

INAF - OSSERVATORIO ASTRONOMICO DI CAPODIMONTE





The (Physics of the)Cosmic Distance Ladder

Cosmology and fundamental physics with current and future ESO facilities

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An astrophysical view on the distance ladder → Impact of the distances on Ho → Classical Cepheids (by contract) **RR Lyrae (& TRGB)** → (some) Core-Collapse Supernovae → The near future (Gaia, JWST, LSST, E-ELT)

Why Variable Stars and Transients?

- Tracers of different stellar populations
- Physics Labs
- Standard Candles:
 - •RR Lyrae \rightarrow Old (\geq 10 Gyr) \rightarrow all galaxies; distances within the LG
 - Cepheids \rightarrow Young \rightarrow disks, late type irregulars; distances up to ~ 25 Mpc
 - •Type Ia SNe \rightarrow ubiquitous; cosmological distances
 - Type IIP SNe (yes, type IIP SNe!) → young progenitors; current distances up to z ~ 0.4 (but we will go cosmological with E-ELT)
 - Type lb, lc and superluminous SNe as Standardizable Candles



SCALING THE UNIVERSE

PARALLAX

The most accurate method of measuring distance. Astronomers look at a star when Earth is on opposite sides of its orbit. The star shifts position with respect to more-distant stars. The size of the shift reveals the star's distance.

CEPHEIDS

These big, bright stars pulse in and out like a beating heart. The length of the pulse reveals the star's brightness. Comparing true brightness to the star's apparent brightess reveals its distance. Used to measure nearby galaxies.

SUPERNOVAE

Certain types of exploding stars brighten and fade in a way that reveals their true brightness, which astronomers then use to calculate their distances. Effective out to several billion light-years.

REDSHIFT

Astronomers use several techniques to measure the

distances to stars and galaxies. These techniques overlap, providing greater confidence that each one is accurate.

> Distant galaxies move away from us because the universe is expanding. Astronomers can measure this motion, which varies with distance: faster galaxies are farther away. Least-accurate method because it depends on models of how the universe is expanding.



The CCHP Pathways to a 3% Determination of the Hubble Constant



There is evidence that Type II Cepheids

(2-3 mag brighter than RR Lyrae)

are also going to play a crucial role

Classical Cepheids

Classical Cepheids in a nutshell

- Radially pulsating variable stars
- Main Sequence progenitors between 2 and 20 M_☉ (some of them will explode as Supernovae!), but most of the MW Cepheids are in the mass range 4-9 M_☉
- Periods between 1 and 100 days (but Cepheids with longer periods have been detected
- Absolute magnitudes between M_V ≈ -2 mag and M_V ≈ -6 mag → bright objects → visible at large distances
- The absolute magnitude depends (basically) on the period → distances!!





Cepheid Instability Strip

Intermediate-mass stars central Heburning phase



Why stars pulsate?



K & Y mechanisms

Radial Modes





Basic leading physical arguments



Mbol = const + 5log R + 10log Teff Stefan-Boltzmann

P = J(R/g) von Ritter relation
g=surface gravity
P = Q / Jρ

Period-Luminosity-Color

Mbol =
$$\alpha$$
 + $\beta^* \log P$ + $\gamma^* \log Teff$
M_X = α + $\beta^* \log P$ + $\gamma^* CI$

Warning! The Period brings in the Stellar mass This means that PLC & PL implicitly include the Mass-luminosity relation.

... but the pulsation models are envelope models!!

This opens the path to the marriage of convenience between stellar evolution and stellar pulsation

The ML relation and the metallicity dependence are fundamental ingredients ...

We were facing a stark discrepancy between evolutionary & pulsation masses (Christy 1968)

The former ones 30-40% larger than the latter ones

Discrepancy alleviated by the "new" opacities [Livermore & OP] → at the 10-20% level

NO ACCURATE MEASUREMENTS OF THE DYNAMICAL MASS OF A CEPHEID!!



Caputo et al. (2005)

Double-lined, well detached eclipsing binary (OGLE) in the Large Magellanic Cloud



Pietrzyński + Nature 468, 542–544 (2010) + ESO Press Release

> The procedure adopted to separate Pulsation & orbital motion of the Cepheid





Change of brightness of the binary system caused by the mutual eclipses, and the intrinsic change of the brightness of the Cepheid

The pulsational masses based on period & mean radius provide masses that, within theoretical and the empirical uncertainties, agree quite well with dynamical mass.

