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SPECIFICATION

ISO/PAS
12835

First edition
2013-12-15

Qualification of casing connections for thermal wells

Qualification des raccordements de boîtiers pour les puits thermiques

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Reference number
ISO/PAS 12835:2013(E)

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Published in Switzerland

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT) see the following URL: Foreword - Supplementary information

The committee responsible for this document is ISO/TC 67, *Materials, equipment and offshore structures for petroleum, petrochemical and natural gas industries*, Subcommittee SC 5, *Casing, tubing and drill pipe*.

Introduction

This Thermal Well Casing Connection Evaluation Protocol (TWCCEP) provides procedures for assessment and thereby enables evaluation of suitability of threaded casing connections for service in intermediate or production casing strings of thermal recovery wells. The TWCCEP defines such wells as those with operating temperatures that cyclically vary between minimum values appreciably below 180°C and maximum values that range from 180°C to 350°C, in which the casing string is cemented and the primary axial loading is strain-based.

Throughout this document, a casing connection subject to evaluation is referred to as candidate connection. A candidate connection denotes a product with unique design features and production specifications for size, weight, and component materials (including pin, box, and interfacial components).

The TWCCEP assesses the candidate connection's galling resistance, structural integrity and sealability under loads typical for connection assembly and thermal-well service. The TWCCEP does not address impacts of external pressure, incomplete lateral pipe support, rotational fatigue, formation-induced shear, or environmentally-induced corrosion or cracking.

The TWCCEP's evaluation procedure includes analysis and full-scale testing. In the analysis, worst-case combinations of the connection geometry and material properties are determined and specifications for test specimens are derived. In the full-scale tests, those specimens are subjected to loading representative of thermal well operations. While the TWCCEP aims to enable a statistically significant full-scale test, it does not demand a rigorous check of a true statistical placement of the tested sample responses relative to field connection performance, and thus inherently assumes that the test specimens are representative of subsequent field connections. For this reason, only connections with the same design parameters as the candidate connection should be considered representative of the connection assessed under this protocol.

The extensive effort involved in replicating thermal well field conditions in a laboratory environment limits the extent of physical testing that can reasonably be undertaken in an evaluation program. This protocol balances technical rigor and practicality to provide a baseline level of confidence in the candidate connection's performance. Connection users should consider the scope of this evaluation and appropriate additions to address operation-specific conditions. Successful field use of a connection meeting the requirements of this protocol does not preclude an operator's need to employ appropriate product quality assurance measures and field operating practices.

The TWCCEP is the culmination of a thorough review of factors contributing to performance of casing connections in thermal well applications. This protocol has been developed using input from operators' descriptions of field practices, manufacturers' feedback on connection design and production, available literature, knowledge of past connection qualification programs, and additional analytical and experimental work performed in support of the protocol development. The TWCCEP is intended to be maintained and refined as new findings surface.

Qualification of casing connections for thermal wells

1 Scope

ISO/PAS 12835 is intended for assessment of casing connections for those field applications in which the design of the casing-connection system is strain-based, and in which primary axial loading is on the casing-connection system driven by constrained thermal expansion, and in which that primary loading exceeds the casing-connection system's yield envelope. Consequently, ISO/PAS 12835 should be considered as a protocol that is complementary to ISO 13679, which applies to classic elastic-design applications.

ISO/PAS 12835 describes the structure of the Thermal Well Casing Connection Evaluation Protocol (TWCCEP) and provides guidelines for its use by new or repeat TWCCEP users, whose familiarity with the TWCCEP provisions might vary. [Clause 6](#) describes fundamental assumptions adopted in the TWCCEP.

NOTE The term "user" refers to a party that uses the TWCCEP in a connection evaluation program. That party might or might not be the same party as a later user of the evaluated connection in a field application.

2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the cited edition applies. For undated references, the latest editions of the reference documents apply.

ASTM A370, *Standard Test Methods and Definitions for Mechanical Testing of Steel Products*

ASTM E8, *Standard Test Methods for Tension Testing of Metallic Materials*

ASTM E21, *Standard Test Methods for Elevated-Temperature Tension Tests of Metallic Materials*

ASTM E831-06, *Linear Thermal Expansion of Solid Materials by Thermomechanical Analysis*

ISO 9001, *Quality management systems — Requirements*

ISO 11960, *Petroleum and natural gas industries — Steel pipe for use as casing and tubing for wells¹⁾*

ISO 13679:2002, *Petroleum and natural gas industries — Procedures for testing casing and tubing connections²⁾*

3 Terms and definitions

For the purpose of this document, the following terms and definitions apply.

3.1

ambient temperature

ambient temperature in the facility where a physical testing task is executed

1) Based on API Specification 5CT.

2) Based on API Specification 5C5.

3.2

application severity level

connection loading specifications assumed to be representative for a range of operational conditions, which determine the scope of analysis and testing required by the evaluation procedure (3.15) for those operational conditions

3.3

assigner

party that commissions an evaluation program (3.16)

3.4

average string strain

average axial strain along the controlled elongation interval (3.13) of a specimen string (3.37)

3.5

bend test specimens

subset of candidate connection specimens (3.8) subjected to the optional bending evaluation (3.6) per the TWCCEP evaluation procedure (3.15)

3.6

bending evaluation

analysis and physical testing conducted to determine a candidate connection's (3.7) sensitivity to casing curvature

3.7

candidate connection

casing connection product that is being evaluated by the TWCCEP, and is uniquely defined by its design features and production specifications with respect to size, weight, and component materials

3.8

candidate connection specimens

a set of connection specimens (3.11, 3.12) that is representative of a candidate connection's (3.7) design and features, and is provided for an evaluation program (3.15) of that candidate connection (3.7)

3.9

casing pup

short piece of casing pipe cut from a mother joint

3.10

connection

single design-specific assembly of pin and box and interfacial component(s)

3.11

connection specimen (for threaded and coupled connections)

two connections consisting of a single coupling and two casing pups (3.9) with pin ends joined by that coupling

3.12

connection specimen (for integral connections)

one connection consisting of one casing pup (3.9) with a box end and one casing pup (3.9) with a pin end

3.13

controlled elongation interval

portion of a specimen string (3.37), along which the elongation is measured and controlled

3.14

effective string length

portion of the total length of a specimen string (3.37) that is assumed to deform appreciably under mechanical forces in the thermal cycle test (3.44)

3.15**evaluation procedure**

set of analytical and testing tasks required by the TWCCEP to assess performance of the candidate connection specimens (3.8)

3.16**evaluation program**

execution of the TWCCEP to assess performance of a candidate connection (3.7)

3.17**evaluation report**

collectively, all documents prepared by an evaluator (3.18), according to applicable TWCCEP reporting requirements, that describe an evaluation program's (3.16) execution history and results

3.18**evaluator**

party that performs analytical and testing tasks required by an evaluation procedure (3.15)

3.19**excluded connection**

connection (3.10) that has been evaluated in a TWCCEP full-scale test but whose performance has been excluded from comparison with threshold performance requirements (3.45)

3.20**galling**

cold welding of contacting material surfaces followed by tearing of metal during subsequent sliding

3.21**high cycle temperature**

targeted highest temperature in the thermal cycle test (3.44)

3.22**inspection report**

collectively, all documents prepared by an inspector (3.23), according to applicable TWCCEP reporting requirements, that describe compliance of the executed evaluation program (3.16) with TWCCEP requirements

3.23**inspector**

party that verifies compliance of the executed evaluation program (3.16) with requirements of the TWCCEP

3.24**interfacial component(s)**

design-specific component(s) of a connection (3.10) applied to the pin and box either during their manufacturing (e.g. coatings) or during the connection assembly (e.g. thread compound)

3.25**limit-strain specimens**

subset of candidate connection specimens (3.8) subjected to the limit-strain test (3.26) per the TWCCEP evaluation procedure (3.15)

3.26**limit-strain test**

tension test, to structural failure, of the limit-strain specimens (3.25)

3.27**low cycle temperature**

targeted lowest temperature in the thermal cycle test (3.44)

3.28

make-break specimens

subset of candidate connection specimens (3.8) subjected to multiple make-ups and break-outs per the TWCCEP evaluation procedure (3.15)

3.29

make-up support pin

pin component of candidate connection (3.7) with seal removed, used to support a coupling's open end during make-up and break-out of that coupling's opposite end

3.30

material coupon

cylindrical section of pipe from which material strip specimens (3.31) are cut

3.31

material strip specimen

longitudinal steel strip cut from a material coupon (3.30) and machined for use in mechanical property characterization tests

3.32

prior evaluation data

set of data acquired in a connection performance assessment carried out by analysis and/or physical tests prior to issuance of this protocol and/or according to a procedure/protocol different than the TWCCEP evaluation procedure (3.15)

3.33

program roles

collective reference to the roles of assigner (3.3), supplier (3.39), evaluator (3.18) and inspector (3.23)

3.34

repairable galling

galling that can be repaired according to a supplier's (3.39) field-repair procedure for a candidate connection (3.7)

3.35

severe galling

galling that cannot be repaired according to a supplier's (3.39) field-repair procedure for a candidate connection (3.7)

3.36

specimen

used in commentary and/or descriptive context, denotes a generic reference to a connection specimen (3.11, 3.12) or to a material strip specimen (3.31)

3.37

specimen string

collective reference to a single connection specimen (3.11, 3.12) and/or an in-series assembly of two or more connection specimens (3.11, 3.12) in a thermal cycle test (3.44)

3.38

substantially qualified party

person/company possessing technical skills and experience necessary to perform a task, as designated by the assigner (3.3) and the supplier (3.39)

3.39

supplier

party that manufactures a candidate connection (3.7)

3.40**tensile strain threshold**

tensile strain value that a connection specimen (3.11, 3.12) is expected to survive during a limit-strain test (3.26)

3.41**test specimen**

used in commentary and/or descriptive context, denotes a generic reference to a connection specimen (3.11, 3.12) that is provided for a full-scale test

3.42**thermal cycle**

used in commentary and/or descriptive context, denotes a temperature excursion from a low initial temperature to a high maximum temperature and back to the low initial temperature

3.43**thermal cycle specimens**

subset of candidate connection specimens (3.8) subjected to the thermal cycle test (3.44) per the TWCCP evaluation procedure (3.15)

3.44**thermal cycle test**

thermo-mechanical test of connection specimens (3.11, 3.12), in which several thermal cycles are applied between the low cycle temperature (3.27) and the high cycle temperature (3.21)

3.45**threshold performance requirements**

set of connection performance criteria that candidate connection specimens (3.8) must satisfy in order for a candidate connection (3.7) to be considered as having met TWCCP minimum performance requirements

4 Abbreviations, symbols and illustrations of selected definitions

4.1 Abbreviations

Terms defined in Table 1 denote abbreviations used for descriptive purposes.

Table 1 — List of abbreviations

ASL	application severity level
BF	fast box taper
BS	slow box taper
CSS	cyclic steam stimulation
CTE	coefficient of thermal expansion
FEA	finite element analysis
max.	maximum
min.	minimum
PF	fast pin taper
PS	slow pin taper
SAGD	steam assisted gravity drainage

TC	threaded-and-coupled
TWCCEP	thermal well casing connection evaluation protocol
TF(WGS)	final make-up torque for specimen with WGS configuration
TF(WGT)	final make-up torque for specimen with WGT configuration
TF(WSC-M)	final make-up torque for specimen with WSC configuration and multiple make-ups
TF(WSC-S)	final make-up torque for specimen with WSC configuration and single make-up
TF(WST-M)	final make-up torque for specimen with WST configuration and multiple make-ups
TF(WST-S)	final make-up torque for specimen with WST configuration and single make-up
WGS	worst-case tolerance combination for galling in seal
WGT	worst-case tolerance combination for galling in threads
WSC	worst-case tolerance combination for sealability in compression at high temperature
WST	worst-case tolerance combination for sealability in tension at low temperature

4.2 Symbols

Terms defined in [Table 2](#) denote variables, which depend on the selected application severity level (ASL) and other protocol options, procedural calculations, and interim results.

Table 2 — Symbols

CTE_a	average coefficient of thermal expansion
ρ_{MAX}	maximum test curvature
D	casing outside diameter
$\Delta\epsilon_{LL}$	strain increment for application in the limit-strain test
$\Delta\rho$	curvature increment
$ETTE_a$	average residual post-cycle strain
L_{CEI}	length of controlled elongation interval
L_p	unsupported pup length (pup length excluding make-up loss, i.e. pin-box overlaps at each end)
$LTTS$	lower-bound temperature strain increment
$SLCF$	strain-length compensating factor
SRI	temperature range strain increment
$SSP(T)$	saturated steam pressure at temperature T
t	casing wall thickness
T	temperature
T_{amb}	ambient temperature
T_{hc}	high cycle temperature

T_{lb}	lower-bound temperature for a given application severity level
T_{lc}	low cycle temperature
T_{ub}	upper-bound temperature for a given application severity level

4.3 Illustrations of selected definitions

[Figure 1](#) illustrates a connection specimen ([3.11](#), [3.12](#)). [Figure 1 a](#)) shows a connection specimen for a threaded-and-coupled (TC) connection ([3.11](#)), and [Figure 1 b](#)) shows a connection specimen for an integral connection ([3.12](#)). A threaded-and-coupled connection specimen consists of one coupling and two casing pups ([3.9](#)), and contains two connections (two leak paths). An integral connection specimen consists of one pin-end pup and one box-end pup, and contains one connection (one leak path).

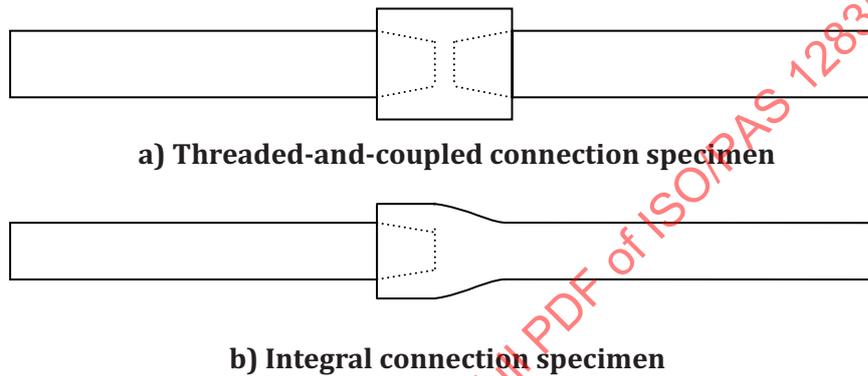


Figure 1 — Illustration of connection specimens

When full-scale testing is conducted on strings containing multiple connection specimens assembled in series, some casing pups are shared by two adjacent connection specimens (which might be either threaded and coupled or integral). Each such shared casing pup is considered to consist of two halves, with each half belonging to the connection specimen that includes the corresponding pin end or integral box end. [Figure 2](#) illustrates an example of a string assembly with four connection specimens. For consistency with TWCCEP requirements for a thermal cycle test ([3.44](#)), in which a four-specimen string ([3.37](#)) assembly may be used, the example in [Figure 2](#) shows Specimens 3, 4, 5, and 6. For threaded and coupled connection specimens, the two specimen leak paths can be distinguished by the specimen number and letters “A” and “B” referring to each specimen side.

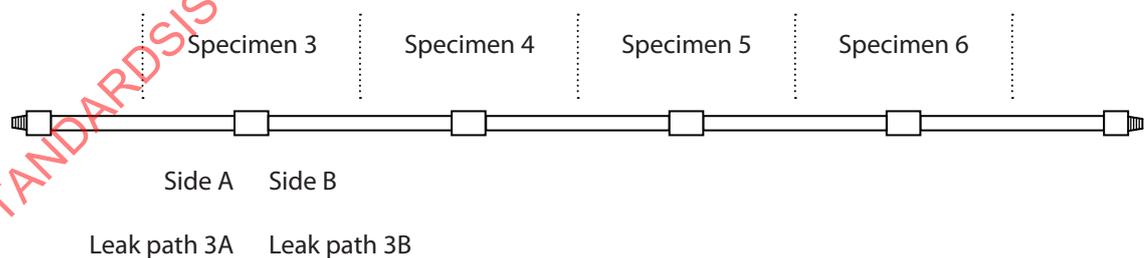


Figure 2 — Illustration of connection string assembly

5 Program flowchart

[Figure 3](#) illustrates five main components (blocks) of a TWCCEP program ([3.16](#)). A detailed description of the TWCCEP blocks and tasks is provided in [Clause 10](#).

General principles adopted for the TWCCEP evaluation procedure ([3.15](#)) are described in [Clause 6](#). It is strongly recommended that all users of this document and all parties responsible for a prospective use

of an assessed connection in a field application review [Clause 6](#) and become aware of the assumption basis and procedural requirements specified by TWCCEP for the assessment tasks and data reporting.

