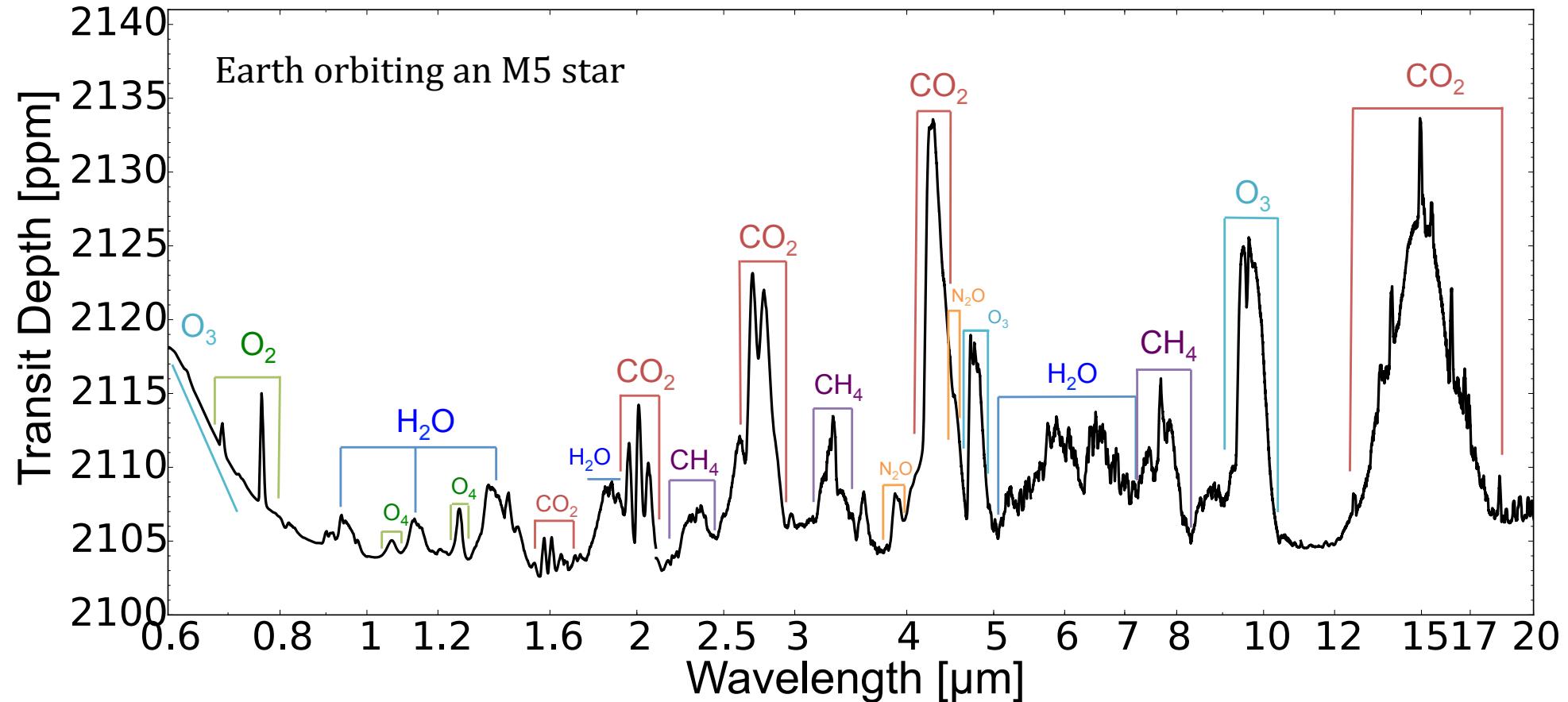


Biosignature detection with JWST



Transmission spectroscopy

Misra et al. (2014)



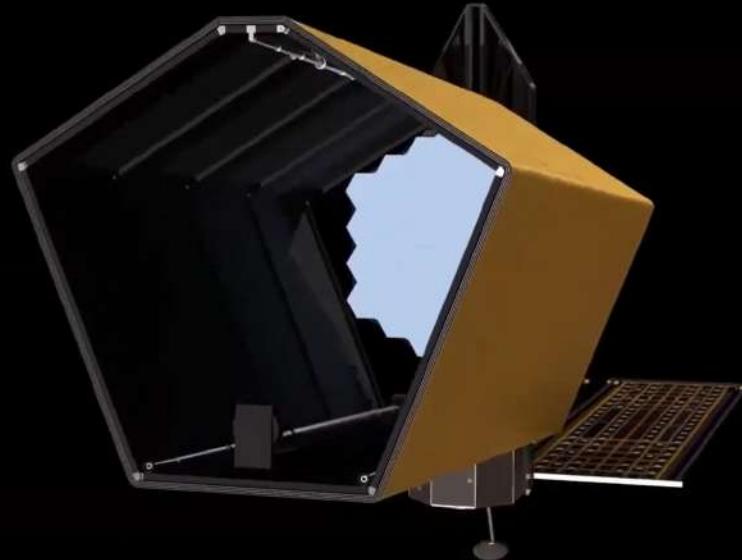
Signals of 2-30 ppm. Water vapour a few ppm.



