Ground-based characterization

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What kind of gb observatory for exoplanets?

Both small telescopes with easy access (dedicated) and niche instruments ... and large telescopes with amazing collecting area and instruments





What do we call characterization?



Fundamental parameter characterization

	Measured parameter	Biases
Transits	Radius, orbit inclination, period	Close-in, large, only aligned
RV	Minimum mass, eccentricity, period, obliquities when transit	Close-in, massive, quiet stars
Astrometry / interferometry	Mass, inclination, separation	Outer, closeby systems
Direct imaging	Luminosity (age, mass), astrom	Young, massive, hot planets

Various techniques give different constraints and have different biases

There is a growing overlap between these various technics: more complete



Atmospheres characterization

Method	Access to	For
Transmission spectroscopy	Composition Temperature-Pressure profile	Close-in planets in transit
Eclipses/phase curves	Thermal/reflection spectrum of day side	Close-in planets
Direct imaging	Mean thermal spectrum	Distant planets

Optical	Na, K, Fe, Ca, H, Hel, TiO, VO, FeH,Rayleigh scattering H ₂
nir	H ₂ O, CO, CO ₂ , HCN, NH ₃ , C ₂ H ₂ , Hel, CH ₄

Exoplanet searches started from the ground

- First radial-velocity discoveries of exoplanets (mid 1990s)
- First transit of a hot Jupiter (1999)
- First ground-based transit surveys (2000s)
- First ground-based transmission spectra (2010s)
- First ground-based direct-imaging exoplanet (2010s)
- First ground-based astrometric exoplanet results (2020s)

Radial velocities

6 parameters to adjust per planet: $V_{rad} = V_0 + K \cdot [\cos(\nu(t) + \omega) + e \, \cos \omega],$ $K = \frac{m \sin i}{(M_* + m)^{2/3}} \cdot \frac{(2\pi G)^{1/3}}{P^{1/3}\sqrt{1 - e^2}}$ Alysa Obertas (@AstroAlysa) 10 -5-Speed (m/s) 0--5--10

Instruments: HARPS, SOPHIE, ESPRESSO, SPIRou, EXPRES...



Astrometry

Measuring actual masses

More efficient for outer planets (a_p)

Depends on stellar distance (D)



Instruments: Gaia, SPHERE, GPI, VLTI/Gravity...





ExoGravity project, 50-100 microarcsec precision

Lacour+ 2019

Transit: radius, period, inclination

Dimming of starlight: radius of planet relative to the star

$$\Delta F = \frac{F_{off} - F_{on}}{F_{off}} = (r/R)^2$$

Jupiter-Sun~1% Earth-Sun~0.008% with a probability:



Instruments: Corot, Kepler, TESS, PLATO, and gb surveys!



Ground based transit surveys

Surveys like SuperWASP, HAT, NGTS, Mearth, SPECULOOS...

Small telescopes monitoring the sky for years

~400 exoplanets altogether (10 times more from space)



Bright stars: RV follow-up easier than for space-based candidates

Atmosphere characterization easier on WASP## than most Kepler##

Still useful w/ TESS, especially for monotransits



WASP-166b transit, NGTS and TESS



Transits and radial-velocities: a win-win



Precise orbital period and phase

Planetary radius

Orbital inclination



Orbital eccentricity

Actual planetary mass

Planet bulk density / nature



Mass✓Radius, when transiting✓Orbital parameters✓

Obliquities : the Rossiter-McLaughlin effect

- The star rotates during the transit
- The planet crosses the blue half first, then the red half
- It results in a small RV anomaly
- The shape of that anomaly measures the relative angle between the rotation axis of the star and the planet's orbital plane











Direct imaging: luminosity, orbit

Planets discovered by the direct imaging: giant, outer, young, self luminous Hot start or cold start? Formation history

Luminosity as a function of mass and age

Teff and log(g)

Chemical composition (Molecular content, C/O, [M/H])

age, mass, radius with evolution models

GB photometry of EGP

Multiple wide-band photometry JHKLM

First way of identifying low-mass young companions (spectral type , spectral indices)

Young, low-gravity objects : red sequence wrt older, higher-gravity field objects (stars) Desgrange+ 2022



GB direct LR spectroscopy

Instruments: VLT/SPHERE, Gemini/GPI, P1640, SCExAO-CHARIS

R ~ 100

Chemistry: CH₄ bands, H₂O bands

Gravity: lower when collisionally-induced absorption of H₂ is weak => H-band peaks and redder K-band slopes

Presence of atmospheric dust (flat, BB like spectra)

Presence of clouds

Degeneracies exist between all these parameters





GB direct MR spectroscopy

Instruments: Keck/OSIRIS, VLT/SINFONI, XSHOOTER, MUSE, Gemini/NIFS, GRAVITY...