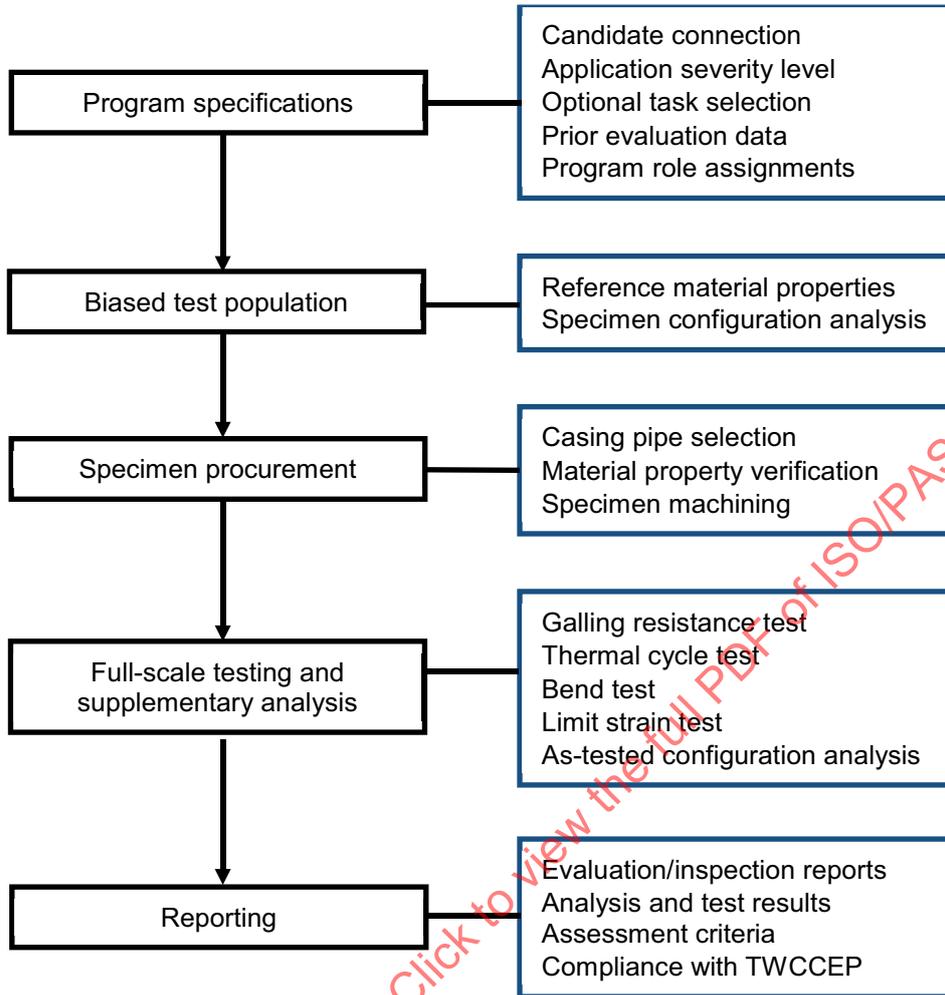


Figure 3 — TWCCEP flowchart

6 Overview and fundamental assumptions of TWCCEP

6.1 General

This Clause contains an overview of fundamental assumptions adopted for the TWCCEP, which are provided to facilitate understanding and interpretation of TWCCEP's provisions and procedural requirements specified in later Clauses of this document.

6.2 Main TWCCEP features

6.2.1 Purpose of TWCCEP

The TWCCEP provides procedures for assessing suitability of threaded casing connections for intermediate or production casing strings for thermal recovery wells. Conducting an assessment of a candidate connection according to the TWCCEP provides data that can be interpreted by a user to complete evaluation of the candidate connection.

6.2.2 Applicability to service conditions

The TWCCEP applies to those field applications in which operational temperatures oscillate between a cold level, appreciably below 180°C, and a hot level, above 180°C, in which casing deformation is primarily driven by thermo-mechanical strain resulting from the above temperature excursions, and in which the casing body might or might not cyclically yield under the corresponding strain-driven loads.

Specifically, the TWCCEP applies to two thermal-recovery applications: Steam Assisted Gravity Drainage (SAGD) and Cyclic Steam Stimulation (CSS), in which thermal expansion of the casing string is constrained by cementing. The TWCCEP might also be used for qualifying connections for other extreme-service wells in which tubular undergo full-body yielding and for which deformation-tolerant design is desired; for example, wells in compacting reservoirs, steam-drive wells, geothermal wells, or some high-pressure, high-temperature wells.

6.2.3 Rationale for TWCCEP development

Lack of a standard connection evaluation procedure for thermal-well applications was the main rationale for developing the TWCCEP.

Loading of intermediate casing connections in thermally stimulated wells is very severe and of unique character. Prior to issuance of the TWCCEP, no other connection evaluation procedure had been adopted as an industry standard for those loading conditions. In particular, ISO 13679 provides procedures for evaluating casing and tubing connections only for elastic-design applications, in which the tubular-body stress state is assumed to remain elastic, and in which maximum operational temperatures do not generally exceed 180°C. Despite these fundamental differences, several similarities exist between the TWCCEP and ISO 13679. Where practical, such similarities are referred to in this document.

6.2.4 Subject of evaluation

A casing connection product subjected to an evaluation program is referred to as a candidate connection (3.7). A candidate connection denotes a product with unique design features and production specifications for size, weight, and component materials (including pin, box, and interfacial components (3.24)).

In general, one or more candidate connections can be assessed in an evaluation program. For simplicity, this document refers to a single candidate connection as a subject of evaluation. If two or more candidate connections are included in a single evaluation program, then all of the TWCCEP provisions apply to each candidate connection separately.

6.2.5 Application severity levels

The severity of field operating conditions varies. The TWCCEP distinguishes multiple ASLs, uniquely defined in terms of maximum operating temperature (see 9.3).

Temperature has been recognized as the primary variable influencing severity of pipe thermo-mechanical loading and the connection response to that loading, including sealability and structural performance. The following arguments support this assumption:

- constrained thermal expansion of cemented casing heated to the maximum operating temperature leads to pipe and/or connection yielding. The magnitude of the axial loads generated during heating (and also subsequent cooling during a well intervention), as well as the degree of post-yield deformation, strongly depend on the applied temperature range;
- in field service, applied internal pressures typically follow the saturated-steam relationship with temperature;
- properties of casing pipe and connection materials vary with temperature – the material yield strength typically decreases with temperature, and creep and relaxation effects become more pronounced at elevated temperatures;

- elevated temperatures affect properties of thread compounds (dopes), and thus influence the role of the dope in premium seal activation. Such temperatures might also affect properties of some coatings used for dopeless connections. Higher temperatures are typically associated with faster degradation of dopes and coatings.
- the ASL is selected at the onset of each evaluation program. Some aspects of the TWCCEP evaluation procedure, such as severity of loading applied in numerical modelling and physical tests, depend on the selected ASL. TWCCEP assessment criteria are independent of the selected ASL.

6.3 Assessment philosophy and principles

6.3.1 Fundamental principles

The TWCCEP fundamental assessment philosophy is to:

- distinguish between those connection types that are suitable for thermal well service and those that are not;
- acquire key connection performance data for comparison with adopted minimum performance requirements, and also auxiliary performance data for determination of connection service boundaries;
- be practical to execute by analytical methods and laboratory testing.

Based on the above philosophy, the TWCCEP assumes the following principles for the evaluation basis:

- Principle 1 The evaluation procedure should be conservative with respect to:
- a) candidate connection samples: test specimen configurations should be chosen to have the least-favourable characteristics possible within production manufacturing ranges;
 - b) loading: evaluation procedure should employ the most severe loading that is representative of cited field conditions.
- Principle 2 Given that field conditions vary, the evaluation procedure should provide options to tailor the evaluation scope to anticipated operational conditions.
- Principle 3 The evaluation procedure should make the best use of available analytical and physical-testing tools.
- Principle 4 The evaluation procedure should measure a candidate connection's performance with respect to those performance indicators that are considered critical for reliability in field service.
- Principle 5 Assessment criteria should be chosen according to reasonable field-performance expectations. Assessment criteria should refer only to results of full-scale tests.
- Principle 6 Where practical, auxiliary data should be collected to assess connection performance boundaries and safety margins with respect to cited service conditions.
- Principle 7 Where possible and practical, data acquired in prior evaluations can be used, and the evaluation program scope can be reduced accordingly.
- Principle 8 Execution of an evaluation program does not require the manufacturer of a candidate connection to reveal confidential connection design information beyond a level that enables third-party inspection.
- Principle 9 Results of every evaluation program should be interpreted in the context of the completed evaluation scope and anticipated service conditions.
- Principle 10 Perception of conflict of interest in executing an evaluation program should be avoided.

Each principle listed above is further described in the following Clauses. Discussion of some principles is also illustrated by reference to [Figure 6](#) and [Table 5](#) in [10.1](#), which describe the tasks of the TWCCEP evaluation procedure.

6.3.2 Conservative evaluation procedure

The TWCCEP is based on the premise that the evaluation procedure should verify the adequacy of a candidate connection's performance under worst-case combinations of factors that affect its behaviour, including connection geometry, manufacturing tolerances, material properties, assembly, and operational loading. Principle 1 ([6.3.1](#)) is implemented by the following steps:

- a) Determine the worst-case combinations of manufacturing and assembly variables for the candidate connection, and treat those combinations as specifications for a biased test population.
- b) Evaluate the biased test population under the established representative loading.
- c) Compare the measured performance of the biased test population to adopted performance requirements. Record acceptance if those requirements are met, or failure if those requirements are not met.
- d) Assume that any production series of the candidate connection will perform equally well or better in relevant field service than the evaluated, biased test population.

Step a) above is referred to as the front-end determination of the biased test population. Steps b) and c) are performed in the evaluation program by full-scale testing and supplementary analyses. Step d) is executed based on the acquired evaluation results.

6.3.3 Mandatory and optional tasks

The TWCCEP evaluation procedure contains mandatory tasks and optional tasks, which allows the evaluation scope to be tailored to specific operational conditions (per Principle 2 in [6.3.1](#)):

- mandatory tasks are considered critical for evaluation of connections for all applications to which the TWCCEP applies. Completion of all mandatory tasks is required in every evaluation program;
- optional tasks are those tasks that should be chosen so that the evaluation program provides results most relevant for the cited operational conditions. It is mandatory to consider all program options, consciously select an optional task scope suitable for each evaluation program, and then execute the selected options accordingly. It is not mandatory to execute those optional tasks that have not been selected.

TWCCEP mandatory and optional tasks are listed in [Figure 6](#) and [Table 5](#). Examples of optional tasks are: seal taper analysis, bending evaluation ([3.6](#)), and seepage measurement in the limit-strain test ([3.26](#)).

Since review of the optional task menu is mandatory, descriptions of all mandatory tasks and optional tasks are kept together in the main body of this document, so that the rationale for each option is presented in a logical order and subsequent selection decisions are facilitated.

In some optional tasks, the TWCCEP provides specific directions relative to the task scope and/or procedures. In other program options, the TWCCEP provides only general recommendations that the discussed issues should be addressed in the context of the intended application.

In some TWCCEP programs, a candidate connection might be evaluated at a time when future use of the connection is unknown. When the candidate connection is later contemplated for use in a specific application, the prospective user of the candidate connection should:

- carefully review the details of the executed evaluation program, including the selected program options;
- determine if the executed scope provides an adequate level of evaluation for the intended application;

- if need be, consider executing additional evaluation tasks according to other program options that were not selected previously.

6.3.4 Use of analysis and physical testing

Per Principle 3 (6.3.1), the TWCCEP employs both analysis and physical testing. The overall scope of the prescribed analysis and physical-testing includes both mandatory and optional tasks, as described in Clause 6.3.3. Figure 6 summarizes all analytical and testing tasks of the TWCCEP evaluation procedure. Table 5 indicates the categories of data acquired in each task, as described in 6.3.7.

Analysis is an efficient and effective tool to examine connection sensitivity to design and operational variables. In general, an analytical task can involve a combination of engineering derivations based on closed-form solutions and numerical analysis based on the finite element method. Those formulations facilitate parametric studies, in which connection sensitivities might be readily assessed with respect to many – but not all – manufacturing and loading variables.

In the TWCCEP, analysis is employed to select the biased test population, guide subsequent program execution (see 6.3.2), and acquire auxiliary data on candidate connection performance boundaries (see 6.3.7). Some analytical results may also be used to specify additional testing to verify candidate connection performance under application-specific conditions that are not simulated in the mandatory tests. No analytical results are compared to TWCCEP threshold performance requirements (3.45).

Physical full-scale tests are considered to be all inclusive verification of connection performance, because they account for all design variables i.e. both the variables that are controlled in the connection manufacturing process and the “black-box” variables that are not explicitly controlled, such as pin and box waviness. In preparation of the test specimens (3.41), the black-box variables are assumed to be at values representative of production connections. It is recognized that this assumption might not always be conservative because the test samples are prepared according to custom specifications and manufactured outside of standard production runs. For example, the test specimens might have a higher degree of circumferential uniformity than production connections.

Results obtained in the physical testing fall into several categories (see 6.3.7). For example, some results from mandatory tests are key performance indicators. Those are the only results that are compared with TWCCEP performance requirements (see 6.3.5 and 6.3.6), to determine whether or not the candidate connection performance meets the requirements of this protocol. Other results from mandatory tests and all results from optional tests are considered to be auxiliary performance data.

6.3.5 Performance measures

The TWCCEP assesses the following connection performance measures:

- galling resistance;
- structural integrity;
- sealability.

The TWCCEP excludes assessment of a connection resistance to environmental corrosion and cracking.

The above choice of performance measures results from the TWCCEP’s focus on connection response to assembly and thermo-mechanical loading. While environmentally-induced corrosion and cracking is a significant loading component active in thermal wells, those loading mechanisms are excluded from consideration in the TWCCEP evaluation until synergies between thermo-mechanical and environmental loading are better understood.

6.3.6 Assessment criteria

6.3.10 provides guidelines for interpreting results acquired in a TWCCEP evaluation program in the context of a specific field application. To facilitate this interpretation, the TWCCEP adopts reference performance requirements, which are referred to as threshold performance requirements (3.45). A

candidate connection is considered to have met the performance requirements of this protocol if the candidate connection's performance meets or exceeds all applicable threshold performance requirements. Only results of full-scale tests are compared with the threshold performance requirements.

The following threshold performance requirements are adopted for the mandatory physical tests:

- no evidence of severe (irreparable) galling (3.20) in the galling resistance test;
- lack of structural failure in any combined-loading test;
- seepage rates below adopted threshold rates in sealability tests.

6.5.3 provides guidance for seepage threshold rates to be used in sealability tests.

The TWCCEP also recommends assessment criteria for the optional physical tests, which refer to structural strength and sealability. Use of those assessment criteria is optional at the assigner's (3.3) discretion. It can be expected that in some evaluation programs alternative assessment criteria for the optional tasks might be adopted by agreement between the assigner (3.3), the supplier (3.39) and the evaluator (3.18). The TWCCEP does not provide any provisions for such agreements, but requires that the agreed assessment criteria be documented in the evaluation report (3.17).

6.3.7 Task outcomes — data categories

In order to implement Principles 1, 4, and 6 (6.3.1), the TWCCEP recognizes the following categories of data acquired in various tasks:

- input for further tasks. This data type is acquired in tasks that determine the completion scope of subsequent tasks (e.g. determination of the biased test population);
- key performance measures. These results are compared with TWCCEP acceptance criteria to determine whether or not the candidate connection meets, or does not meet, the TWCCEP's threshold performance requirements;
- auxiliary performance data. These results also assess connection performance, but are not graded against any acceptance criteria.

Acquiring data in the first two categories is mandatory in all TWCCEP tasks. Acquiring data in the third category is mandatory in some tasks and optional in some other tasks (see Table 5). The TWCCEP recommends that auxiliary data should be collected whenever practical, because that data provides valuable information for prospective connection users. This recommendation is particularly relevant for new connection designs, or those connections for which little prior evaluation data (3.32) are available.

6.3.8 Prior evaluation data

Data acquired in a connection assessment program executed prior to a TWCCEP evaluation program, referred to as "Prior Evaluation Data," may be used in lieu of some or all analysis or testing required by the TWCCEP evaluation program if it is demonstrated that the scope, procedures, execution history, and documentation that were employed to acquire and record prior evaluation data, all meet or exceed the corresponding requirements of the TWCCEP (8.5).

The spirit of this provision is to enable use of complete or partial results from analysis and/or full-scale tests performed according to other proprietary or standard protocols. For example, historic evaluations performed by some operators in Alberta, Canada; or assessments performed in-house by connection suppliers; or from material characterization tests done on various OCTG tubulars.

6.3.9 Treatment of confidential design information

It is recognized that connection design information is proprietary by nature, and that connection manufacturers might not want to reveal some of that information, e.g. machining drawings, to any other party. The TWCCEP is structured so that it can be executed with or without exchange of candidate

connection drawings among the parties involved in the evaluation tasks (see 7.2). The possible extent of third party inspection will be influenced by the extent to which the connection design information is revealed.

6.3.10 Interpretation of TWCCEP results

The TWCCEP does not provide a single pass-fail “certificate”. Instead, the TWCCEP requires that a comprehensive evaluation report be prepared for each evaluation program, and that the report be available to a prospective user of the evaluated connection.

From the user perspective, meeting TWCCEP performance requirements should be considered as an indication of conformance to adopted performance standards. Those results should be interpreted with due consideration given to the scope of the completed evaluation program and prospective field service requirements.