Habitable Worlds
OBSERVATORY



Habitable Worlds Observatory
Simulated Solar System Time-lapse
Observed from 33 light-years away
Time = 10 years, 1 second = 72 days



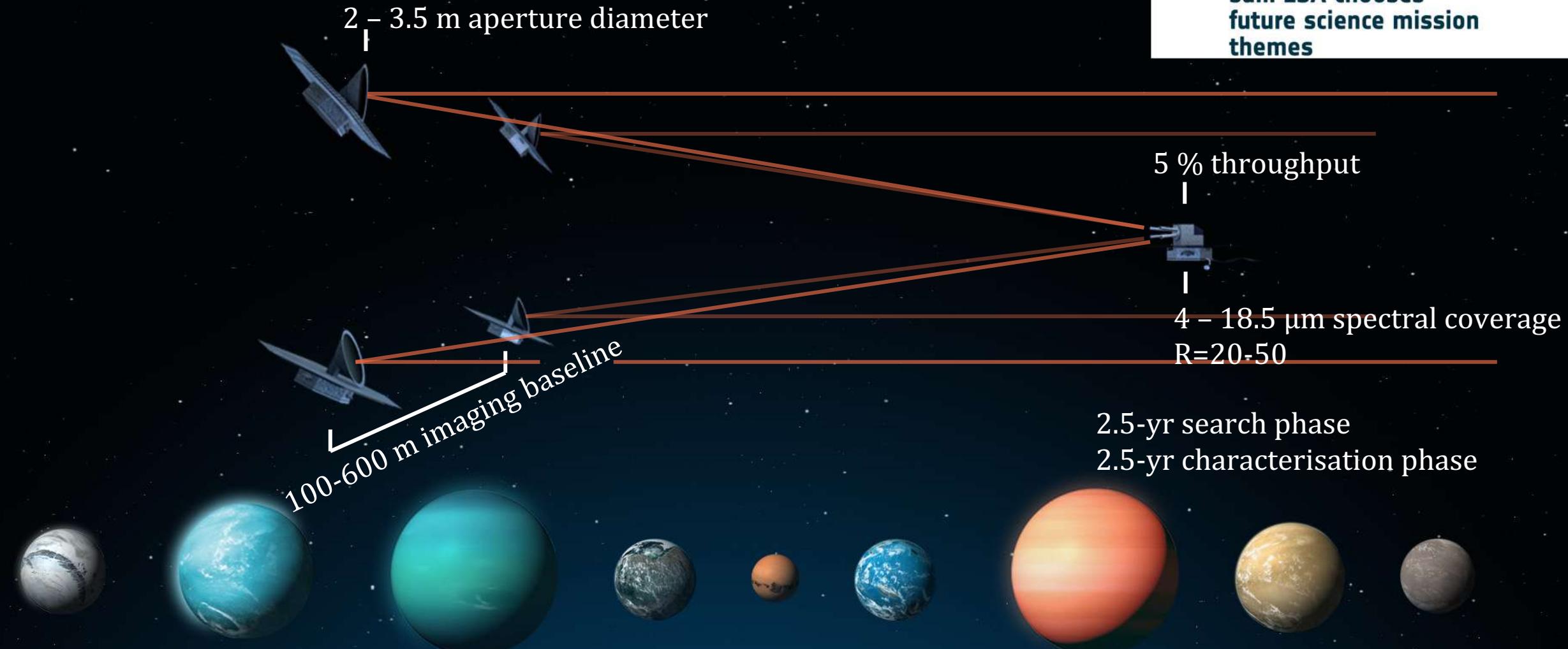


- Goals:**
- Assess habitability
 - Search for biosignatures
 - Study the diversity of terrestrial planets