R ~ 500-5000, smaller spectral range

FeH, CO, H20, CH4, Nal, KI, more accurate abundances than LR

Characterizing gravity, accretion, composition, C/O, orbital velocity

Main limitation comes from noise in the stellar halo @planet location



Atmospheric Transmission Spec from the ground, early work

Seeking the Atmospheric Transmission Spectrum of HD209458b

Show affiliations

Brown, T. M.; Butler, R. P.; Charbonneau, D.; Noyes, R. W.; Sasselov, D.; Libbrecht, K. G.; Marcy, G. W.; Seager, S.; Vogt, S. S.

Transiting extrasolar giant planets such as HD209458b should impress a spectroscopic signature on the light that is transmitted through the outer parts of their atmospheres. Theory suggests that the depths of absorption features resulting from this effect may be as large as about 10⁻³ of the parent star's continuum intensity. Such spectral features could provide important diagnostics concerning the composition and physical state of the planetary atmosphere. Accordingly, we have obtained low-noise spectra of HD209458 during two transits of its planet, once in visible light using the HIRES spectrograph at the Keck I telescope, and once in the near infrared using the NIRSPEC spectrograph at Keck II. We describe the methods employed and the results of searches for spectral and molecular species.

Publication: A

American Astronomical Society, 197th AAS Meeting, id.11.05; Bulletin of the American Astronomical Society, Vol. 32, p.1417

A Search for Transit Effects in Spectra of 51 Pegasi and HD 209458

KEVIN A. BUNDY¹ AND GEOFFREY W. MARCY^{1,2} Received 2000 June 15; accepted 2000 July 27

ABSTRACT. We have used high-resolution optical spectra to search for obvious absorption or remission lines from the planets orbiting HD 209458 and 51 Pegasi. For each star, two spectra were obtained during inferior conjunction, enabling the detection of absorption lines from the planetary atmosphere. Spectra were also examined at a full range of orbital phases. The search involved subtracting spectra during transit from reference spectra taken out of transit. We found no significant variations in the spectra of HD 209458 and 51 Peg at any orbital phase, with typical detection thresholds of several percent. Velocity measurements of HD 209458 209458 taken do minutes after midtrasmit fall ~20 m s⁻¹ below the Kepterian fit, presumably due to the planet removing flux from the receding hemisphere of the rotating stellar surface. This is consistent with the planet orbiting in the same direction as the star spins, in agreement with recent work by D. Queloz and coworkers.

Search for spectroscopical signatures of transiting HD 209458b's exosphere*

C. Moutou¹, A. Coustenis², J. Schneider², R. St Gilles², M. Mayor³, D. Queloz³, and A. Kaufer¹

INFRARED OBSERVATIONS DURING THE SECONDARY ECLIPSE OF HD 209458b. I. 3.6 MICRON OCCULTATION SPECTROSCOPY USING THE VERY LARGE TELESCOPE¹

L. JEREMY RICHARDSON,^{2,3,4} DRAKE DEMING,² GUENTER WIEDEMANN,⁵ CEDRIC GOUKENLEUQUE,^{2,6} DAVID STEYERT,^{2,6,7} JOSEPH HARRINGTON,⁸ AND LARRY W. ESPOSITO³ Received 2002 July 31; accepted 2002 October 29

Searching for helium in the exosphere of HD 209458b*

C. Moutou¹, A. Coustenis², J. Schneider³, D. Queloz⁴, and M. Mayor⁴

A new method for probing the atmospheres of transiting exoplanets

I. A. G. Snellen*

Searching, not finding (2000-2004) 0.1-1% upper limits

Atmospheres from the ground: first detections (2008)

SODIUM ABSORPTION FROM THE EXOPLANETARY ATMOSPHERE OF HD 189733B DETECTED IN THE OPTICAL TRANSMISSION SPECTRUM¹

SETH REDFIELD,^{2,3} MICHAEL ENDL,² WILLIAM D. COCHRAN,² AND LARS KOESTERKE^{2,4} Received 2007 November 2; accepted 2007 December 5; published 2008 January 4