Since the TWCCEP cannot anticipate all facets of all field applications, the ultimate judgment on qualifying a connection for use in a given application rests with the connection user. The user must decide if results of an evaluation program indicate that the evaluated candidate connection is suitable for the intended application.

Having optional tasks in the TWCCEP structure, per Principle 2 (see 6.3.1), is desirable because it allows the TWCCEP procedure to be tailored to specific operational conditions and qualification requirements. As a consequence, comparing data from various programs demands a thorough review because selections of program options and optional tasks might vary. The demand for thoroughness is a positive consequence, because comparison of results among various TWCCEP programs should always be done consciously and cautiously.

6.3.11 Avoiding perception of conflict of interest

To benefit connection manufacturers and users, the TWCCEP specifies roles and responsibilities of various parties involved in the evaluation program so that the potential for perception of a conflict of interest is minimized. The party that commissions the evaluation program is referred to as the assigner; the party that manufactures a candidate connection is referred to as the supplier; the party that carries out the evaluation program is referred to as the evaluator; and the party that verifies compliance with this protocol is referred to as the inspector (3.23). At least two independent parties must be involved in all major evaluation tasks.

6.4 Evaluation variables

6.4.1 Connection loading

The TWCCEP evaluation procedure (including both mandatory and optional tasks) accounts for the following external loads:

- make-up torque;
- temperature;
- internal pressure;
- post-yield axial tension and compression generated by constrained thermal expansion;
- curvature-induced bending.

The TWCCEP does not address impacts of external pressure, fatigue, formation-induced shear (e.g. from geo-mechanical loads), cement voids or environmentally-induced corrosion or cracking.

6.4.2 Impacts of contributing variables

As a consequence of Principle 1 (6.3.1), one of the main tasks in the TWCCEP development process was to assess impacts of design and loading variables contributing to connection performance in thermal well service. The first objective of the assessment was to distinguish between variables that exert major and minor impacts, so that the major-impact variables could be considered when selecting the worst-case variable combinations. The second objective was to distinguish “generic” variables, which could be assumed to have the same impacts on most premium connections, from “design-specific” variables, which might result in different performance trends in various connection types. The assessment results were used to develop TWCCEP criteria for selecting the biased connection test population and evaluation load cases.

Engineering analysis, numerical modelling, and reduced-scale testing were employed in the variable-impact assessment. Multiple reference configurations were considered for some variables, because sensitivities with respect to any individual variable might vary for different combinations of the other variables.

A variable was considered to have a major impact when variation of that variable within its production manufacturing tolerances or assembly targets or loading range caused a substantial change to a performance measure. Changes larger than 15 % relative to a value based on nominal conditions were typically considered to be substantial changes.

Following the impact assessment, the design and loading variables were categorized into five groups, as described in the following paragraphs.

Group 1: The first group consisted of the major-impact variables assumed common to most premium connection designs. Sensitivities to those variables were studied at the protocol development stage, and their worst-case combinations were established (“pre-set”) for later use during protocol execution. For example, these investigations included determination of sensitivity of connection sealability to “bake-out” at maximum operating temperature so that sufficient specimen bake-out duration and loading (free versus constrained bake-out) could be specified for the protocol.

Group 2: The second group of variables included those major-impact variables for which different connection types could be expected to display different sensitivity trends. Given the potential for such connection-specific response, the TWCCEP includes a front-end assessment of the sensitivity trends with respect to the variables in that group, so that connection-specific choices of the test specimen configuration can be made for each evaluated connection. For example, yield strength of the connection pin material can have a strong impact on the seal contact stress depending on the connection material grade and range of property variations allowed for a given connection. The TWCCEP requires examination of those impacts for each candidate connection before selecting material specifications for test samples.

Group 3: Variables in the third group were of similar characteristics as in the second group (i.e. having major impact and being design-specific), with a distinction in that inclusion of the third-group variables in the selection of the biased test population was considered impractical because of challenges associated with conducting analysis or controlling those variables in the manufacturing process (e.g. seal tapers). The TWCCEP recommends optional-task evaluations of connection performance with respect to the variables in this group.

Group 4: The fourth group was chosen to include variables of similar characteristics as the second and third groups (i.e. having major impact and being design-specific), except that the variables in the fourth group were considered to have those characteristics only in some applications and not in other applications (e.g. severe curvature loading). Similar to the third group, the TWCCEP recommends optional-task evaluations of connection performance with respect to the variables in the fourth group.

Group 5: the fifth group of design and loading variables included those variables that were not considered significant for specifying procedures for the connection performance assessment. For example, some threadform details such as flank angles do affect connection load transfer, but variations of those variables within their manufacturing tolerances do not significantly change

connection galling resistance, structural strength or sealability. The TWCCEP assumes nominal values for the variables in this group.

6.4.3 Pin-box interferences and tapers

Unless otherwise agreed by the assigner and the supplier, the following definitions shall be adopted:

- Diametric seal interference between the pin and box components of a candidate connection is the interference between the pin outside diameter and the box inside diameter at a reference seal location consistent with design and gauging practice for the candidate connection.
- Diametric thread interference between the pin and box components of a candidate connection is the interference between the pin and box pitch diameters at a reference thread location consistent with design and gauging practice for the candidate connection.
- For seals cut on conical surfaces, a seal taper is the change of seal diameter over a reference axial distance.
- For threads cut on conical surfaces, a thread taper is the change of thread pitch diameter over a reference axial distance.

For some connection designs, load transfer mode in the threads and manufacturing tolerances on thread forms will significantly impact diametral interferences. These impacts should be considered in the selection of minimum and maximum interference configurations for the biased test population ([12.3.4](#)) and test specimen specifications ([13.4.6](#)).

6.4.4 Material yield strength

Yield strengths and post-yield stiffnesses of connection component materials affect connection response to loading beyond the elastic limit. In general, two types of post-yield response are expected in a connection subjected to typical thermal-well loading:

- localized yielding due to stress-strain concentrations, for example, in thread roots or high-contact stress seal band;
- global yielding due to large mechanical strains generated by constrained thermal expansion, for example, in the pipe body and a connection's critical cross-sections.

The following assumptions are adopted:

- For most connection designs, the box component is appreciably stiffer than the pin component, and thus yield strength of the box material may be excluded from determination of the biased test population. Consideration of the box yield strength is an optional task;
- Yield strength of the pin material was found to have a major impact on the seal contact stress intensity, and is included as a mandatory task in determination of the biased test population for sealability tests;
- Material yield strength is not explicitly considered in specifying the test specimens for galling resistance tests. Manufacturing of the galling test specimens is guided by material selection based on sealability considerations;
- Impacts of pin and box material yield strength variations (within the candidate connection's manufacturing specifications) on localized yielding in thread roots is not explicitly addressed in selecting the biased test population. Those localized-yielding variations are assumed to not have a significant effect on the candidate connection's structural strength, which is assessed in the TWCCEP's full-scale tests.

6.5 Evaluation procedure

6.5.1 Safety standards

All activities required or recommended by a TWCCEP evaluation procedure should be conducted to appropriate safety standards, in accordance with safety requirements and policies in place in the facilities conducting those activities. No TWCCEP provision shall be considered as a basis for overriding any applicable safety requirements.

6.5.2 Seepage assessment — Random variations

Connection sealability performance might vary considerably even for connection samples that have been manufactured and assembled according to identical specifications. In particular, variable seepage rates can be expected in physical tests involving elevated temperatures. Such “random” behaviour can result from degradation of thread compound at high temperatures (dope bake-off), movement of dope solid particles (e.g. as dependent on pin and box surface finish, dope density variations, time), variations of connection geometry not fully controlled in the manufacturing process (e.g. waviness), and other variables.

Statistical variations in seepage response typically increase with temperature. Some historic evaluations for high-temperature applications (e.g. CSS) addressed this statistical variation by requiring testing of multiple specimens of the same configuration. While there is insufficient data to support a rigorous statistical analysis of how many specimens are required to provide a representative connection population, four specimens have been used as a reasonable compromise between practicality and statistical considerations.

The TWCCEP requires four specimens in the thermal cycle test (4.3 illustrates connection specimen definitions for various connection types). Two of those specimens are manufactured according to the worst-case tolerance combination for sealability at the maximum test temperature, and the other two are manufactured according to the worst-case tolerance combination for sealability at the minimum test temperature after one thermal cycle. If those tolerance combinations are found to be the same for the minimum and maximum temperature, then four specimens of the same target configuration are tested.

6.5.3 Seepage rate thresholds

Tolerance for seepage in field application varies, because it depends on the well configuration, properties of the surrounding formation, well location, environmental considerations, and other factors. Based on the current state of industry knowledge, no practical “universal” threshold can be selected to suit all field applications.

For reference purposes, TWCCEP adopts three seepage thresholds:

- 0.06 mL/min = reportable seepage rate threshold. Any seepage activity observed in any sealability test that is larger than this level must be reported by the evaluator. This threshold is consistent with ISO 13679 standard;
- 1 mL/min = maximum seepage rate in axisymmetric compression. This threshold is consistent with some historic evaluations performed for CSS applications;
- 10 mL/min = maximum seepage rate in axisymmetric tension and under non-axisymmetric bending. For the axisymmetric tension, this threshold is consistent with some historic evaluations performed for CSS applications.

In combined loading cases involving axial forces and lateral loading, different combinations of external loading will result in varying the stress distribution around the connection circumference. Contact stress intensity in the connection seal can also be expected to vary around the circumference. Nonetheless, a single threshold of 10 mL/min has been adopted for simplicity.

It is understood that the original selection of seepage threshold rates in the historic evaluations referred to above was based on prior investigations that had been conducted on several 178 mm (7 in) casing

connections, with no scaling for other connection sizes. Some connection users might find it justified, for their specific field applications, to adopt seepage thresholds different from the ones listed above. For example, a user might find it justified to scale the above historic seepage thresholds (1 mL/min and 10 mL/min) from the 177.8 mm (7 in) casing size by the ratio of the candidate connection size to the 177.8 mm size. If any threshold modifications are done within a specific TWCCEP evaluation program, the responsibility for any such threshold modifications rests with the assigner.

TWCCEP requires that:

- seepage rates be measured for individual connections (one side of a connection specimen for coupled connections, or one integral connection);
- the adopted seepage rate thresholds be documented and be applied to each individual connection (not to each connection specimen unless it is an integral connection, and not to strings with multiple specimens);
- measured seepage rates be reported for each event in which the measured seepage rate exceeds the reportable seepage rate threshold.

The reportable seepage rate threshold applies to each load step that contains a hold in any physical test. Each specified maximum seepage rate threshold applies to an average seepage rate calculated for holds at the same loading targets in all loading cycles (e.g. all high-temperature holds in the thermal cycle test), as described in [14.2.4.3](#).

It is recommended that other average and mean seepage rates (for the entire tested population) be calculated for information purposes.

6.5.4 Seal isolation

Sealability checks are conducted on primary connection seals that are isolated from any additional sealing mechanisms that might be active in the connection specimens. As a consequence, seepage detection ports need to be drilled into dope relief grooves, so that seepage across the primary radial seal is observed independently of any seepage blockage that might occur in the threads ([14.2.4](#)).

As another consequence, torque shoulder seals need to be disabled unless those are the primary sealing surfaces. If torque shoulders are the primary sealing surfaces, any other sealing surfaces that might impede gas flow to the seepage detection ports must be disabled (see [14.2.3](#)).

It is acknowledged that drilling of the detection ports into the connection dope relief grooves, and in some cases also disabling of the torque shoulder seals, might lead to relieving of the dope entrapment (see [6.5.5](#)) in a manner that is different from the field conditions.

6.5.5 Dope entrapment

Dope entrapment upon make-up can lead to deformation of the pin seal surface that exceeds the design intent, which might be detrimental to the connection sealability. For example, excessive axisymmetric deformation can lead to global reduction in the contact stress intensity. Alternatively, a circumferential buckling mechanism can cause the pin seal to become non-round (i.e. increase the pin waviness). Consequently, the seal contact stress distribution will be non-uniform, and seal burnishing might be inadequate.

Dope entrapment is more likely to occur when the amount of the dope applied prior to make-up is increased, and, to a lesser extent, when the makeup speed is increased. In a conservative sealability test, the largest amounts of dope allowed by the connection manufacturer should be applied to the test specimens. The specimen make-ups should be performed at maximum allowable speeds.

6.5.6 Thermal cycle test — Pre-test bake-out and hold durations

Each thermal cycle includes holds at maximum cycle temperature and at minimum cycle temperature. The duration of those holds should be long enough to capture time-sensitive impacts on the connection

behaviour, yet as short as possible to minimize the test duration (cost). The major time-dependent factors are: behaviour of the seal components (changes in dope phases, movement of solid particles), and stress relaxation of pin and box materials (impact of multi-axial relaxation on radial contact stress).

It is assumed that a “sufficiently” long bake-out of the test specimens in the sealability test will adequately simulate the time-dependent dope degradation that occurs in field service, and its impact on sealability. The bake-out should be done with external loading, so that the loading conditions are consistent with the field service, where the connections are in axial compression during heating and subsequent hold at elevated temperature.

TWCCEP specifies the bake-out duration to be 120 h (see [14.4.7.2](#)). Regarding dope degradation, it is assumed that once this bake-out is performed, no additional prolonged bake-outs are required at each high-temperature hold.

For typical OCTG materials, stress relaxation effects follow an exponential-decay with time. The relaxation is more pronounced in the initial portion of any hold than in the later stages of that hold. Stress relaxation strongly depends on temperature – it is higher at elevated temperatures than at room temperature. Stress relaxation also depends on applied stress and strain, with the amount of relaxation typically increasing with the stress-strain magnitude (although that relationship is expected to be material-specific).

Engineering experience indicates that the majority of stress relaxation occurs within 24 to 48 h, when high-temperature strain is held constant. The adopted bake-out duration is thus adequate for relaxation to be nearly exhausted in the first thermal cycle. Relaxation is small during low-temperature holds, so that subsequent 4 h high-temperature holds are long enough to counteract low-temperature relaxation.

Any pre-test exposure of the test specimens to elevated temperatures should be carefully considered, to avoid any significant changes of the specimen material properties that would be inconsistent with the operational loading scenario.

6.5.7 Pressure and temperature loading in thermal cycle test and analysis

TWCCEP’s loading procedure for the thermal cycle test (see [14.4.7](#)) is based on the assumption that in thermal operations internal casing pressure closely follows the saturated-steam relationship with temperature, although the sequence of pressure and temperature changes in field operations might not exactly correspond to the saturated-steam relationship. For example, casing temperature typically lags casing pressure during the heating part of a thermal cycle, due to delays caused by finite heat transfer rates. In the cooling part of a cycle, temperature can decrease while well pressure is maintained by ingress of reservoir fluids. The departures of the pressure-temperature loading sequence from the saturated-steam relationship will vary for different field operations, and thus would be challenging to quantify and/or specify for general evaluation purposes. Those loading-sequence differences are considered to have little impact on connection performance during the test holds under full pressure and extreme temperature. For that reason, and also for practical test-control considerations, those differences are disregarded in the thermal cycle test procedure.

TWCCEP’s modelling guidelines (see [Annex A](#)) specify a load path in which pressure changes precede temperature changes in a simulated thermal cycle. In some supplementary numerical evaluations and parametric studies conducted on a generic connection model in support of the TWCCEP development, that load path was found to be somewhat more severe than simultaneous application of the pressure and temperature-driven loads. Subsequently, that sequence was chosen for the TWCCEP’s numerical evaluation tasks associated with selection of the biased test population. The resultant discrepancy between the loading sequence in the analysis and physical test is believed to be not significant for connection evaluation purposes.

6.5.8 Dependence of material strength on temperature

The TWCCEP assumes consistency of material-strength dependency on temperature. For a given production material, proportional reduction of yield strength at any given elevated temperature is

assumed to be the same for samples of that material coming from the lower end and from the higher end of the allowable range of the production yield strength.

While it is recognized that material temperature-dependence is typically not controlled in pipe production, the TWCCEP developers will welcome any data that might confirm or refute this assumption in future editions.

6.6 Scope of reporting

The TWCCEP requires that a comprehensive evaluation report be issued upon completion of each evaluation program. The evaluation report is required to contain a description of the assumed program roles (3.33), details of the candidate connection, all data acquired in the analysis and physical testing, comparison of the results with threshold performance requirements, and any non-compliances with respect to the TWCCEP evaluation procedure.

The requirement for the evaluation report to contain all data acquired in the analysis and physical testing will enable a thorough assessment of the candidate connection performance, not only at the time when the evaluation program is completed but also at later occasions. Such a future assessment might be conducted by a party that was or was not involved in the original evaluation. It might also be performed for an application that might be similar or different from the application targeted in the original evaluation. In the opinion of the TWCCEP developers, design engineers working on such future projects will benefit more from knowledge of the connection response to each loading step in the evaluation procedure than from comparison of the selected performance indicators to arbitrary threshold requirements. Therefore, the Evaluation Report is intended to provide a complete record of the executed evaluation program.