SCIENCE & EXPLORATION

Voyage 2050 sets sail: ESA chooses future science mission themes



SPITZER
1 m, infrared, NASA



HST
2.5 m
NASA/ESA

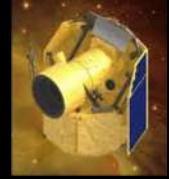
Kepler
1 m, NASA



TESS
4x10 cm, NASA

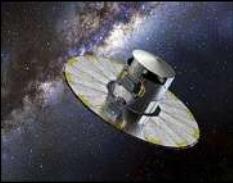


CHEOPS
30 cm, ESA

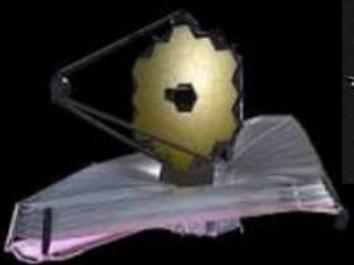


Space

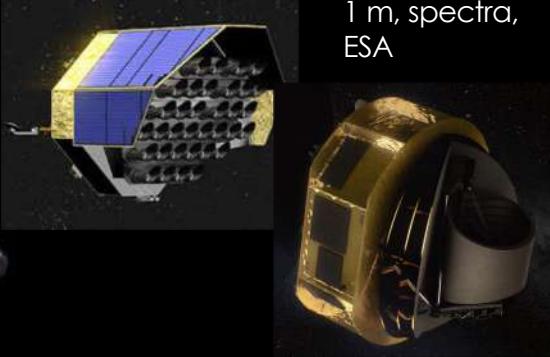
Gaia
1 m, astrometry,
ESA



JWST
6.5 m,
NASA/ESA/CSA



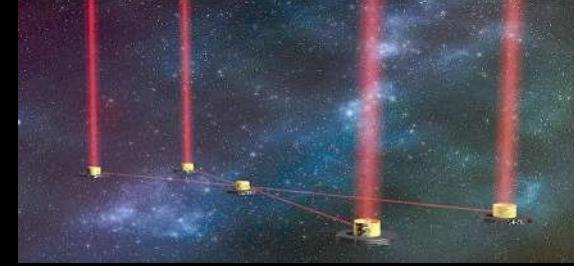
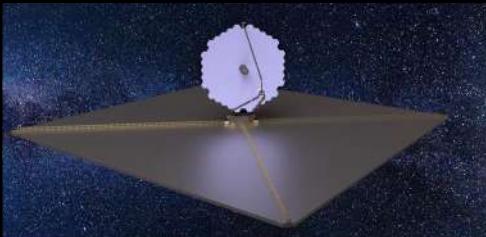
PLATO
26x12 cm, ESA



ARIEL
1 m, spectra,
ESA



HWO (2020 Decadal)
6 m, NASA



LIFE? (Voyage 2050)
4x2.5-m ESA

NOW

Ground



Direct imaging
10-m class telescopes
SPHERE/ESO
GPI/Gemini

Transit searches
10 cm-1.5 m telescopes
TrES, WASP, HAT, NGTS,
MEarth, SPECULOOS, QATAR



Doppler spec.
2-m class telescopes
HARPS (ESO)
ESPRESSO
CARMENES
HARPS-N, GIANO
APF, PFS, NEID, HPF

**Radio emission
searches**
LOFAR
GMRT



Microlensing
0.5-m class telescopes
OGLE, LCOGT

2025



**Direct imaging and
spectroscopy**
30-m class telescopes



2030

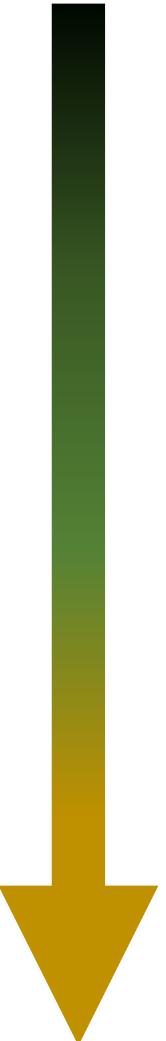


2040

The big challenges

- Planetary architectures in solar-type stars
- Atmospheres of a great diversity of planets
- Climates + physical-chemical processes + geology
- Main constituents of rocky temperate exoplanets:
 - Atmospheres dominated by N₂/CO₂?
 - Presence of H₂O?
 - Presence of biosignature gases O₂ – CH₄?
 - Biosignature gases due to biotic or abiotic processes?

Orders
in science



Pale Blue Dot

Voyager 1, 1990