11 HRS transits combined0.067 ± 0.02%-38km/s blueshift!

 $0.135 \pm 0.017\%$



Ground-based detection of sodium in the transmission spectrum of exoplanet HD 209458b

I. A. G. Snellen, S. Albrecht, E. J. W. de Mooij, and R. S. Le Poole

Spectral resolution is key

LR: confusion btw planet/star/Earth lines

- Nir and optical spectrographs R = 40 to 100k
- Use the orbital motion of the plane separate its spectrum from the ste spectrum
- Planet spectrum moves by several pixels during a few obs hours
- Detection of atm winds

Instruments: CRIRES, CARMENES, HARPS, ESPRESSO, SPIRou...

Snellen et al 2010, CRIRES



Planet detection increases as $\sqrt{n_{lines}}$



Birkby 2018





2.314		Inclination (degrees)	Mass (M _{Jup})	Reference	Tell
un /	τ Boötis b	45.5±1.5	5.95±0.28	Brogi+12	
ff ^{2.312}	51 Pegasi b	>79.8	0.46±0.02	Brogi+13	
euć	HD 179949 b	67.7±4.3	0.98±0.04	Brogi+14	
2.310	HD 88133 b	15 ⁺⁶ –5	1.02+0.61_0.28	Piskorz+16	
Ň	υ And b	24±4	1.70+0.33_0.24	Piskorz+17	
2.308	HD 102195 b	>72.5	0.46±0.03	Guilluy+19	1.0





HRS characterizing (non) transiting planets



Clean data Forward modeling Cross-correlation map Systemic velocity/Kp

CO signal in the dayside spectrum of tau Boo b (Brogi et al 2013)

HRS : dayside and nightside for transiting systems



High spectral resolution of non-transiting planets



Dayside versus nightside detection limits & wavelength

De Kok+ (2014) for HD 189733 b: H2O, CO, CO2, CH4, HCN, C2H2

Relative sensitivities btw day/night depends on thermal profile



Power of echelle spectroscopy

All molecular species simultaneously

Seeing above the cloud deck at high resolution

HRS breaks degeneracy between H2O abundance and cloud top pressure

High potential to characterize super-Earth/sub-Neptune planet atm



Atmospherix (SPIRou looking at exoplanet atmospheres)

Wavelength range: 980-2500 nm at 70k resolution, in one shot

Goals:

- Detecting molecules in the atmospheres of hot Jupiters and warm Neptunes 1.
- 2. Estimating the PT profile and the amplitude of atmospheric winds
- 3. Characterizing the extended atmosphere through helium Doppler spectroscopy



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Blueshifted evening limb - Hot Large absorption depth



Sometimes there's no water

Thermal emission observations of τ Boo b with CFHT/SPIRou

volume mixing ratio of $log(CO) = -2.46 \pm 0.29$

a highly depleted water abundance < 0.0072 times the value expected for a solar composition envelope

gas-phase C/H ratio of 5.8 × solar ~ the value of Jupiter

support a formation scenario beyond the water snowline in a disk enriched in CO due to pebble drift



Pelletier et al, 2021

Power of echelle spectroscopy (cont'd)

All molecular species simultaneously observed with GIANO/TNG

Significant detection: H2O, CH4, CO, HCN, C2H2, NH3

C / O > 1

HD 209458 b formed far in system



Fig. 1 | Detection significance for H₂O, CH₄, NH₃, C₂H₂, HCN, CO and CO₂. Each panel

Giacobbe+ 2021

Weather patterns on EGP!

Ultra-hot giant exoplanet

Spectral and **temporal** variations w/ VLT/ESPRESSO

Differentiating day/night sides of evening and morning limbs

Day-to-night wind profiles

T-P profiles and Fe abundance



Gandhi+ 2022

Prospects extend to searching for biosignatures (ELTs)

O2 on an Earth-like planet around a nearby M star vs CO/tau Boob

Snellen + (2013) ; see also Hood+ (2020)



Pros of both LRS and HRS

LRS	HRS
Broad wavelength coverage	Resolution of individual lines
No tellurics	Can detect above clouds
Global slope of the spectrum	Access to wind dynamics

Extended atmospheres

Metastable Hel, very large signatures expected

EUV/X flux, planet density

Similar evaporation rate btw GJ3470b (hNep, cold extended atm) and HD189733b (hJup, hot compressed atm)

low mean molec mass for both

Planet magnetic field possibly plays a role

Allart+17, Salz+18, Palle+20, Lampon+21, Zhang+21, etc.