7 Program roles and proprietary design information

7.1 Program execution roles

It is anticipated that the TWCCEP will be executed in different types of connection evaluation programs – some commissioned by users (operators), some by connection manufacturers, and some by groups involving various companies. In order to facilitate definition and interpretation of the evaluation procedure (3.15) the TWCCEP defines the following program roles:

- Assigner: the party that commissions an evaluation program, controls its execution, and owns the rights to an evaluation program's data and results.
- Supplier: the party that manufactures a candidate connection.
- Evaluator: the party that performs analysis and testing specified by an evaluation procedure.
- Inspector: the party that verifies compliance of the evaluation program execution with TWCCEP requirements.

[Annex C](#) provides recommendations for role assignments, responsibilities and combinations in which single/multiple parties can assume single/multiple program roles.

7.2 Proprietary connection design information

It is recognized that connection design information is proprietary by nature, and that a supplier might not want to reveal some of that information, e.g. machining drawings, to any other party. The TWCCEP is structured so that it can be executed with or without exchange of candidate connection drawings among the parties involved in the evaluation tasks.

The following principles are adopted by the TWCCEP for handling of proprietary/confidential information for the purpose of performing TWCCEP evaluation tasks:

- The TWCCEP does not require a supplier to provide candidate connection machining drawings to any other party within execution of an evaluation procedure.
- The TWCCEP does not require an evaluator to reveal any candidate connection machining drawing details in the evaluation report, except the information that is necessary to uniquely identify the candidate connection (e.g. the interfacial component has to be described with enough detail to allow unique identification of a product that has been tested in an evaluation program).
- At the onset of each evaluation program, the assigner and the supplier shall agree on the extent of exchange of proprietary information for the purpose of executing the evaluation procedure. If the assigner and the supplier are the same party, then that party alone decides on any such exchange.
- The evaluation report shall describe all role assignments, including selection of parties performing various evaluation tasks and their respective responsibilities, and the agreement between the assigner and the supplier relative to exchange of proprietary design information.

EXAMPLE Evaluation program conducted in-house by a supplier:

When an evaluation program is conducted in-house by a connection manufacturer, the manufacturer might simultaneously assume the roles of the assigner, the supplier, and the evaluator. The manufacturer will use the candidate connection drawings internally to build FEA models and perform Task 2.2 Specimen Configuration Analysis (see [12.3.1](#)). The results will be included in the evaluation report, but possibly with no geometry details of the candidate connection. When those details are not revealed to the inspector, then the inspector will be able to review the analysis results but not the consistency of the FEA model with the connection's geometry.

8 Compliance requirements

8.1 Compliant evaluation program

An evaluation program shall be considered compliant with the requirements of this protocol if and only if either of the following two sets of conditions is satisfied:

- Set 1: The evaluation program was executed in full compliance with all clauses of the TWCCEP; and such fully compliant execution is documented as such by the evaluation report and the inspection report;
- Set 2: The evaluation program was executed in partial compliance with the clauses of this protocol; all non-conformances are described by the evaluation report and/or the inspection report, whichever is relevant; and each such non-conformance is accepted as not having substantially alleviated the requirements of this protocol and not having led to a substantial misrepresentation of the candidate connection's performance.

[8.2](#) defines "non-conformance" and describes the process for accepting a non-conformance as satisfying the above Set 2 conditions.

8.2 Program non-conformances

In this protocol, a non-conformance occurs whenever one or more conditions of a mandatory provision are not satisfied (i.e. non-conformances apply only to "shall" clauses). In general, non-conformances might occur with respect to program roles, analysis or test procedures, or reporting.

The practicality of carrying out an evaluation program might sometimes suggest that non-conformances be accepted during the program execution (e.g. when a test specimen gets damaged and needs to be replaced by another specimen, and the available replacement specimen has a different loading history than the damaged specimen) or after the program execution (e.g. when data review indicates that a specimen temperature was outside the allowed range in a certain location). Acceptance of a non-conformance will be facilitated when the intended use of the evaluation program results is known at

the time of the program execution, for example when a candidate connection is being evaluated for use in an existing operation with defined specific requirements. In other cases, acceptance of a non-conformance might be more difficult, for example when a candidate connection is evaluated for future applications with operational conditions unknown at the time of the evaluation program execution; or when a connection manufacturer evaluates a new connection for several prospective users/applications that might differ in non-conformance tolerance.

The following principles shall be observed in the process of accepting a non-conformance as not having substantially alleviated the requirements of this protocol and not having led to a substantial misrepresentation of a candidate connection's performance:

- at least two different parties performing the program roles shall assess the rationale and potential implications of the non-conformance, and agree on accepting the non-conformance;
- one of the parties mentioned above shall be the assigner. The other party shall be the first party that is different from the assigner in the following order: supplier, evaluator or inspector;
- all non-conformances shall be documented and the relevant documentation explaining the rationale for accepting each non-conformance shall be retained by the assigner as part of the evaluation report.

8.3 Performance acceptance

In any single evaluation program, a candidate connection shall be considered to have met the performance requirements of this protocol for the selected ASL if all of the following conditions are satisfied:

- the evaluation program has been compliant with the requirements of this protocol (according to criteria specified in 8.1);
- the candidate connection's performance, measured by the evaluation procedure, has met all applicable threshold performance requirements (only results of full-scale testing shall be considered in meeting the threshold performance requirements);
- execution and results of the evaluation program have been fully documented in an evaluation report and, as applicable, in an inspection report; and copies of the evaluation report and the inspection report have been delivered to the assigner.

8.4 Conformance of results from previous TWCCEP evaluations

Results of an evaluation program carried out in accordance with prior versions of the TWCCEP shall be considered representative of an evaluation carried out in accordance with the current version of the TWCCEP, provided that the candidate connection met threshold performance requirements applicable when the evaluation program was executed, and provided that the revisions between the prior TWCCEP version and the current TWCCEP version have not caused a substantial change in the evaluation procedure or the threshold performance requirements. If such a substantial change has been made and acknowledged in the TWCCEP revision summary, then the results of the prior evaluation program might be considered insufficient for some applications, and incremental evaluation might be required. The scope of any such incremental evaluation shall be by agreement between the assigner and the supplier.

In all cases, the evaluation report and the inspection report shall indicate the TWCCEP version (release) to which the evaluation program was conducted.

8.5 Use of data from previous evaluations

Analytical and experimental data acquired in a connection and/or material assessment prior to a TWCCEP evaluation program is referred to as prior evaluation data. Such prior evaluation data may sometimes be used in lieu of some or all analysis or testing required by the TWCCEP evaluation program. Any party involved in TWCCEP program execution may propose use of prior evaluation data, but any such use shall be agreed by the assigner and the supplier.

In general, the TWCCEP allows use of prior evaluation data when either: 1) that data are fully compliant with TWCCEP requirements or 2) that data are not fully compliant with TWCCEP requirements but some additional conditions are satisfied. The following paragraphs provide provisions for either of the above two scenarios.

The following process shall be followed for use of any prior evaluation data in a TWCCEP evaluation program. Prior evaluation data may be used in a TWCCEP evaluation program if:

- a) a person/company who is a substantially qualified party (3.38) to perform connection evaluation (analysis and/or testing, whatever the case might be) and interpret results thereof:
 - 1) conducts a thorough technical review of the prior evaluation data;
 - 2) verifies that the scope, procedures, execution history, and documentation that were employed to acquire prior evaluation data have all met or exceeded the respective requirements of the TWCCEP for the candidate connection;
 - 3) issues a written confirmation that such verification was conducted and includes the conclusions reached;
- b) if the person/company in a) acts on behalf of the supplier of the connection for which use of prior evaluation data are proposed, then at least one other person/company that is a substantially qualified party to interpret prior evaluation data and is independent from that connection supplier provides written concurrence with the conclusions of the verification referred to in a).

If a review of prior evaluation data is conducted as referred to in a) and b) and the prior evaluation data is found to not meet all TWCCEP requirements (for example, because significant discrepancies are identified between the prior evaluation and the TWCCEP procedure), then:

- c) if the review of prior evaluation data is done by a person/company independent from the supplier of the connection for which use of prior evaluation data are proposed, as discussed in a) above, that person/company shall recommend additional analysis and/or testing to supplement the prior evaluation data such that the combined extent of the prior evaluation data and the additional analysis and/or testing will satisfy all requirements of the TWCCEP; or
- d) if the review of the prior evaluation data is done by the supplier of the connection for which use of prior evaluation data are proposed, and that review is verified by an independent party, as discussed in a) and b) above, then the supplier and that independent party shall agree on additional analysis and/or testing to supplement the prior evaluation data such that the combined extent of the prior evaluation data and the additional analysis and/or testing will satisfy all requirements of the TWCCEP.

Upon that additional analysis and/or testing being carried out as discussed in c) or d) and confirmed in writing as having been carried out, the prior evaluation data and the additional analysis and/or testing shall be deemed to jointly satisfy the requirements of the TWCCEP.

Any prior evaluation data used in an evaluation program shall be included in the evaluation report for the corresponding evaluation program.

8.6 Conformance to lower ASLs

Conformance of the assessment results of the candidate connection to the performance requirements for the selected ASL shall be interpreted as conformance to all other ASLs defined by lower temperatures than the ASL to which the candidate connection has been evaluated.

9 Application severity levels

9.1 Thermal well load path

The TWCCEP recognizes that casing connections in thermally-stimulated wells, such as SAGD or CSS wells, experience a common loading scenario in which axial loads on the casing pipe-connection system and internal casing pressures are largely driven by cyclic temperature changes.

Temperature-driven axial force contributes the majority of the loading on the pipe-connection system. As an example, Figure 4 illustrates a typical axial load cycle experienced by L80 casing cycled between a minimum temperature of 5°C and a maximum temperature of 290°C (specifications for temperature ranges distinguished by the TWCCEP are provided in 9.3). The chart on the left side of Figure 4 shows the relationship between the pipe body stress and well temperature, and the chart on the right side shows the same relationship in terms of mechanical strain generated by axially constrained thermal expansion.

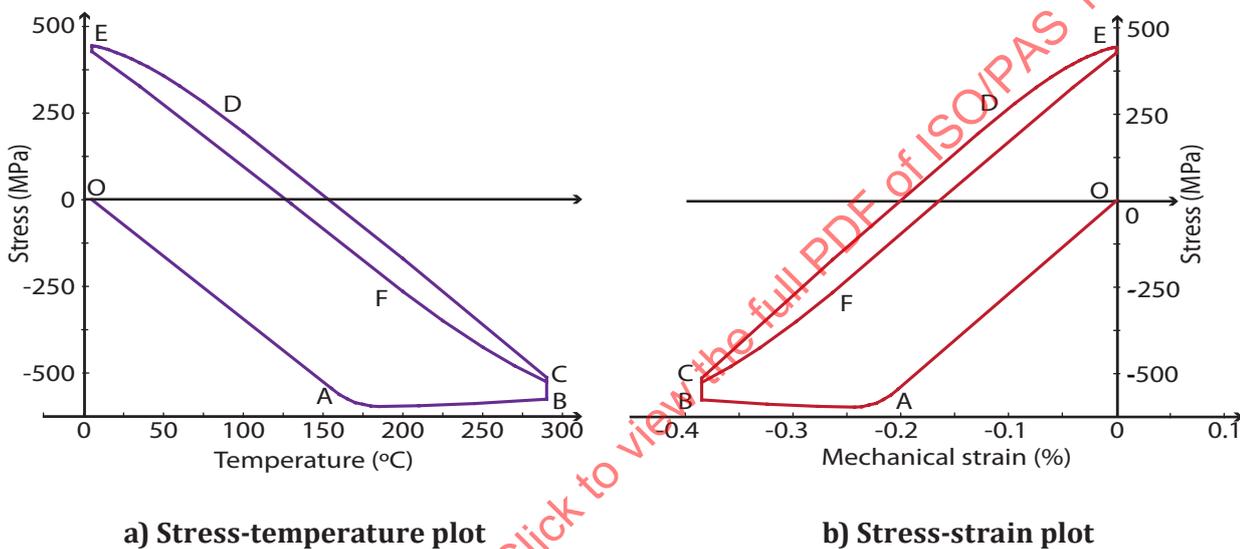


Figure 4 — Example of thermal-well load path (1.5 thermal cycles)

The load cycle commences with constrained heating, in which compressive axial stress initially builds according to the elastic stress-strain relationship (load path OA). The casing string yields when the compressive yield strength is reached (at approximately 180°C in this case). The casing response to further temperature increase is influenced by the temperature-dependence of the yield strength, which typically reverses the slope of the stress-temperature curve, although this trend can be somewhat offset by strain hardening (load path AB). During steaming at maximum temperature, stress relaxation occurs, which reduces the compressive axial stress in the pipe-connection system (path BC). When cooling, the string experiences constrained thermal contraction, which generates axial tension (path CD). The reverse loading curve demonstrates a reduction of the elastic range and a corresponding rounded shape of the cyclic stress-strain curve. In the example illustrated in Figure 4, the casing yields again under tension (at approximately 100°C). The maximum tensile stress is reached upon return to the lower-bound temperature (path DE). Heating in the second cycle follows a cyclic stress-temperature (or stress-strain) curve (path EF). Subsequent loading in the second cycle and later cycles qualitatively follows the cyclic heating-cooling loop (path EFCDE), although each cycle might result in a slight change (typically increase) of the tensile stress at the cycle-end. The width of the hysteresis loop EFCDE provides a measure of average pipe-body plastic strain accumulated in each cycle. Specific progression of the load-deformation loops depends on cyclic properties of the casing material. For example, modest increases in the end-of-cycle tension typically occur with further cycling.

Internal casing pressure typically constitutes a less severe loading component than axial tension and compression, but it might have a significant impact on the casing deformation when the casing yields due to the axial forces. In the event that a connection leaks, the magnitude of the internal pressure can also be expected to impact the leak rate.

Internal pressure loading applied in the TWCCEP's evaluation procedure is based on the assumption that in thermal operations the internal pressure closely follows the saturated-steam relationship with temperature, although it is recognized that cooling can also occur with retained reservoir pressures. The adopted pressure-temperature relationship for saturated steam is illustrated in [Figure 5](#).

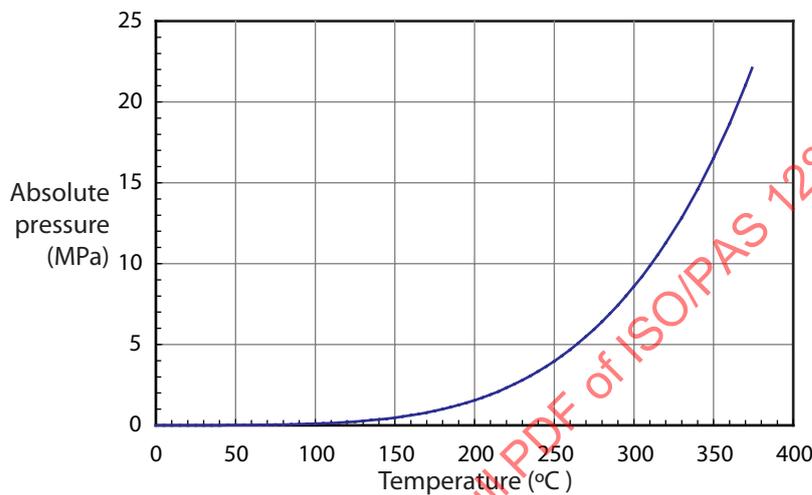


Figure 5 — Relationship between pressure and temperature for saturated steam

The TWCCEP assumes the cyclic loading sequence described in the above paragraphs as the basic load path for the analytical and testing evaluation tasks, with some modifications resulting from practical considerations (also see [6.5.7](#)). The following three characteristic stages of the thermal cycle were chosen as reference loading conditions:

- a) connection make-up;
- b) maximum-temperature hold;
- c) return to low temperature at the end of the thermal cycle.

9.2 Temperature as controlling parameter

The following list summarizes the reasons for which temperature is recognized as the major parameter influencing thermal-well loading and connection sealability and structural response:

- Constrained thermal expansion of cemented casing, when heated to the maximum operating temperature, generates high compressive loads that might lead to pipe body and/or connection yielding. The magnitude of the cyclic axial loads generated during temperature excursions, and the degree of thermally-driven deformation, strongly depend on the applied temperature range;
- In field service, applied internal pressures typically follow the pressure-temperature relationship for saturated steam;
- Properties of casing pipe and connection materials vary with temperature. The material yield strength typically decreases as temperature rises, and creep and relaxation effects become more pronounced at elevated temperatures;
- Elevated temperatures affect properties of connection interfacial components (e.g. thread compounds, coatings), and thus influence their role in premium seal effectiveness. Higher

temperatures are typically associated with faster property changes in coatings and thread compounds, although resistance to such degradation might vary substantially between different coatings and compounds.

The above list excludes geotechnical activity and corrosive effects, which are not addressed by the TWCCEP.

9.3 Definition of application severity level

Thermal well operations are diverse. While the thermal-well loading sequence is assumed to be common (and consistent with the loading path described in 9.1), utilized temperature ranges vary. Assuming a single reference temperature for connection evaluation purposes would lead to the evaluation conditions being too severe compared to some field applications, and perhaps not severe enough for other applications. To permit consistent use of the evaluation procedure (3.15) for various severities of thermal-well operations, the TWCCEP defines multiple ASLs that relate to increasingly arduous service conditions, and consequently specify increasingly arduous evaluation conditions.