Mdyn= 4.14 ± 0.05 Mo Mpul = 3.98 ± 0.29 Mo Cepheid Pulsation & Evolutionary Properties

Cepheid do obey to a PLC relations (consequence of a Mass-Luminosity relation)

$$\frac{\log L}{Lo} = \alpha + \beta \log P + \gamma \log Te}{MV} = \alpha + \beta \log P + \gamma CI$$

The PL neglects the width in temperature of the IS This assumption is valid in the NIR, but not in the optical [σ (V)=0.2-0.3 mag] Why we use PL instead of PLC relation?

Observations: sensitivity to reddening uncertainties Theory: sensitivity to color-temperature relations



Lack of homogeneous metallicity scale for MW and MC Cepheids

Reddening law: MW + external gal.

Metallicity gradients based on Oxygen abundances: $\rightarrow 0$ is an α -element ...

 \rightarrow Strong nebular emission lines in HII regions

 \rightarrow Blue & Red supergiants \rightarrow Kudritzki et al. (2015)



Recipe for Ho 1.5-1.8%

→Calibrating SNIa

 \rightarrow Zero-point of PL relation

→Metallicity dependence of zero-point and slope

Cepheids allow us to calibrate SNIa in spirals but not in ellipticals \rightarrow RR Lyrae + TRGB

How can we settle the zero-point and the metallicity dependence?

- 1) Spectroscopic Route HR spectra Galactic & Magellanic Cepheids
- 2) Period-Wesenheit relations Galactic & Magellanic Cepheids
- (3) Extragalactic Route Homogeneous analysis of all available data

4) LMC depth effects

1) Metallicity dependence: V-band



The PLV relation is not Universal (95% confidence level)

Not affected by LMC distance

MP & MR Cepheids are located at 2 and 9 σ from zero. The difference bewteen MP & MR is at 3 σ

1) Metallicity dependence: V-band



The PLV relation is not Universal (95% confidence level)

Not affected by LMC distance

MP & MR Cepheids are located at 2 and 9 σ from zero. The difference bewteen MP & MR is at 3 σ

1) Metallicity dependence: K-band



NIR bands are much less sensible to metallicity effects, but still we have a problem with solarmetallicities

2) Wesenheit relations W(BV) = V - Av/E(B-V) *(B-V)

PROS

Reddening free Linear over the entire period range <<u>Mimic a PLC relation</u>>> Theory marginally dependent on mixing-length & on Y

CONS

Uncertainties in the reddening law (Cardelli like) Is the reddening law universal ? Accurate mean B,V,I or JHK magnitudes

Reddening laws (MW + Magellanic Clouds)



Very-similar slopes



Benedict et al. (2007) Ngeow (2012) Storm et al. (2011a,b) Ripepi et al. (2012)

VI & NIR PW relations slopes & ZPs are minimally affected by metallicity

Lack of homogeneous Optical & NIR data sets!

RR Lyrae stars

RR Lyrae variables



Initial mass (MS): ~0.8-0.9 M_{sun}
 Mass (HB): ~0.6-0.8 M_{sun}

•Core He + Shell H burning

•[Fe/H] ~ -2.5 - 0.5 (Smith 2005)

•Old: >10 Gyr (GCs, halo, bulge)

RR Lyrae Stars observational properties

- Almost constant luminosity in the V-band, since their luminosity depends on the core mass (almost constant for the low-mass stars, due to degeneracy)
- Intrinsic brigthness V ~ 0.6 mag (some dependence on the metallicity)
 - Magically, a Period-Luminosity relation appears in the IJHK bands, due to bolometric correction effects, with some dependence on the metallicity



M3, APOD, 2004 October 12

Effect of the bolometric correction when viewing the HB



The RR Lyrae K-band Period-Luminosity relation

- In the optical bands we observe a horizontal distribution (wow, the Horizontal Branch!), since the luminosity level is set by the mass of the core. The V-band nicely follows the peak of the BB curve, according to Wien
 - In the near-infrared things go wild, since in the K-band RRLs are on their Rayleigh tail \rightarrow the bolometric correction is the dominant effect



Credits: C. Buil



The trick is that, moving to cooler temperatures:

The bolometric correction steadily decreases from hotter to cooler RRLs Hence RRLs become brighter (in the Kband) as they become cooler Periods become longer with decreasing temperatures $M_{K} = -0.766 - 2.071 \log P + 0.167 [Fe/H]$



 $\log P^{F} = 11.066(\pm 0.002) + 0.832 \log L - 0.650 \log M - 3.363 \log T_{e}$

Bono et al. 1997

Why NIR is better than optical?