1%



Mass Radius Orbital parameters Composition Temperature-pressure profile Wind dynamics Interactions with stellar wind

ExoAtmospheres

IAC community database for exoplanet atmospheric observations



Home E	xoAtmos Table	ExoAtmos Plots	Submit observation	Latest publications	Latest submissions	Subscribe	Abou
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ExoAtmospheres database

Use the search... boxes to filter data by column value. For numeric values you can use comparison symbols like >, <, >=, <= and logic operators.

- Numeric values: Try range values like ≥=1300 , >200 && <1000
- Exoplanet name wasp-1 will find all names having the wasp-1 string, while "wasp-1 b" will find all exactly that string.
- Exoplanet name: TOI planets are written as TOI-#### b .
- Molecules: H2 will find all molecules having the H2 string, like H2 and H20, "H2" will only find exactly H2. H2 |C finds H2 OR C strings, C0 & Na finds CO AND Na strings. Use "H2" or "C" |H20 to find exactly such string.
- Planet Type: is defined by the combination of Radius and Teq.

														Change to Earth units	Export to CSV
Exoplanet 🔺	Туре	Period (d)	Radius (R _J)	Mass (M _J)	Teq (K)	Vmag	Jmag	Kmag	TSM	ESM	Albedo	Ph curve	Occultation	Molecules	
Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Try: CO or H2 && CH4	
51 Peg b	Hot Jupiter	4.2308	1.9	0.47	1378	5.49	4.655	3.911	7479.0375	2593.6543	Yes	Yes	No	CO H2O	Exoplanet.eu*
55 Cnc b	Warm Jupiter	14.6531	1.9484	0.84	736	5.95	4.768	4.015	3820.3183	1298.2397	No	No	No	н	Exoplanet.eu*
55 Cnc e	Hot Super-Earth	0.7365	0.1737	0.027	1996	5.95	4.768	4.015	249.7917	71.5094	No	Yes	No	Ca+ Ca Fe+ Fe H HCN He He Mg Na	H Exoplanet.eu

118 different planets have been analyzed and 45 different molecules have been detected

When lines are also in the stellar spectrum

Spurious signature when exoplanet lines also in the star spectrum

Take into account/correct Rossiter effect and center-to-limb variations

Deformation of stellar line cores due to occulting planet

These effects are small when signal in low res (wings, continuum)



HD 189733b, 0.75 A HD 189733b, 0.75 A 1.000 0.998 0.998 0.996 CLV Na absorption 0.994 0.992 0.04 0.02 0.02 0.04

E.g. Yan+2017, Casasayas-Barris+2021

Planetary parameters come as function of stellar ones

Radial velocities \Rightarrow M_p sini / M_s

Transits $\Rightarrow R_p / R_s$

Atmospheres ${\rm R_p}(\lambda)$ / ${\rm R_s}(\lambda),$ ${\rm K_p}$ from ${\rm K_s}$

Planetary and stellar metalicities are interesting to compare

So it is critical to have accurate and precise stellar parameters

Spectroscopic: Teff, logg, M/H Fundamental (models): mass, radius, age

Stars have their own character

- Stellar surfaces are not quiet
- Stellar activity is wavelength dependent
- Stellar surfaces vary at many timescales, from minutes to years
- Impact on indirect measurements
- There are usually weak correlations between various activity tracers (photosphere, chromosphere and corona)
- Characterising rotation period, activity amplitude, flaring level



Transits and activity

A very active light curve does not prevent the detection and precise characterisation of ~ large planets

Spot activity and dynamo cycles can be observed through planet-spot crossings

Modification of transit curve by spot crossing is chromatic (temperature contrast)







Alonso+ 2008, Morris+ 2017

Unocculted structured are worse

Spots not occulted by the planet diminish the star brightness: increase the transit depth

In some cases, faculae can dominate the effect and inverse the impact (decrease transit depth)

The effect is chromatic

Amplitude of 0.1-1% depending on star's activity level and wavelength



Pont et al 2008 : effect of adding unocculted spots absorbing 1% of the stellar flux (open squares), and of changing the mean temperature of the spots from 4000 K to 3500 K (solid squares).

Not assuming the star is homogeneous

The Transit Light Source Effect



Rackham et al 2018, 2019

How to characterize stellar activity?