The TWCCEP categorizes the ASLs based on the upper-bound temperature, as shown in Table 3. For example, ASL-290 denotes a severity level choice appropriate for operations in which the maximum operating temperature will not exceed 290°C. Applications in which maximum temperature does not exceed 180°C are not addressed by TWCCEP.

The TWCCEP arbitrarily assumes 5°C as the lower-bound temperature for all ASLs. This temperature is considered conservative for operations in moderate or colder climates, because the casing string is not expected to be at a lower temperature during cementing, and is not expected to cool down to a lower temperature during the operational cycles. While lower-bound temperatures higher than 5°C can be expected in some climates, the TWCCEP assumes the resulting extra conservatism as an additional safety margin that will enable a “qualified” connection to be used in various climates without a need to repeat any testing.

All axisymmetric loads applied in the evaluation procedure are derived from the ASL specifications. Axial loads are strain driven, resulting from constrained thermal expansion and contraction within the range defined by the lower-bound and upper-bound temperatures. Consequently, the magnitudes of axial forces are material-specific. They depend on the coefficient of thermal expansion of the casing pipe (and to a lesser degree of the coupling material), and the material stress-strain characteristics.

Table 3 — TWCCEP application severity levels

Application severity level (ASL)	Maximum operating temperature	Lower-bound temperature	Upper-bound temperature
(°C)			
Not applicable	180		180
240	181-240	5	240
290	241-290	5	290
325	291-325	5	325
350	326-350	5	350

The internal pressures derived from the saturated-steam pressure-temperature relationship are listed in Table 4. Some field applications might involve operational pressures other than the pressures resulting from the saturated steam curve. When the operational pressures are lower than the saturated steam pressure, then the TWCCEP accepts the extra conservatism as a margin that will enable a “qualified” connection to be used in a variety of applications in which internal pressure might vary from time to time. The current TWCCEP version does not address loading scenarios in which the operational pressures exceed the saturated steam pressure. Customized evaluations are recommended for those operations.

Table 4 — Resultant derivative loads

Upper-bound temperature (°C)	Axial loads (Strain-driven)	Maximum internal pressure (MPa)
180	Resultant from constrained thermal expansion between lower- and upper-bound temperatures	1.0
240		3.3
290		7.4
325		12.1
350		16.5

9.4 Selection of application severity level

The assigner (3.3) shall select the ASL (3.2) for each evaluation program (3.16) at the program onset.

An ASL with an upper-bound temperature higher than the maximum temperature expected in the relevant field service shall be chosen for an evaluation program.

Prior to program commencement, the assigner should consult with the supplier (3.39) to confirm that the selected ASL conforms to the supplier's intended service environment for the candidate connection.

10 Program blocks and tasks

10.1 Evaluation tasks and sequence — Overview

The basic structure of the TWCCEP evaluation procedure is outlined in Figure 6. The procedure consists of the following blocks (groups of related tasks): program specifications; biased test population; specimen procurement; full-scale testing and supplementary analysis; and reporting.

The program specifications block (Clause 11) describes the assigned program roles, the candidate connection, and the selected program options, such as the ASL. If relevant prior data are available and intended for use in the program being commissioned, it needs to be referenced in this block as well. The program specifications are selected in Tasks 1.1 to 1.4.

Selection of program specifications for the candidate connection might impact subsequent use of the program results. For example, since the connection interfacial components (i.e. coating and thread compound) play a fundamental role in connection sealability in thermal applications, the TWCCEP program results are considered valid only for the interfacial components that are included in the candidate connection specifications (and used for the test specimens), unless it is demonstrated that use of a different interfacial component does not result in a substantial change of the candidate connection performance.

Determination of the biased test population (Clause 12) is conducted to derive specifications for the full-scale connection testing specimens. This front-end assessment consists of two tasks: Task 2.1 Initial Material Property Characterization, and Task 2.2 Specimen Configuration Analysis. Task 2.1 is conducted to obtain reference properties of the candidate connection's component material(s). These reference properties are acquired by coupon-scale laboratory tests of a random sample of the connection production material(s), at temperatures spanning the selected ASL. The acquired reference properties are used to formulate a constitutive material model for subsequent numerical simulations. Task 2.2 Specimen Configuration Analysis is a parametric finite-element sensitivity study. It is conducted to select worst-case combinations of geometric and material-property variables allowed by the manufacturing tolerances, and to select target make-up torques for sealability tests. 12.3 describes the scope of this analysis, and Annex A provides associated modelling guidelines.

To facilitate program execution, the material characterization and sensitivity analysis can be performed well in advance of the other evaluation tasks. Pre-existing material data and FEA results can also be used if their conformance to TWCCEP requirements is demonstrated.

The results of the front-end analysis affect decisions relative to the procurement of specimen material(s) (Clause 13). If material properties are shown to have a significant impact on the candidate connection's structural response, the range of material properties allowed for the test samples is biased to those properties that lead to worst-case combinations of the material variables. If no significant impact of the material variables is found, the test samples can be procured from any material with properties in the range allowed by the connection production specifications.

After the test specimen's mother pipes are procured in Task 3.1, their mechanical properties are verified in Task 3.2, by a limited number of coupon-scale tests. Since the purpose of those tests is to confirm consistency of the test sample material with the specifications defined by the front-end configuration analysis, they can be referred to as quality-assurance checks. The test specimens are then machined and gauged according to the selected geometrical specifications in Task 3.3. Manufacturing variables not predetermined by the TWCCEP are assumed to be within normal production values. It is strongly recommended that duplicate specimens (replacement spares) be manufactured for each full-scale test specimen configuration.

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Block	Task	Description	Clause		
1	Program Specifications	1.1 Program Roles	Assignment of program roles	11.2	
		1.2 Candidate Connection	Unique identification of pin, box, interfacial component	11.3	
		1.3 Program Options	Selection of ASL and optional tasks	11.4	
		1.4 Prior Evaluation Data	Use of analysis/test data from prior evaluations	11.5	
2	Determination of Biased Test Population	2.1 Initial Material Property Characterization	Material property test of a random production sample Reference properties for input into FEA model	12.2	
		2.2 Specimen Configuration Analysis	Parametric analysis to determine critical design-specific configurations for test specimens		12.3
			2.2.1 Nominal Reference	Nominal geometry, material properties, assembly torque	
			2.2.2 Specimen Geometry	Worst diametric interferences and thread tapers	
			2.2.3 Seal Tapers (*)	Variations due to tolerances for seal tapers	
			2.2.4 Material Properties	Worst yield strength range for pin and box materials	
2.2.5 Make-up Torques	Target make-up torques for sealability tests				
2.2.6 Test vs Production (*)	Best test specimen vs worst production specimen				
3	Test Specimen Procurement	3.1 Specimen Pipe Procurement	Pipe joints and coupling stock as per specifications for biased test population	13.2	
		3.2 Material Property Verification	Verification of material properties of procured pipes	13.3	
		3.3 Specimen Machining and Gauging	Per specifications for biased test population 1 2 3 4 5 6 Spares	13.4, 13.6	
4	Full-Scale Tests and Supplementary Analyses	4.1 Galling Resistance Test	Multiple make-ups and break-outs 1 2 3 5	14.3	
		4.2 Thermal Cycle Test	Axisymmetric configuration and loading 10 thermal cycles from room to maximum ASL temperature 3 4 5 6	14.4	
			Specimens re-labeled based on results of thermal cycle test: RX RY		
		4.3 Bending Evaluation	4.3.1 Bending Analysis (*)	Sensitivity to non-axisymmetric bending	14.5
			4.3.2 Bend Test (*)	Bending limit for structural integrity and sealability 2 RY	
		4.4 Limit-Strain Test	4.4.1 Loc. Strain Seepage (*)	Strength and sealability at increasing tensile strains 1 RX	14.6
4.4.2 Tension Limit	1 RX				
4.5 As-Tested Configuration Analysis (*)	Analysis of as-tested configuration in support of acquired experimental results	14.7			
5	Reporting	5.1 Evaluation Report	Data and results from analysis and testing Comparison with threshold performance requirements	15	
		5.2 Inspection Report	Compliance with TWCCPE requirements		

(*) - denotes optional task

Figure 6 — Blocks and tasks of TWCCPE evaluation procedure

Six specimens are subjected to full-scale testing. [Clause 13](#) describes specimen configurations and the corresponding numbering convention. As much as practical, the configuration of each specimen is

designed to represent the worst-case combination of tolerances with respect to performance measures assessed in those tests to which the specimen is subjected. The testing sequence for each specimen is illustrated in [Figure 6](#) (specimen numbers are marked in blue boxes).

TWCCEP’s fourth block contains specifications for full-scale tests and supplementary analyses ([Clause 14](#)). Some tasks in this block are mandatory and some are optional. The mandatory tasks in this block are: Task [4.1](#) Galling Resistance Test, Task [4.2](#) Thermal Cycle Test, and Task [4.4.2](#) Tension Limit. The optional tasks are: Task [4.3](#) Bending Evaluation (both subtasks), Task [4.4.1](#) Localized Strain Seepage, and Task [4.5](#) As-Tested Configuration Analysis.

[Table 5](#) summarizes the mandatory and optional tasks and associated data categories. The task outcomes are categorized according to the data types described in [6.3.7](#): input for subsequent tasks, key performance measures, and auxiliary performance data.

Table 5 — Mandatory and optional tasks and resultant data categories

Task		Completion	Resultant data category	Clause	
2.1	Initial Material Property Characterization	Mandatory	Input for subsequent tasks	12.2	
2.2	Specimen Configuration Analysis:		Input for subsequent tasks and auxiliary performance data	12.3	
	2.2.1	Nominal Reference			Mandatory
	2.2.2	Specimen Geometry			Mandatory
	2.2.3	Seal Tapers			Optional
	2.2.4 Material Properties:				
	2.2.4.1	Pin Yield Strength			Mandatory
	2.2.4.2	Box Yield Strength			Optional
	2.2.5	Make-Up Torques			Mandatory
2.2.6	Test Versus Production	Optional			
3.2	Material Property Verification	Mandatory	Input for subsequent tasks	13.3	
4.1	Galling Resistance Test	Mandatory	Key performance measure	14.3	
4.2	Thermal Cycle Test	Mandatory	Key performance measure	14.4	
4.3	Bending Evaluation:		Auxiliary performance data	14.5	
	4.3.1	Bending Analysis			Optional
	4.3.2	Bend Test			Optional
4.4	Limit-Strain Test:		Auxiliary performance data	14.6	
	4.4.1	Localized Strain Seepage			Optional
	4.4.2	Tension Limit			Mandatory
4.5	As-Tested Configuration Analysis	Optional	Auxiliary performance data	14.7	

(*) - data is auxiliary beyond average thermal strain. See [14.6](#).

The scope of the full-scale tests has been structured to reflect the loading encountered by casing and connection systems during assembly and field service. The galling resistance test is conducted to verify that the candidate connection can withstand multiple make-ups and break-outs without severe galling of thread surfaces or appreciable deterioration of seal surfaces. The thermal cycle test assesses the candidate connection sealability and structural integrity under combined, thermally-induced cyclic loading. This test includes specimen bake-out and multiple thermal cycles with temperature and pressure changes consistent with the selected ASL. Four specimens are cycled, either in one or more strings or individually. Upon completion of the thermal cycle test, the specimens are re-ordered according to

their performance in that test. One cycled specimen and one non-cycled specimen are designated for the optional bend test, in which the connection sealability and structural integrity are assessed under curvature loading. One cycled specimen and one non-cycled specimen are subjected to the limit-strain test, in which limits of connection structural integrity and (optionally) sealability are assessed under increasing, tensile axial strain. Detailed test procedures and threshold performance requirements for each test are included in [Clause 14](#).

Galling resistance, structural strength, and sealability measured in the full-scale tests are the only TWCCEP evaluation results that are compared to threshold performance requirements; only these full-scale test results contribute to the pass-fail assessment of the tested candidate connection.

Supplementary analyses are recommended to evaluate connection performance indicators that might be critical for some operations but not for others. Task 4.3.1 Bending Analysis is recommended for applications in which severe bending and/or shear is anticipated during installation or during well operation due to geo-mechanical loading. Task 4.5 As-Tested Configuration Analysis is recommended to be conducted in support of interpreting the acquired experimental results; for example when some tested connections are considered for classification as excluded connections ([3.21](#)).

Results of supplementary analysis are not compared to threshold performance requirements, but may be used to specify additional testing to assess connection performance under application-specific conditions that are not simulated in the mandatory tests.

Program reporting is conducted in Task 5.1 Evaluation Report. The evaluation report contains all analytical and test data collected in the evaluation program. Data acquired in full-scale tests is compared with TWCCEP's threshold performance requirements ([3.45](#)). The inspection report is prepared in Task 5.2 and attached to the evaluation report. The inspection report verifies compliance of the conducted evaluation program with TWCCEP's procedures. [Clause 15](#) describes the reporting requirements in detail.

10.2 Critical path tasks

TWCCEP distinguishes several tasks in the evaluation procedure ([3.15](#)) as critical path tasks, whose output has substantial impact on subsequent task execution and on resultant assessment of the candidate connection ([3.7](#)). A list of the critical path tasks is given in [Table 6](#).

TWCCEP recommends that execution and results of the critical path tasks be independently reviewed, to ensure that correct output from those tasks is incorporated in other related tasks and in comparisons with the threshold performance measures ([3.45](#)). The extent of such an independent review should be considered in view of guidelines provided in [Annex C](#), and selected by agreement between the assigner ([3.3](#)) and the supplier ([3.39](#)).

Table 6 — Critical path tasks

Task		Clause
1.4	Prior Evaluation Data	11.5
2.1	Initial Material Property Characterization	12.2
2.2	Specimen Configuration Analysis:	12.3
	2.2.1 Nominal Reference	
	2.2.2 Specimen Geometry	
	2.2.3 Seal Tapers (*)	
	2.2.4 Material Properties (*)	
	2.2.5 Make-Up Torques	
2.2.6 Test versus Production		
3.2	Material Property Verification	13.3
3.3	Test Specimen Machining and Gauging	13.4, 13.6
4.1	Galling Resistance Test	14.3
4.2	Thermal Cycle Test	14.4
4.3	Bending Evaluation:	14.5
	4.3.1 Bending Analysis (*)	
	4.3.2 Bend Test (*)	
4.4	Limit-Strain Test:	14.6
	4.4.1 Localized Strain Seepage (*)	
	4.4.2 Tension Limit	
4.5	As-tested Configuration Analysis (*)	14.7
(*) – applies only to the performed optional tasks		

11 TWCCEP program specifications

11.1 General requirements

This Clause describes the TWCCEP tasks included in the program specification block (see [Figure 6](#)). The tasks in this block are conducted to specify information that will allow unique identification of parties involved in the evaluation program ([3.16](#)), the candidate connection ([3.7](#)), and the options selected for the evaluation procedure ([3.15](#)).

This block contains four tasks: Task 1.1 Program Roles ([11.2](#)), Task 1.2 Candidate Connection ([11.3](#)), Task 1.3 Program Options ([11.4](#)), and Task 1.4 Prior Evaluation Data ([11.5](#)). Details of those four tasks are described in the following sub-clauses of [Clause 11](#). All tasks in this block are mandatory.

Additional information shall be included in program specifications when necessary to achieve unique identification of the candidate connection and the selected program options.

All information obtained in the program input shall be documented in the evaluation report ([3.17](#)).

11.2 Identification of program roles

Task 1.1 is performed to identify all parties known to be involved in the evaluation program at its onset, and their assigned tasks. If other parties become involved in the evaluation program during its execution, then the information about those parties shall be added to program specifications accordingly.

If multiple parties are assigned to a role, the program specifications shall indicate the assigned sets of responsibilities within the shared role.

[Table 7](#) illustrates the required extent and recommended format of program specifications on role assignments. Specific assignments in [Table 7](#) are listed as examples only, and are not to be interpreted as TWCCEP provisions or recommendations.

Table 7 — Example of program specifications for role assignments

Program role	Company	Responsibility/task	Source/sub-task
Assigner	Operator A	Selection of ASL	This example assumes a program jointly commissioned/funded by Operator A and Manufacturer B
	Manufacturer B	Selection of candidate connection	
		All other assigner tasks are shared	
Supplier	Manufacturer B	Provision of mother pipe and test samples	
Evaluator	Manufacturer B	Material property characterization	Prior evaluation data
		Specimen configuration analysis	Existing previous results
	Engineering Firm C	Specimen configuration analysis	Additional analysis
	Engineering Firm D	Full-scale testing	
Inspector	Engineering Firm D	Specimen machining and gauging	Third-party thread/seal gauging
	Engineering Firm C	Full-scale testing	Galling resistance test
	Engineering Firm E	Full-scale testing	Thermal cycle test
	Engineering Firm F	All other inspection tasks	

11.3 Identification of candidate connection

In Task 1.2, specifications for the candidate connection (3.7) shall uniquely identify the connection product that is the subject of assessment in the evaluation program (3.16), and the candidate connection's assembly procedure recommended by the supplier (3.39). [Table 8](#) illustrates the required scope of, and recommended format for, the candidate connection specifications.

The first group of specifications in [Table 8](#) relates to the candidate connection's production specifications, and include the connection name, size, weight, pin and box materials, and interfacial components (3.24).