 $Mv(RR) = \alpha + \beta [Fe/H]$

Affected by evolutionary effects!



Why NIR is better than optical?

In the B-band the hottest are the brightest!!

In the NIR the coolest are the brightest!!



PL/PLC in RR Lyrae & Cepheids

In Cepheids the PL/PLC is a direct consequence of the ML relation \rightarrow more massive stars are, at fixed Teff, brighter

 \rightarrow lower gravities \rightarrow longer periods \rightarrow optical/NIR

The difference in mass for RR Lyrae stars is at most of the order of 20%. The PL/PLC is the Consequence of the BC \rightarrow

This is the reason why it shows up with R/I-band




Coppola, Dall'Ora + (2011)

M4 a new spin on GC distance scale



Selected optical/NIR light curves

Stetson et al. (2014)



M4 a new spin on GC distance scale





M4 a new spin on GC distance scale



New accurate M4 distances Spitzer data (Neeley et al. 2015, 2017)



M4 DM measure

TABLE 1 True distance moduli and reddenings for M4 available in the literature.				
μ^{a} mag	$R_V^{\rm b}$ mag	E(B-V) ^c mag	Ref. ^d	Notes ^e
11.28 ± 0.06 11.18 ± 0.18 11.19 ± 0.01 11.22 ± 0.11 11.28 ± 0.06 11.48 11.18 ± 0.18 11.30 ± 0.05	3.62±0.07 3.8 4 4 3.8 3.8 3.8 3.62±0.07	0.37±0.01 0.34±0.03 0.37±0.01 0.37 0.32 0.33±0.01 0.399±0.010	H12 P95 LJ DL L90 B09 H04 K13	$(1) \\ (2) \\ (3) \\ (4) \\ (5) \\ (6) \\ (7) \\ (8) $
11.37 ± 0.08			B03	(9)

^aTrue distance modulus and its error when estimated by the authors.

^bThe ratio between absolute and selective extinction. ^cMean reddening.

^dReferences: H12, Hendricks et al. (2012); P95: Peterson et al. (1995); LJ: Liu& Janes (1990b); DL: Dixon & Longmore (1993); L90: Longmore et al. (1990); B09: Bedin et al. (2009); H04: Hansen et al. (2004); K13: Kaluzny et al. (2013); B03: Bono et al. (2003).

Braga, Dall'Ora et al. (2015)

Agreement with literature

 $DM_{(PLZ-Glob)} = 11.296 \pm 0.003 \pm 0.026$

 $DM_{(PWZ-Glob)}$ =11.267±0.011±0.035

Without optical bands...

$$DM_{(PLZ-Glob)} = 11.282 \pm 0.003 \pm 0.015$$

 $DM_{(PWZ-Glob)} = 11.267 \pm 0.012 \pm 0.019$

What is the slope of the PLK relation?



Playing with E-ELT

Why we want to use RRLs to measure distances with E-ELT?

All in all, we would go local, and not cosmological

The reasons are:

RRLs Gaia distances → sound calibration of the PLK relation:
 anchor the Cepheids distances

distances for early-type structures

MICADO expected performances tell us that we can reach K ~ 29 mag with one hour integration

In principle, we could explore up to $\mu \sim 29.5$ mag (~ 25 Mly)

But...

Remember that we need opticalbased ephemerids (HST)

RRLs have been reported in the optical up to the Sculptor Group (~ 6.2 Mly, Yang+, 2014)



Can we go farther than the optical limit?

The PLK relation is basically due to the bolometric correction, that is *intrinsically* a temperatureluminosity relation This means that we can adopt synthetic HB

adopt synthetic HB and pick up the observed bona-fide variable stars in the expected Instability Strip...



Cassisi et al. 2004



Beaton + (2016) \rightarrow An independent approach to the extragalactic distance scale: RR Lyrae + tip RGB

Tip of the Red Giant Branch

Same evolutionary channel of RR Lyrae stars: e-degenerate Helium core affected by thermal neutrinos!!!

Therefore, the luminosity is roughly the same, with populations effects depending on the metallicity

TRGB is brighter than RR Lyrae, and can be observed at larger distances.