Photometry (space)

Xrays (space)

RV/spect indices (ground)

Warning: degeneracies



1.03

alized flux

0.99

Stellar magnetic field: spectropolarimetry

Stellar magnetic fields are at origin of activity

They can be traced with circular polarization in lines at HRS (Spirou, Espadons, HARPS-POL, PEPSI)

Vector magnetic field 4.0 0.2 (%) رام را 0 0.000 0.2 4.0 50 -50 0 100

Velocity (km/s)

Stellar magnetic field: spectropolarimetry

Stellar magnetic fields are at origin of activity

They can be traced with circular polarization in lines at HRS (Spirou, Espadons, HARPS-POL, PEPSI) Vector magnetic field



From mean intensity profiles to brightness map

From collections of intensity profiles, find out the distribution of spots and plages

Slow stellar host rotators are more difficult to characterize

AU Mic, SPIRou, HARPS (Klein+ 2021, 2022)





From circular polarisation profiles to magnetic map

From collections of circular polarisation profiles, find out the topology and strength of the stellar magnetic field

Field measurements show a robust measurement of the stellar rotational period

AU Mic, SPIRou (Klein+ 2021)









Exoplanet characterization: complementarities

Planets' radii measurements from space, mass measurements from the ground







Planetary Mass (Mjup)

UV and mid-IR from space, optical and nIR from ground/space

Complementarities

Recent attempts to combine LR and HR nIR observations

Combine space sensitivity and velocity resolution

Make any detection more robust

Underlying model is unique (chemistry, T-P profile, winds...)

Computationally intensive



Figure 1. Dayside spectrum of HD 209458 b. Bottom: LDS data (WFC3+*Spitzer*, black diamonds), with the best-fitting low-resolution model spectrum and its *l* uncertainty overplotted in red. Top: best-fitting HDS model from this analysis, matching the range of CRIRES 2.3 μ m data.

Brogi+ 2017



Figure 8. Simulated combined observations with HST/WFC3 (black dots, top panel) and VLT/CRIRES around 2.3 μ m (blue lines, top panel). The bottom panels show the posterior distributions for planet metallicity ([M/H]), carbon-to-oxygen ratio (C/O), and *T*-p profile (bottom-right panel; summarized with the 68% confidence intervals) obtained by running our framework on the *HST* data alone (red curves), VLT data alone (blue curves), and on the combined data set (magenta curves). The dashed curves (blue = CRIRES, red = WFC3) are the temperature Jacobians at the indicated wavelengths (on and off band/ line). In general HST WFC3 probes a relatively deep and narrow region. In contrast, the high dynamic range in the CRIRES spectrum permits broad altitude coverage. Combining low- and high-resolution spectra leads to a substantial improvement in the precision of these measurements.

Brogi & Lin 2019

Complementarities

how planetary atmosphere characterization can be hampered by stellar contamination:

need for complementary stellar characterization



Rackham+ 2019: impact of stellar activity on retrieved atm Klein+ 2019: forward modeling on photometry and RV time series





Instrumental innovations from GB telescopes, a bright future

GRAVITY+ SPHERE+ HIRISE (SPHERE+CRIRES+) demonstrator ESPRESSO+CRIRES+ ELT instrumentation: ANDES, HARMONI, METIS

More combined campaigns would help: one system, night/day sides, simultaneous stellar analyses, combined planet retrieval

Combine high-contrast imaging w/ high-resolution spectroscopy Combine space low-res wide-band and ground high-res spectroscopies



Take home

- Ground-based instruments have a role to play!
 - Mass measurements (RV & astrometry, indirectly with atm characterization)
 - Orbital param and transit ephemeris (RV, astrom, photometry)
 - Obliquities (RV)
 - Atmospheres in direct spectroscopy (AO+medium resolution IFS)
 - Atmospheres in transmission (HRS)
 - Atmospheres in eclipses (HRS)
 - Atmospheres, planet mass, at superior conjunction (HRS)
- Keep an eye on the host star
- Play the complementarity between methods and instruments

Atmospheres characterization

	Low R, space	High R, ground	
Sensitivity			small planets or faint stars
Continuum (low frequencies)			Rayleigh scattering, clouds
Telluric contamination			nIR, time dependent, wave range
Stellar contamination			Rossiter-McLaughling, Activity
Telescope access/instr upgrades			Resolution, stability
Degeneracy in atm retrieval			Resolving indiv lines, wind dynamics
Length of sequences			6h max from the ground/multiT