If the candidate connection's pin and/or box materials are manufactured to a design-specific set of specifications that are different from API grade specifications (e.g. a narrowed-down range of yield strength), then those design-specific production manufacturing specifications shall be identified in Task 1.2 and subsequently used in determination of the biased test population (Task 2.1 and 2.2, see [12.2](#) and [12.3.1](#)) and for procurement of specimens for full-scale testing (Task 3.1, see [13.2](#)).

Table 8 — Extent and format of candidate connection specifications

1. Identification of candidate connection	
Product name	
Size	
Weight	
Pin material designation (Note 1)	
Box material designation (Note 1)	
Interfacial components	
2. Connection schematic (Note 2)	
Diagram: attach separate page(s) with schematic cross-sectional diagram	
3. Production specifications (Note 3)	
Process control/quality management plan	Drawing or document revision and date
Pin drawing(s)	
Box drawing(s)	
Pin surface treatment/type specification	
Box surface treatment/type specification	
Swage/stress relief procedure	
Gauge calibration procedure	
Gauging and geometry inspection/QA procedure	
Material property inspection/QA procedure	
Interfacial component inspection/QA procedure	
4. Assembly specification	
Mill make-up procedure	Document revision and date
Field running procedure	
Connection repair procedure	
Sample make-up curves (Note 4)	Reference to make-up procedure
Note 1 - include applicable sub range of API grade specifications, if applicable.	
Note 2 - provide detail to the extent needed to perform evaluation tasks.	
Note 3 - production specifications must allow complete identification of the manufacturing process.	
Note 4 - curves must show torque-turn up to maximum achieved torque.	

The second group of specifications relates to the candidate connection’s schematic drawings. The schematic drawings shall contain sufficient amount of detail to enable execution of the TWCCEP evaluation tasks.

The third group of input specifications relates to the candidate connection’s manufacturing procedure. These specifications are required to uniquely identify the manufacturing process of the evaluated product, for later reference. The TWCCEP does not require provision of confidential design or manufacturing information.

The fourth group of candidate connection input specifications relates to connection assembly. The mill make-up and field running procedures and the connection repair procedure are provided for use in Task 4.1 Galling Resistance Test (14.3). Samples of make-up torque-turn curves are provided to verify accuracy of the candidate connection model in Task 2.2 Specimen Configuration Analysis (12.3.1).

11.4 Program options

In Task 1.3, the assigner (3.3) shall consider and select from the following program-execution options:

- a) Application severity level (3.2);
- b) Task 2.2.3 Seal Tapers – indicate if that analysis will be carried out in the evaluation program or not;
- c) Task 2.2.4.2 Box Yield Strength – indicate if that analysis will be carried out in the evaluation program or not, and if yield strength of the box material will be considered in determination of the biased test population;
- d) Task 2.2.6 Test versus Production – indicate if that analysis will be carried out in the evaluation program or not;
- e) Task 4.3 Bending Evaluation – indicate the selected scope of the bending evaluation: none, bending analysis only, bend test only, or both options;
- f) Task 4.4.1 Localized Strain Seepage – indicate if that test will be carried out in the evaluation program or not;
- g) Task 4.5 As-Tested Configuration Analysis – indicate if that analysis will be carried out in the evaluation program or not.

The assigner shall communicate the selected options to the supplier (3.39), the evaluator (3.18) and the inspector (3.23). The evaluator shall document all selected options in the evaluation report.

11.5 Data from prior evaluations

In Task 1.4, input of any prior evaluation data intended for use in the evaluation program shall be conducted as follows:

- a) source and contents of any existing data that is intended to be utilized in the current evaluation program as prior evaluation data shall be identified;
- b) conformance of that existing data to TWCCEP requirements for prior evaluation data shall be verified as stipulated in 8.5.

12 Determination of biased test population

12.1 Overall description

This Clause describes the second TWCCEP evaluation program block: determination of biased test population (see Figure 6). The main purpose of this block is to select those combinations of design variables and make-up torques that represent worst-case scenarios with respect to the assumed performance measures for the candidate connection. The selected combinations are subsequently used to derive specifications for the connection specimens to be manufactured for full-scale testing and for the target make-up torques to be applied upon specimen assembly for sealability tests. The secondary purpose of this block is to provide reference results for determination of load steps that will be applied in physical testing.

This program block consists of two tasks: Task 2.1 Initial Material Property Characterization (12.2), and Task 2.2 Specimen Configuration Analysis (12.3). Details of those two tasks are described in the following clauses. Implications of the front-end analysis results on decisions relative to procurement of the test specimens are also described.

To facilitate program execution, the material characterization task and the specimen configuration analysis can be performed in advance of the other evaluation tasks.

Material property specifications (for example, yield strength range) used for Task 2.1 and Task 2.2 shall be consistent with candidate connection specifications provided in Task 1.2 (11.3).

Prior evaluation data on material property characterization, specimen configuration and make-up torque analysis may be utilized in lieu of some or all subtasks of Task 2.1 and Task 2.2, if applicability of that prior evaluation data to the candidate connection and its conformance to TWCCEP requirements is demonstrated according to the provisions in 8.5. In such cases, prior evaluation data can be used, for example, to select specimen specifications and/or make-up torques for full-scale testing without conducting all material characterization and analysis cases required in Tasks 2.1 and 2.2.

Results of analyses conducted to determine specifications for the biased test population are not comparable with TWCCEP threshold performance requirements.

12.2 Initial material property characterization

12.2.1 Task description

Task 2.1 Initial Material Property Characterization is conducted to obtain reference material properties of the candidate connection pipe materials, including tubulars for pin components and coupling stock for box materials. The reference properties include tensile stress-strain response and thermal expansion coefficient. These properties are assessed by coupon-scale laboratory testing of samples representative of the connection-production materials, at temperatures spanning the selected ASL. In this document, such reference properties are called as-characterized material properties. The acquired as-characterized material properties are used to define constitutive material models for subsequent use in Task 2.2 Specimen Configuration Analysis (see 12.3.2).

Mechanical properties of pipe materials used for full-scale evaluation tests will in general not correspond to those of all of the pipes and couplings used in the field. Variability exists in material properties at both ambient and elevated temperatures. Analyses of connection models have shown that yield and post-yield material properties affect contact forces in premium connection seals, and thus variability in those properties can be expected to influence connection sealability in qualification tests and field use.

The TWCCEP provides the following procedure to account for variability in material properties of the pin and box components of the candidate connection. First, representative samples of the pin and box pipe materials are tested to obtain the as-characterized material properties (see 12.2.2, 12.2.3 and 12.2.4). Those as-characterized properties are used in Task 2.2 Specimen Configuration Analysis (12.3). Upon procurement of materials for the full-scale test specimens, conformance of their properties with requirements for the biased test population is verified by physical testing (13.2 and 13.3).

12.2.2 Testing conditions and scope

12.2.2.1 Stress-strain response

The stress-strain response of typical OCTG materials is known to depend on temperature and rate at which the material is strained. Evaluation of the temperature-dependence of the stress-strain material response is mandatory, unless existing material testing results are utilized as prior evaluation data. Since the purpose of this initial evaluation is to support subsequent specimen configuration analysis, and given the complexity and difficulty associated with evaluating rate-dependence, that aspect of the material evaluation is recommended but not required.

The following testing scope shall be conducted for representative samples of the pin and box components. At least one uniaxial tensile test shall be conducted at each of the following temperatures, up to the temperature corresponding to the selected ASL:

- 15°C to 35°C (ambient temperature)
- 180°C (transition temperature)
- 240°C (ASL-240)

- 290°C (ASL-290)
- 325°C (ASL-325)
- 350°C (ASL-350)

Circumferential variability in properties should be checked by conducting at least one additional test on a sample taken approximately 120° away (circumferentially) from the first sample. It is recommended that the circumferential variability test(s) be performed at 180°C. If a variation of more than 10 % is observed in the measured stress at the appropriate yield strain specified in ISO 11960 (typically 0.5 % or 0.6 %), similar tests should be conducted at each of the other test temperatures. For each temperature at which multiple tests are conducted, the resulting stress-strain curve that exhibits the lowest yield strength should be used as the as-characterized material description. If variability in test results is suspected to be an artefact of the testing system, further testing should be performed to determine the repeatability of the results.

[Table 9](#) summarizes the scope for Task 2.1 Initial Material Property Characterization, including the mandatory and recommended tensile tests for each ASL.

Table 9 — Scope of material characterization tensile tests

Application Severity Level	Mandatory tensile tests	Recommended circumferential consistency test(s)	Total number of tests = mandatory plus recommended
240°C	3 (ambient, 180°C, 240°C)	At least 1 test (recommended at 180°C)	4
290°C	4 (ambient, 180°C, 240°C, 290°C)		5
325°C	5 (ambient, 180°C, 240°C, 290°C, 325°C)		6
350°C	6 (ambient, 180°C, 240°C, 290°C, 325°C, 350°C)		7

12.2.2.2 Thermal expansion coefficient

In Task 2.1 Initial Material Property Characterization, the TWCCEP allows the average coefficient of thermal expansion (CTE_a) of each material to be determined according to one of the following methods, prior to commencing Task 2.2 Specimen Configuration Analysis:

- a) assume an average CTE_a of 14 $\mu\epsilon/^\circ\text{C}$, if it is considered representative of the pipe material over the temperature range corresponding to the selected ASL;
- b) quantify the thermal expansion coefficient over the temperature range corresponding to the selected ASL by laboratory tests as described for Task 3.2 Material Property Verification (13.3), and calculate an average value corresponding to that temperature range;
- c) use existing data and/or test results from a material sample if they are considered representative for the temperature range corresponding to the selected ASL;
- d) calculate CTE_a according to a temperature-dependent formula that is considered representative over the temperature range corresponding to the selected ASL.

The method for determination of CTE_a in Task 2.1 shall be selected by agreement between the assigner, the supplier and the evaluator. The same method shall be adopted for testing the pin material and the box material. The adopted method and the assumed and/or measured CTE_a value(s) shall be documented in the evaluation report.

As an example, in independent prior investigations the following temperature-dependent formula was derived for several carbon steel casing materials to determine an average thermal expansion coefficient between 5°C and an elevated temperature T , in which temperature T has Celsius units:

$$CTE_a = (10.94 + 0.00813 * T) * 10^{-6} / ^\circ\text{C}$$

Measurement of actual CTE_a of pipes used for manufacturing specimens for physical tests is addressed in [13.3.4](#).

12.2.2.3 Material strip specimens

The material strip specimens ([3.31](#)) for stress-strain characterization shall be longitudinal strip specimens cut from full-circumference “coupon” sections of the source pipe. Where practical, the material strip specimens should utilize a full-thickness rectangular cross-section or equivalent cylindrical or semi-cylindrical cross-section, and specimen geometry should be selected to satisfy the control and measurement requirements defined in [12.2.3](#). In the as-characterized evaluation, specimen properties will be interpreted as an indication of average mechanical response.

Relative circumferential locations of all material strip specimens shall be recorded as they are removed from the mother tubes. Where possible, all material strip specimens should be removed from the same cross-section. If this is not possible, extra strip specimens shall be extracted from an adjacent cross-section not more than 0.3 m (12 in) away, and from the same circumferential position. Material strip specimens manufactured from ERW tube should be extracted at least 90° from the weld centreline. For small-diameter tubes for which the above-recommended specimen spacing is not possible, the circumferential distance between the specimen locations and the weld centreline should be maximized.

12.2.3 Procedure for tensile tests

Tensile tests shall be conducted using testing procedures that meet ASTM specifications listed in [Clause 3](#) for ambient and elevated-temperature material mechanical property tests. It is recommended that specimen loading in the tests be conducted in a strain-control mode.

Strain in reduced section of each material strip specimen shall be measured with an extensometer to a strain of at least 2 %. It is recommended that the strain be measured by an extensometer up to a strain beyond the highest global strain attained in the candidate connection. If the extensometer data are not available to this strain level, stroke data gathered during the material test must be rigorously interpreted to provide a suitable estimate of the stress-strain response.

Example of strain-strain data to be acquired in the tensile tests are shown in [Figure 7](#). These results need to be further processed and interpreted in order to obtain material property input for modelling purposes. The result interpretation procedure is described in [12.2.4](#).

12.2.4 Interpretation and processing of tensile test results

12.2.4.1 Scope of result interpretation

Once testing results are obtained, they must be interpreted for subsequent use in Task 2.2. The following constitutive material descriptions are the product of this interpretation:

- as-characterized;
- minimum-yield;
- maximum-yield.

The as-characterized set is consistent with results of the conducted physical testing, for example those shown in [Figure 7](#). The minimum-yield set is meant to approximate results that would be obtained if tests were conducted on samples with the minimum ambient-temperature yield strength. Similarly, the maximum-yield properties represent an estimate of the properties that would be measured from

samples with the maximum ambient-temperature strength in the material's yield strength range. This range is typically defined by the API grade designation, but if a manufacturer certifies that the ambient-temperature yield strength range of its production material is smaller than the API range, then the maximum and minimum of the manufacturer's claimed yield range may be used instead of the maximum and minimum of the API range. If the connection configuration meets TWCCEP performance requirements through use of a non-standard yield strength range, close attention should subsequently be paid to the strength of field-installed tubulars to ensure the material strength remains within the range considered in the TWCCEP evaluation.

Ideally, the minimum-yield and maximum-yield constitutive descriptions should indicate the stress response of the material as a continuous function of strain and temperature. Such models are complex, particularly where cyclic behaviour occurs. As a minimum, the derived constitutive descriptions shall contain adequate detail to provide the monotonic stress-strain response of the material at each tensile-test temperature.

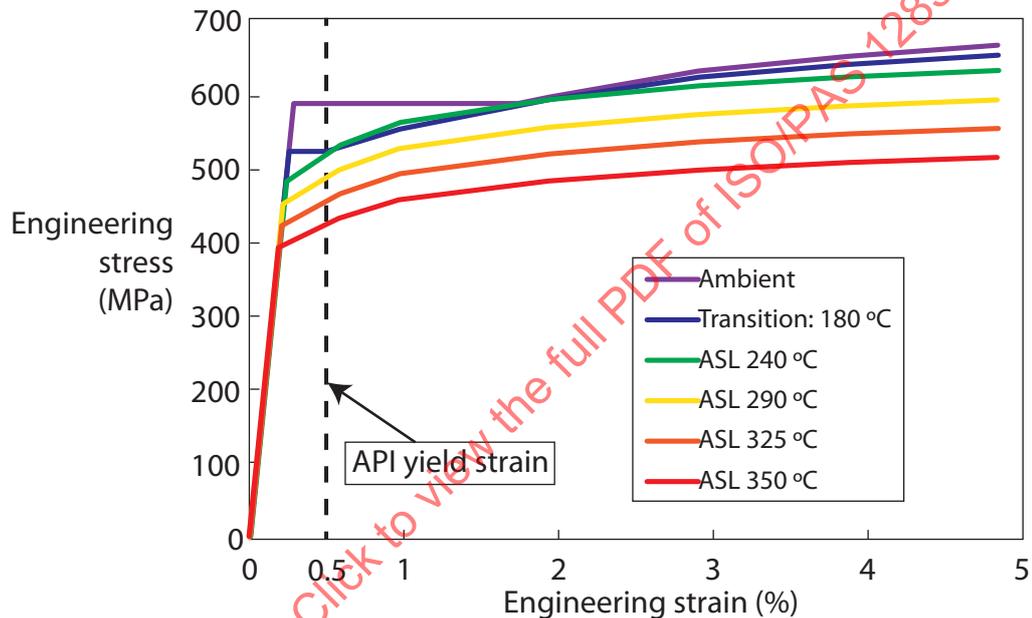


Figure 7 — Examples of as-characterized monotonic stress-strain curves

12.2.4.2 As-characterized constitutive model

Yield strengths derived from the material tests shall be tabulated and used to create a thermal degradation function that non-dimensionally describes strength variations with temperature. Yield strengths shall be determined from the measured stress at the yield strain specified by API for the material grade being tested.

For this purpose, the normalized yield strength is introduced and defined as:

$$\phi_{norm}^T = \frac{\sigma_y^T}{\sigma_y^{ambient}} \tag{1}$$

where

- $\sigma_y^{ambient}$ is the API yield strength at ambient temperature;
- σ_y^T is the API yield strength at a given elevated temperature;
- ϕ_{norm}^T is the normalized yield strength at the given elevated temperature.

The thermal degradation function consists of discrete points, where each point corresponds to the normalized yield strength calculated at a different testing temperature (see Figure 8 as an example).

The thermal degradation function for each material shall be assumed consistent for all analysis cases in Task 2.2 Specimen Configuration Analysis.

While it is recognized that material thermal degradation functions are not typically controlled in pipe production, the TWCCEP recommends that those factors be monitored whenever practical, so that material databases could be enhanced for use in tubular designs for high-temperature applications.