Moreover, it does not need time-series observations to be detected

 $M_I^{\mathrm{TRGB}} \sim -4.1 \pm 0.1$

$$M_K^{TRGB} = -6.92 - 0.62 [Fe/H]$$

Tip of the Red Giant Branch



Example of TRGB detection in NGC 4258

A Check-Point

→ Facing a golden age for constraining systematics young vs old standard candles

→ Environmental effects: complete census across Loçal Group and Local Volume galaxies

 \rightarrow Spectroscopic characterization

→Change in the paradigm: from observing facilities to experiment driven

Core-Collapse Supernovae



What are the limits of physical explosions and transients? Can we use cosmological distance indicators other than Ia SNe? Credits: S. Smartt

A quick reminder

- SNe are primarily classified on the basis of their spectra:
 - Type I \rightarrow no Hydrogen
 - Ia \rightarrow strong Silicon
 - Ib → strong Helium (but a little Hydrogen)
 - Ic \rightarrow no Helium, weak Silicon
- Type II \rightarrow yes Hydrogen



Phenomenology of IIP SNe

- Strong Hydrogen
 lines --> Type II
 classification
- A long plateau in their lightcurve
- A sharp fall
- A radioactive tail



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Mesured features of IIP SNe

- The duration of the plateau is usually of the order of ~100 days, ranging between 80 and 120 days
- The initial velocity of the ejecta is of the order of 1-2 x 10^4 km/s
- The initial temperature is of the order of 1-2 x 10^4 K
- Peak luminosities commonly range between Mv = -15.5 and Mv = -18.5 mag --> how can we use them as distance indicators?



Anderson et al. 2014

A few crucial points



In a Type IIP supernova, the position of the photosphere corresponds to where hydrogen recombination is taking place. Since the temperature of recombination is constant, as the supernova expands and cools, the photosphere receeds in mass and a plateau is created in the light The length of the plateau is dependent on the depth of the hydrogen envelope The expansion is **homologous** --> the velocity is proportional to the radius

The Standardized Candle Method (SCM)

A recasting of the EPM or of the Baade-Wesselink relation

$$L = 4\pi v_{\rm ph}^2 t^2 \zeta^2 T_{\rm ph}^4$$



Hamuy & Pinto 2002

Why does the SCM exist?

A higher luminosity implies a larger hydrogen recombination front

... but it also implies a higher photospheric velocity (homologous expansion)

 $v_{\rm sn} \approx (2E/M_{\rm ej})^{1/2}$

 $L_p = 4\pi R^2 \sigma T_{\rm I}^4$



Theoretical Predictions



Kasen & Woosley 2009

But... can we really measure distant IIP SNe?



But... what does SCM really add?

Strictly speaking, this is not an independent calibration of the SN Ia distance scale

But it can be pushed far away, up to cosmological distances

Therefore, it can be used as healthy check of the SNe Ia results



Poznanski et al. 2009

But... what does SCM really add?



Current Calibrations

$$I_p - A_I + 5.820(\pm 0.764) \log\left(\frac{v_p}{5000}\right)$$

= 5 log (cz) - 1.797(±0.103).

Hamuy & Pinto 2002 rms = 0.29 mag 8 SNe, heliocentric corrected redshifts,
 "color" extinction, adopted H0 = 65 km/s/Mpc

$$M_I = -\alpha \log_{10}(V_{\text{Fe II}}/5000) - 1.36[(V - I) - (V - I)_0] + M_{I_0}$$

rms = 0.26 mag

$$M_I = M_{I_0} - \alpha \log_{10}(v_{\text{Fe II}}/5000) + R_I \left[(V - I) - (V - I)_0 \right]$$
rms = 0.22 mag

 $m + \alpha \log (\upsilon_{\text{FeII}}/5000) - \beta(V-I) = 5 \log cz + zp.$

rms = 0.19 mag

Nugent et al. $2006 \rightarrow 24$ SNe with mixed distances, mainly based on z-SBF, and "color" extinction at day 50, with a fixed extinction law, *adopted* H0 = 68

Poznanski et al. 2009, 19 SNe z-SBF distances, extinction law as a free parameter, *adopted* Ho = 70

Olivares et al. 2010, 37 nearby SNe, heliocentric corrected redshifts, Cepheids calibrated, "custom" reference phase, local extinction law

A simple exercise

What happens if we put in the HP diagram four **nearby** IIPs, studied with a homogenous data reduction and with a homogenous treatment of the reddening of the host galaxy?

🍎 s

SN 2012aw (M95), Dall'Ora+14

SN 2012ec (NGC 1084), Barbarino, Dall'Ora+15

SN 2012A (NGC 3239), Tomasella+13

SN 2013ej (M74), Yuan+16



Again a simple exercise



The Role of E-ELT

To calibrate the SCM with Primary Distance Indicators we need to increase the number of host galaxies where IIP SNe have exploded, and also we have detected Cepheids and TRGB

Currently, only a very few objects are available

This means that we can either:

- Wait for other IIP SNe to explode in nearby galaxies...
- Or... observe Cepheids and TRGB in more distant galaxies (yes, E-ELT), where IIP SNe have been already exploded...

The Role of E-ELT

- However, E-ELT will observe in the NIR bands
- Can we apply the SCM in the NIR?...



Maguire et al. 2010

Why is SCM appealing?

SCM is a fast and simple method, with a good accuracy (10-15%), with a known physics behind

- It can be used up to cosmological distances and it can provide a healthy check of the Ia SNe calibration
- IIP SNe rates could provide a higher statistics than Ia SNe (Hopkins & Beacon 2006)
- They are a homogeneous sample with respect to the age of the stellar population
- BUT.... we still lack a calibration on Primary Distance Indicators (Cepheids, TRGB)...

Another application: SLSNe as standardizable candles



Inserra & Smartt 2014, ApJ, 796, 18

- Super-luminous SNe : hot, UV bright sources, $M_{UV} \sim -22$ mag
- Peak magnitude is (potentially) standardizable to ± 0.2 mag
- Already shown to be exclusively produced in low metallicity dwarf galaxies $(Z < 0.2Z_{\odot})$
- Ideal high redshift probes : cosmology, star formation, beyond z > 6 with LSST, JWST, VLT and E-ELT

Credits: S. Smartt

What's cooking?

LSST: a new spin

- G. Bono, M. Dall'Ora, G. Fiorentino, S. Marinoni, D. Magurno
- PI-ship supported by INAF


Basic idea behind LSST: a uniform sky survey

- 90% of time will be spent on a uniform survey: every 3-4 nights, the whole observable sky will be scanned twice per night
- after 10 years, half of the sky will be imaged about 1000 times (in 6 bandpasses, ugrizy): a digital color movie of the sky
- ~100 PB of data: about a billion 16 Mpix images, enabling measurements for 40 billion objects!



0 50 100 150 200 acquired number of visits: r LSST in one sentence: An optical/near-IR survey of half the sky in ugrizy bands to r~27.5 (36 nJy) based on 825 visits over a 10year period: deep wide fast.

Left: a 10-year simulation of LSST survey: the number of visits in the r band (Aitoff projection of eq. coordinates)

LSST: the numbers

Single epoch (5σ) measurements u=23.9 -- g=25.0 -- r=24.7 -- i=24.0 -- z=23.3 - y=22.1

Final mean magnitudes u=26.1 -- g=27.4 -- r=27.5 -- i=26.8 -- z=26.1 - y=24.9

Number of visits x band u=56 - g=80 - r=184 - i=184 -- z=160 - y=160 Median number of visits x field in all bands → 824

Two 15 sec exposures x visit

90% survey + 10% special programs



E-ELT Integral Field Spectrograph: HARMONI



33,000 spaxels per exposure!

LSST & ELT at least five years in common Plus SCAO + LTAO

WAVELENGTH RANGES & RESOLVING POWERS

Bands	R
V+R, I+z+J, H+K	~4000
V, R, I+z, J, H, K	~10000
Z, J_high, H_high, K_high	~20000

- Sector Strategy St
 - Re-assessing the need for high spectral resolving power at visible wavelengths (< 0.8 micron)</p>

NIRSPEC@JWST

FoV ~3' X 3' for MOS

Slit width ~200 mas

Slits

Micro Shutter Array Fixed slits IFU (3"" X 3")

Spectral

Resolution R~100 \rightarrow 0.7 -- 5 µm (single prism) R~1000 \rightarrow 1 -- 5 µm (3 gratings) R~2700 \rightarrow 1 -- 5 µm (3 gratings) R=100 \rightarrow t_exp ~ 10,000 sec point source continuum at 3 µm

S/N=10 is AB~26 mag

Synergies between JWST & ELTs

High-z : JWST, LSST and E-ELT



NIRSPEC Surveys $H_{AB} > 25$





LSSTFeed for ELT spectraSurveysELT + HARMONI $Z_{AB} > 25$ (R~500)SLSNe at z = 6-10

<u>Credits: S. Smartt</u>

Thank you

"Mirar el Cielo es un sentimiento"