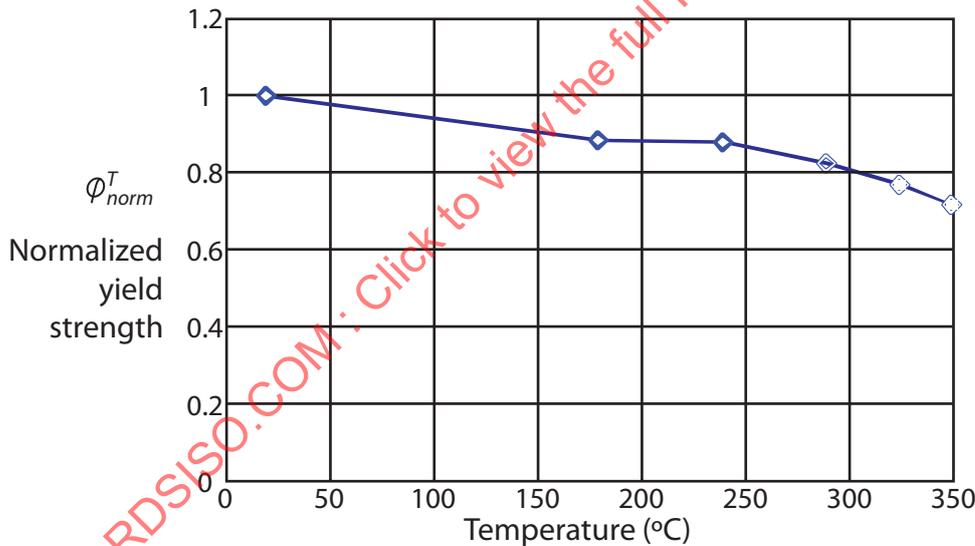


Figure 8 — Example of thermal degradation function

12.2.4.3 Minimum and maximum yield models at ambient temperature

Ambient-temperature properties shall be based on the post-yield stress progression derived from the as-characterized property set, and the specified yield strength at the corresponding minimum or maximum yield for the candidate connection pipe material.

The ambient-temperature stress-strain curves for the minimum-yield and maximum-yield descriptions shall be created using the following guidelines:

- a) Determine the elastic modulus from the as-characterized ambient-temperature test data. The minimum and maximum yield strength curves shall have the same elastic modulus as the as-characterized curve at ambient temperature.

- b) For the as-characterized material curve, determine the stress and strain at which the response departs from the linear elastic response. This point on the stress-strain curve is commonly known as the proportional limit. Note that the proportional limit might be different from the yield strength.
- c) Reduce the provided set of data points to an efficient size, while ensuring that the curve remains representative of the material behaviour. In areas of the curve where the slope is changing considerably, a minimum suggested density of readings is 0.1 % strain per point.
- d) Translate each of the readings on the stress-strain curve beyond the proportional limit on the as-characterized curve along the slope of the elastic modulus so that the stress at the API yield strain is equal to the minimum-yield strength (as defined in 12.2.4.1). The set of translated points will be used to represent the post-proportional-limit stress-strain response of the minimum-yield curve.
- e) The points preceding the proportional limit of the minimum-yield curve shall constitute the elastic region of the curve, and thus should follow the elastic modulus of the as-characterized curve as calculated in Step 1.
- f) Translate each of the readings, on the stress-strain curve beyond the proportional limit on the as-characterized curve, along the slope of the elastic modulus so that the stress at the API yield strain is equal to the maximum-yield strength (as defined in 12.2.4.1). The set of translated points will be used to represent the post-proportional-limit stress-strain response of the maximum-yield curve.
- g) The points preceding the proportional limit of the maximum-yield curve shall constitute the elastic region of the curve, and thus should follow the elastic modulus of the as-characterized curve as calculated in Step 1.

Figure 9 shows an example of the as-characterized, minimum-yield, and maximum-yield curves at ambient temperature.

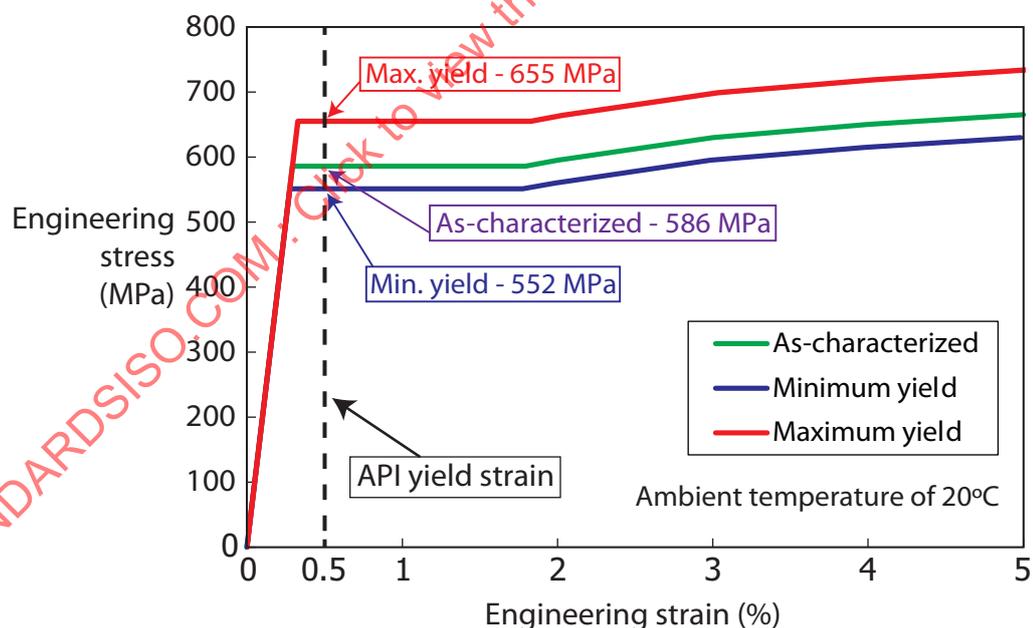


Figure 9 — Example ambient-temperature material properties

12.2.4.4 Minimum and maximum yield models at elevated temperatures

Elevated-temperature properties shall be based on the thermal degradation function and post-yield stress progression derived from the as-characterized property set, and the specified yield strength at the corresponding minimum or maximum yield limit for the candidate connection pipe material.

For each elevated temperature, stress-strain curves for the minimum-yield and maximum-yield descriptions shall be created using the following guidelines:

- a) Determine the elastic modulus from the as-characterized elevated-temperature test data. The minimum and maximum yield strength curves shall have the same elastic modulus as the as characterized curve at the specified elevated temperature.
- b) For the as-characterized elevated-temperature material curve, determine the stress and strain at which the response departs from the linear elastic response (proportional limit).
- c) Reduce the provided set of data points to an efficient size, while ensuring that the curve remains representative of the material behaviour. In areas of the curve where the slope is changing considerably, a minimum suggested density of readings is 0.1 % per point.
- d) Evaluate the thermal degradation function at the specified temperature and apply it to the minimum yield strength of the material at ambient temperature to obtain the stress at the API yield strain for the minimum-yield elevated-temperature curve. This stress will be referred to as the minimum-yield strength of the elevated-temperature curve.
- e) Translate the points beyond the proportional limit on the as-characterized elevated-temperature curve along the slope of the elastic modulus so that the stress at the API yield strain is equal to the minimum-yield strength of the elevated-temperature curve. The set of translated points will be representative of the post-proportional-limit stress-strain response of the minimum-yield strength curve at the specified elevated temperature.
- f) The points preceding the proportional limit of the minimum-yield curve at the specified elevated temperature shall constitute the elastic region of the curve, and thus should follow the elastic modulus of the as-characterized elevated-temperature curve as calculated in Step 1.
- g) Evaluate the thermal degradation function at the specified temperature and apply it to the maximum yield strength of the material at ambient temperature to obtain the stress at the API yield strain for the maximum-yield elevated-temperature curve. This stress will be referred to as the maximum-yield strength of the elevated-temperature curve.
- h) Translate the points beyond the proportional limit on the as-characterized elevated-temperature curve along the slope of the elastic modulus so that the stress at the API yield strain is equal to the "maximum-yield strength of the elevated temperature curve. The set of translated points will be representative of the post-proportional-limit stress-strain response of the maximum yield strength curve at the specified elevated temperature.
- i) The points preceding the proportional limit of the maximum-yield curve at the specified elevated temperature shall constitute the elastic region of the curve, and thus should follow the elastic modulus of the as-characterized elevated temperature curve as calculated in Step 1.

Figure 10 shows an example of the as-characterized, minimum-yield, and maximum-yield curves at a selected elevated temperature of 240°C.

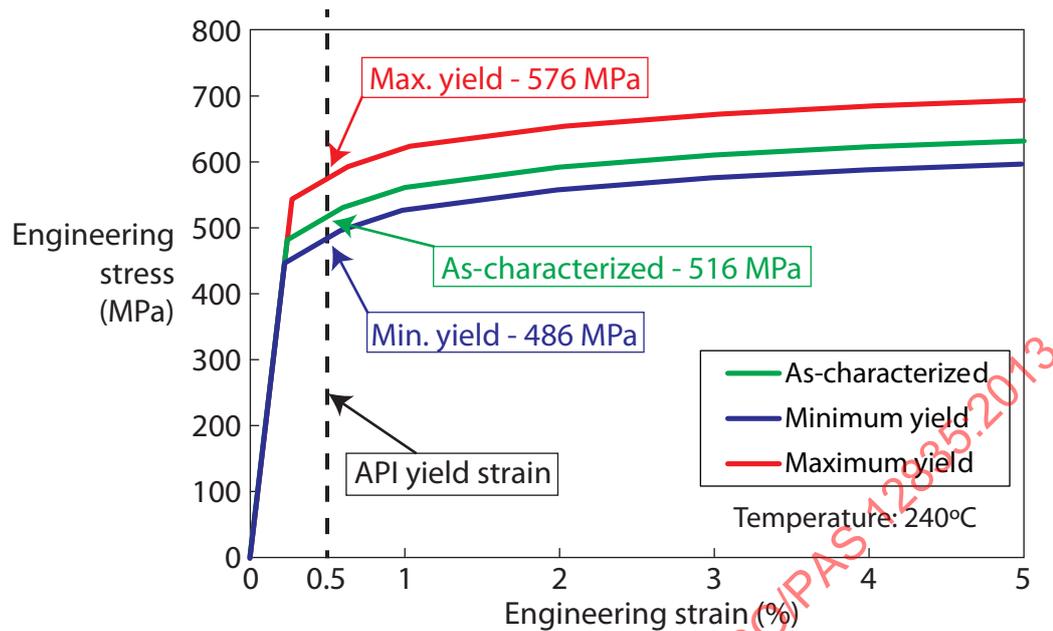


Figure 10 — Example ASL-240 material properties

12.3 Specimen configuration analysis

12.3.1 Task description

Task 2.2 Specimen Configuration Analysis is a parametric finite-element sensitivity study (FEA), which is conducted to:

- select worst-case combinations of geometric and material-property variables allowed by manufacturing tolerances of the candidate connection;
- select target torques from a specified range for make-up of the candidate connection specimens designated for sealability tests;
- determine equivalent low-stiffness and high-stiffness lengths for the candidate connection (formulas to determine the low-stiffness and high-stiffness lengths are provided in [Annex B](#)).

The worst-case combinations of manufacturing variables are assumed as follows:

- For galling resistance, the combinations that result in the highest peak contact stress between the connection pin and box components, either in the threads or in the seal.
- For sealability, the combination that results in the lowest contact stress intensity between the connection pin and box components in the connection primary seal.

The peak contact stress in the threads is defined as the highest normal stress that acts on any contact surface of the modelled pin or box threads (either complete or truncated threads). The peak contact stress in the seal is defined as the highest normal stress that acts on the contact surface of the connection primary seal.

The seal contact stress intensity is defined as the integral of the contact stress over the axial length of the seal region. In an axisymmetric case, this corresponds to the total contact force per unit length of the seal circumference (i.e. line load). This measure allows a comparison that is independent from the contact band width and the seal diameter. Higher contact stress intensity is associated with better sealing potential.

Task 2.2 Specimen Configuration Analysis consists of six subtasks:

- Task 2.2.1 Nominal Reference – all-nominal case to obtain a baseline reference response of the Candidate Connection ([12.3.3](#));
- Task 2.2.2 Specimen Geometry – identification of worst-case geometry configurations with respect to galling resistance and sealability ([12.3.4](#));
- Task 2.2.3 Seal Tapers – optional analysis to examine impacts of seal tapers ([12.3.5](#));
- Task 2.2.4 Material Properties – quantification of impacts of material property variations. This version of the TWCCEP provides guidance for evaluation of pin and box yield strengths ([12.3.6](#));
- Task 2.2.5 Make-up Torques – selection of worst-case make-up torques for sealability tests ([12.3.7](#));
- Task 2.2.6 Test versus Production – optional analysis to assess potential variations in sealability between “best” test specimens and “worst” production specimens ([12.3.8](#)).

Execution of Tasks 2.2.1, 2.2.2 and 2.2.5 is mandatory. In Task 2.2.4, evaluation of pin yield strength is mandatory, and evaluation of box yield strength is optional. Tasks 2.2.3 and 2.2.6 are optional.

In some evaluation programs, interim results might allow reduction of the analysis scope; for example, when the same geometry configuration corresponds to worst-case scenarios under multiple loading conditions ([12.3.4](#)); or when multiple make-ups do not produce incremental plastic deformation ([12.3.7](#)).

Results of the above analyses fall into two categories: input for subsequent tasks and auxiliary performance data.

The following clauses describe the required and recommended analysis scopes and procedures for result interpretation.

12.3.2 Modelling and reporting requirements

The analysis to be performed in Task 2.2 requires use of an axisymmetric finite-element model of the candidate connection. All analysis cases in Task 2.2 shall be performed in accordance with the modelling guidelines provided in [Annex A](#).

It is recognized that the complexity of the FEA model development, combined with the diversity of available modelling tools and choices, introduces a sensitivity of the FEA results with respect to the modelling assumptions. In the event that execution of an evaluation program requires additional modelling assumptions outside of the scope addressed in [Annex A](#), those additional assumptions shall be agreed on by the assigner, the supplier and the evaluator and documented in the evaluation report.

Modelling results shall be reported according to general reporting requirements stipulated in [15.2](#) and [A.2.8](#), and specific per-task requirements indicated in the following sub-clauses.

12.3.3 Nominal reference case

The nominal-reference analysis (Task 2.2.1) shall be conducted to establish a baseline structural response of the candidate connection. Two primary objectives of this analysis are as follows:

- Determination of design-specific equivalent low-stiffness length and equivalent high-stiffness length in a threaded pin-box interval of a made-up connection. These lengths shall be used as input for the formulas determining strain compensations to be applied in the thermal cycle test ([14.4.5](#) and derivations in [B.1](#));
- Calculation of seal contact stress intensity for the candidate connection’s nominal configuration, for later study of its sensitivity to configuration variations.

Connection geometry for the nominal reference case shall be per the supplier's target dimensions for manufacturing the candidate connection. In particular, nominal values for the following dimensions shall be used:

- thread diameter;
- thread taper;
- seal diameter;
- seal taper.

Pipe diameter and wall thickness of the mother pipes shall correspond to nominal values specified by ISO 11960.

The constitutive material model shall be configured to be representative of the as-characterized material property set (per [12.2](#)).

Only one analysis case is required in Task 2.2.1. The load path for that analysis case shall consist of one connection make-up and one thermal cycle between the ASL's lower-bound temperature and upper-bound temperature (this load path is described in [Annex A](#)).

Results of primary interest that shall be retained for comparison with sensitivity analysis and documented in the evaluation report are:

- equivalent low-stiffness and high-stiffness lengths in the threaded pin-box interval (see formulas in [B.1.3](#));
- thread contact stress distribution (including peak contact stress);
- seal contact stress distribution (including peak contact stress);
- seal contact stress intensity.

The equivalent low-stiffness and high-stiffness lengths shall be calculated at the end of the thermal cycle. Thread and seal peak contact stress shall be calculated and reported at full make-up. Seal contact stress intensity shall be calculated and reported at full make-up, at maximum temperature during the thermal cycle, and at the end of the thermal cycle.

12.3.4 Worst-case geometry configurations

This clause describes the analysis (Task 2.2.2) that shall be conducted to identify worst-case geometry configurations of the candidate connection with respect to galling resistance and sealability (as defined in [12.3](#)) for subsequent use in specifications for the full-scale test specimens. [Table 10](#) summarizes the worst-case tolerance combinations and corresponding codes used to specify the specimen geometry configurations.

Table 10 — Worst-case geometry configurations and codes

Combination of tolerances	Code
Worst-case for galling in seal	WGS
Worst-case for galling in threads	WGT
Worst-case for sealability in tension at low temperature	WST
Worst-case for sealability in compression at high temperature	WSC

The worst-case geometry configurations are defined in terms of pin-box diametric interference in seal, pin-box diametric interference in threads, and pin-and-box thread tapers (refer to [6.4.3](#) for interference and taper definitions). Inclusion of seal tapers in the worst-case geometry configurations is optional ([12.3.5](#)).

[Table 11](#) summarizes the interference and thread taper tolerance combinations and corresponding codes used to specify the geometry configurations for the test specimens. Each specified pin-box diametric interference is either minimum or maximum, and each thread taper is either slow or fast. The minimum and maximum interference values refer, respectively, to the minimum and maximum diametric interferences that result from candidate connection manufacturing tolerances for pin and box diameters assuming nominal tapers. Slow/fast tapers refer to extreme taper combinations allowed by candidate connection manufacturing tolerances for the pin and box components, where “slow” corresponds to the minimum taper angle and fast corresponds to the maximum taper angle (also see [Figure 15](#)).

Table 11 — Interference and taper tolerance combinations and codes

Pin-box diametric interference	
Description	Code
Minimum interference	Min.
Maximum interference	Max.
Thread tapers	
Description	Code
Slow pin/fast box	PS/BF
Fast pin/slow box	PF/BS

[Table 12](#) illustrates the procedure to determine which interference and taper tolerance combinations from the set identified in [Table 11](#) will result in the worst-case scenarios with respect to galling resistance and sealability, as identified in [Table 10](#).

In Step 1, eight analysis cases shall be run for different combinations of seal and thread interferences and thread tapers. In those cases, the constitutive models for the pin and box materials shall be based on material properties of the production sample tested as described in [12.2](#). Load path for analysis cases 1 to 4 consists of connection make-up to nominal torque and one thermal cycle corresponding to the selected ASL (see load sequence specified in [Annex A](#)). Load path for analysis cases 5 to 8 consists of only one connection make up to nominal torque.

In Step 2, the results of the analyses conducted in Step 1 are used to examine contact stress conditions in the connection primary seal and thread areas. Galling susceptibility in the threads and seal shall be assessed based on peak contact stress in, respectively, the threads and seal area; unless otherwise agreed by the assigner, the supplier and the evaluator. Assessment of sealability potential shall be based on the seal contact stress intensity upon make-up, under maximum compression at the maximum operating temperature (upper-bound temperature), and under maximum tension at the end of the thermal cycle (lower-bound temperature).

In Step 3, the contact stress conditions determined in Step 2 are compared to determine relative severity rankings, and to identify which analysis cases resulted in the highest and lowest severity with respect to galling susceptibility and sealability. For cases where the calculated contact stress measures (peak or intensity) vary less than 5 % of the targeted highest or lowest measure (whichever applies) for various interference and taper combinations, engineering judgement should be used to select the interference and taper combinations for the test specimens, by agreement between the assigner, the supplier and the evaluator.

In Step 4, the interference and taper combinations corresponding to the analysis cases selected in Step 3 are assigned to geometry configurations WGS, WGT, WST, and WSC, which are subsequently prescribed for the test specimens (as listed in [Table 10](#)). The prescribed interference shall be either “minimum interference” or “maximum interference”. The prescribed taper combination shall be either “PS/BF” or “PF/BS”.

For some connection designs, the severity ranking of seal contact stress intensity might be consistent throughout the thermal cycle, i.e. the tolerance combination that results in the lowest contact stress

intensity at the upper-bound temperature might be the same as the tolerance combination that results in the lowest contact stress intensity at the lower-bound temperature. If that is the case, then the above single tolerance combination shall be selected for both WST and WSC configurations, and the analysis prescribed in the following clauses shall be executed only for that single tolerance combination. If the intensity ranking is different at the low and high temperatures, then the WST and WSC configurations shall have different tolerance combinations.

Table 12 — Determination of worst case geometry configurations

Case	Tolerance combinations			Load path	Contact stress condition			
	Interference		Taper		Peak	Intensity		Peak
	Seal	Threads	Threads		Seal			Threads
	Seal	Threads	Threads		Upper-bound temp.	Lower-bound temp.	Make-up	
As-characterized material properties	Step 1 - Analysis				Step 2 - Result summary (Note 1)			
	1	Min.	Min.	PS/BF	Make-up + 1 cycle			
	2			PF/BS				
	3		Max.	PS/BF				
	4			PF/BS				
	5	Max.	Min.	PS/BF	Make-up			
	6			PF/BS				
	7		Max.	PS/BF				
8	PF/BS							
Step 4 - Geometry configuration (Note 3)					Step 3 - Severity ranking (Note 2)			
WGS					Highest			
WGT								Highest
WST							Lowest	
WSC						Lowest		

Note 1 Green fields to be filled based on contact stress conditions at respective locations

Note 2 Severity ranking based on results summarized in Step 2

Note 3 Seal and thread interferences (min. or max.) and thread tapers (slow or fast) selected as per severity ranking obtained in Step 3.

12.3.5 Seal taper analysis

Execution of the seal taper analysis (Task 2.2.3) is optional at the assigner’s discretion. The decision to conduct or not to conduct the seal taper analysis shall be documented in the evaluation report.

If the seal taper analysis is executed, its implications might or might not prompt additional specifications for the test specimens. The assigner and the supplier shall consider the implications of the seal taper analysis results, and agree on any supplementary specimen specifications. In either case, execution of the seal taper analysis and its results shall be documented in the evaluation report.

The term “seal rocking” refers to the movement of the seal contact location due to local relative rotation of the seal surfaces associated with through-wall bending of the pin and box components. In general,

seal rocking occurs both during connection make-up and during thermal service operations. “Seal rock-through” refers to seal rocking of sufficient magnitude to reduce the contact stress in the intended zone of contact to zero or nearly zero, and move the zone of major contact stress to a different location, as illustrated in [Figure 11](#). Physical tests of premium connection seals have demonstrated that poor seal performance can be expected if seal rock-through occurs, regardless of the seal contact intensity.

In general, variations of seal tapers influence contact stress distribution in the seal area, including the potential for seal rock-through and changes in connection sealability. The magnitude of that impact is design-specific and configuration-specific (e.g. different sensitivities can be expected for cone-on-cone, cone-on-toroid, and other pin-box configurations).

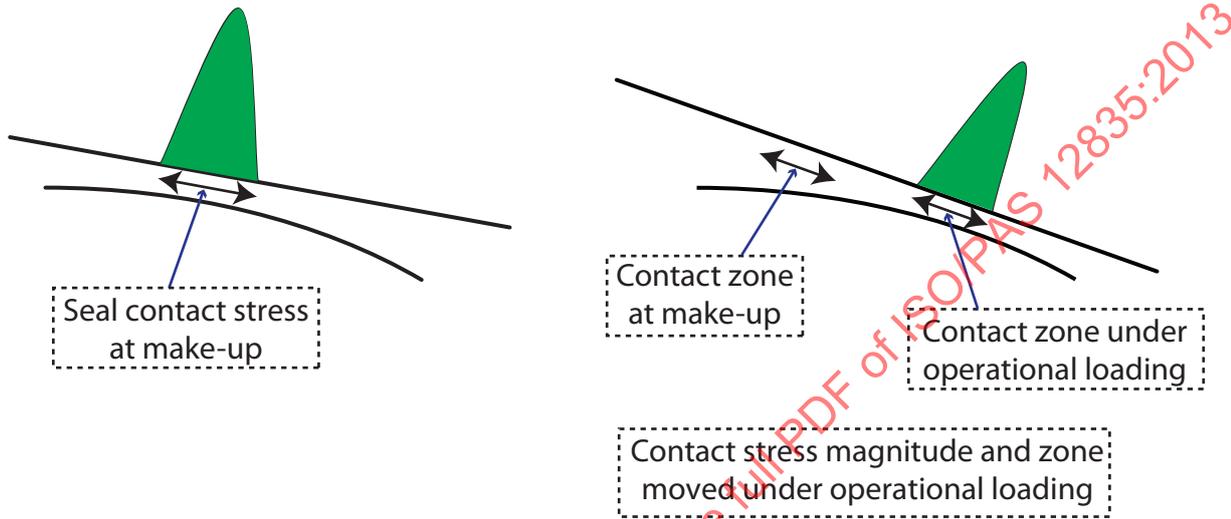


Figure 11 — Illustration of seal rock-through

The TWCCEP does not require biasing of seal tapers because of challenges expected with machining seal tapers within a reduced (biased) tolerance range and subsequent seal taper verification measurements (gauging).

The recommended seal taper analysis should assess impacts of seal taper variations on contact stress conditions in the seal area. For example, for cone-on-cone configurations, two analysis cases should be run to examine impacts of extreme seal taper variations: one case with a slow pin taper and a fast box taper, and another case with a fast pin taper and a slow box taper. This sensitivity should be based on the WST geometry configuration, as determined in the analysis described in [12.3.4](#). Comparison with nominal geometry can be used to estimate the severity of the changes caused by the taper variations.

The modelling approach for the seal taper analysis should satisfy requirements outlined in [Annex A](#).

12.3.6 Impacts of material property variations

12.3.6.1 Task scope

This clause describes an analysis (Task 2.2.4) to quantify potential impacts of material property variations on the candidate connection sealability, and to select the range of material properties allowable for the full-scale test specimens. In general, if the analysis results show that material property variations might have a significant impact on seal contact stress, then the range of material properties allowed for the test samples is biased to those properties that lead to worst-case combinations of the material variables. If no significant impact of the material variables is identified, the samples can be procured from any production-series pipe that has properties within the range allowed by production specifications for the candidate connection.

Task 2.2.4 contains two subtasks for determining impacts of the following material properties:

- yield strength of the pin material – mandatory Task 2.2.4.1, see [12.3.6.2](#);
- yield strength of the box material – optional Task 2.2.4.2, see [12.3.6.3](#).

[Table 13](#) summarizes the yield strength variations and corresponding codes used to specify the material properties in the constitutive models. The minimum and maximum yield strength values denote, respectively, the minimum and maximum yield strength allowed by production specifications for the candidate connection pin or box material.

Table 13 — Yield strength variations and codes

Yield strength	
Description	Code
Minimum strength	Min.
Maximum strength	Max.

12.3.6.2 Pin yield strength

Determination of impacts of pin yield strength variation (Task 2.2.4.1) is mandatory. [Table 14](#) illustrates the procedure to determine whether variation of the pin yield strength within the candidate connection's production range can be expected to have a significant impact on the seal contact stress.

In Step 1, four analysis cases shall be run for different combinations of connection geometry configuration and pin yield strength; except if WST and WSC configurations are the same, then only two analysis cases shall be run. The constitutive model for the pin material shall be based on the case-specific yield strength and the post-yield characteristic assumed as per [12.2](#). The constitutive model for the box material shall be based on material properties of the production pipe sample tested as described in [12.2](#), unless otherwise agreed by the assigner and the supplier. The load path for analysis cases consists of one connection make-up to nominal torque and one thermal cycle corresponding to the selected ASL.

In Step 2, the results of the analyses conducted in Step 1 are used to assess contact stress conditions in the connection primary seal. Seal contact stress intensity shall be used to assess the connection sealability potential upon make-up and at various stages of the thermal cycle. For each analysis case, the stress intensity shall be calculated at the upper-bound temperature and the lower-bound temperature.

In Step 3, average intensity and intensity variance are calculated separately for each connection geometry configuration (i.e. separately for WST and WSC) at each temperature (according to the formulas indicated in [Table 14](#)). The largest of the four variances calculated is taken as the maximum intensity variance that can be expected due to pin yield strength variation.

In Step 4, the maximum intensity variance calculated in Step 3 is compared against a set of criteria in order to determine the significance of the pin yield strength variation and to decide whether the selection of tubulars for the pipe body components of the test specimens needs to be restricted:

- If the maximum intensity variance is less than 15 %, then selection of the pin material is not restricted. The pin components can be made from any pipe that has yield strength within the production specifications.
- If the maximum intensity variance is between 15 % and 30 %, then selection of the pin material shall be restricted to half of the range allowed for the yield strength by production specifications. The two contact stress intensities that gave the maximum intensity variance in Step 3 shall be used to specify the restricted production range. If the lower contact stress intensity corresponds to the minimum yield strength assumed in the constitutive model, then the test sample material shall have a yield strength within the lower half of the ambient-temperature production range. Conversely, if the lower contact stress intensity corresponds to the maximum yield strength assumed in the constitutive model, then the test sample material shall have a yield strength within the upper half of the ambient-temperature production range.

- If the maximum intensity variance is larger than 30 %, then selection of the pin material shall be restricted to one-third of the range allowed for the yield strength by production specifications. The two contact stress intensities that gave the maximum intensity variance shall be used to specify the restricted production range. If the lower contact stress intensity corresponded to the minimum yield strength assumed in the constitutive model, then the test sample material shall have a yield strength within the lowest one-third of the ambient-temperature production range. Conversely, if the lower contact stress intensity corresponds to the maximum yield strength assumed in the constitutive model, then the test sample material shall have a yield strength within the highest one-third of the ambient-temperature production range.

Table 14 — Determination of allowable yield strength range for pin components

Case	Tolerances		Load path	Seal contact stress intensity	
	Geometry	Pin yield strength		ASL upper-bound temperature	ASL lower-bound temperature
Step 1 - Analysis				Step 2 - Result summary - Note 1	
1	WST	Min.	Make-up + 1 cycle	Green	Green
2		Max.			
3	WSC	Min.		Grey	Grey
4		Max.			
Average = (Highest + Lowest)/2				Average	Average
Variance = (Highest - Lowest)/Average (%)				Variance	Variance
				Maximum intensity variance	
Step 3 - Severity ranking - Note 2					
Step 4 - Selection of material property range					
Maximum intensity variance (%)		Allowable yield strength range		Selection	
		% of production range			
less than 15		100		Unrestricted	
between 15 and 30		50		Restricted to subrange with lowest intensity	
more than 30		33			

Note 1 Green fields to be filled based on contact stress intensity at respective locations

Note 2 Severity ranking based on results summarized in Step 2

The following pin yield strength shall be assumed for subsequent analyses in Task 2.2.4.2 (12.3.6.3) and Task 2.2.5 (12.3.7):

- If selection of the pin material for the test samples is unrestricted based on the results of the analysis conducted in this Task 2.2.4.1, the constitutive model for the pin material shall be based on the as characterized properties of the production pipe sample tested per 12.2;
- If selection of the pin material for the test samples is restricted based on the results of the analysis conducted in this Task 2.2.4.1, the constitutive model for the pin material shall be assumed as follows:

- the median yield strength of the restricted production range; and
- the post-yield characteristic assumed as per [12.2](#).

12.3.6.3 Box yield strength

Determination of potential impacts of box yield strength variation (Task 2.2.4.2) is optional at the assigner's discretion, and only needs to be considered for threaded-and-coupled connections where the box (coupling) material is normally manufactured separately from the pin (pipe) material. The decision to conduct or not to conduct the box yield strength analysis shall be documented in the evaluation report.

If Task 2.2.4.2 is not conducted, constitutive model for the box material shall be based on material properties of the production sample tested as described in [12.2](#).

[Table 15](#) illustrates the procedure to determine whether variation of the box yield strength within the candidate connection's production range can be expected to have a significant impact on the seal contact stress. The procedure parallels that outlined in [12.3.6.2](#) to evaluate the impact of pin yield strength on seal contact stress.

In Step 1, four analysis cases shall be run for different combinations of connection geometry configuration and box yield strength; except if WST and WSC configurations are the same, then only two analysis cases shall be run. The constitutive model for the box material shall be based on the case-specific yield strength and the post-yield characteristic assumed as per [12.2](#), unless otherwise agreed by the assigner and the supplier. The constitutive model for the pin material shall be assumed as per [12.3.6.2](#). The load path for analysis cases consists of one connection make-up to nominal torque and one thermal cycle corresponding to the selected ASL.

In Step 2, the results of the analyses conducted in Step 1 are used to assess contact stress conditions in the connection primary seal. Seal contact stress intensity shall be used to assess the connection sealability potential upon make-up and at various stages of the thermal cycle. For each analysis case, the stress intensity shall be calculated at the upper-bound temperature and the lower-bound temperature.

In Step 3, average intensity and intensity variance are calculated for each connection geometry configuration at each temperature (according to the formulas indicated in [Table 15](#)). The largest of the four variances calculated is taken as the maximum intensity variance that can be expected due to box yield strength variation.

In Step 4, the maximum intensity variance calculated in Step 3 is compared against a set of criteria in order to determine the significance of the box yield strength variation and to decide whether the selection of tubulars for the box test specimens needs to be restricted.

- If the maximum intensity variance is less than 15 %, then selection of the box material is not restricted. The box specimens can be made from any coupling stock that has yield strength within the production specifications.
- If the maximum intensity variance is between 15 % and 30 %, then selection of the box material shall be restricted to half of the range allowed for the yield strength by production specifications. The two contact stress intensities that gave the maximum intensity variance in Step 3 shall be used to specify the restricted production range. If the lower contact stress intensity corresponds to the minimum yield strength assumed in the constitutive model, then the test sample box material shall have a yield strength within the lower half of the ambient-temperature production range. Conversely, if the lower contact stress intensity corresponds to the maximum yield strength assumed in the constitutive model, then the test sample box material shall have a yield strength within the upper half of the ambient-temperature production range.
- If the maximum intensity variance is larger than 30 %, then selection of the box material shall be restricted to one-third of the range allowed for the yield strength by production specifications. The two contact stress intensities that gave the maximum intensity variance in Step 3 shall be used to specify the restricted production range. If the lower contact stress intensity corresponds to the minimum yield strength assumed in the constitutive model, then the test sample box material

shall have a yield strength within the lowest one-third of the ambient-temperature production range. Conversely, if the lower contact stress intensity corresponds to the maximum yield strength assumed in the constitutive model, then the test sample box material shall have a yield strength within the highest one-third of the ambient-temperature production range.

Table 15 — Determination of allowable yield strength range for box components

Case	Tolerances		Load path	Seal contact stress intensity	
	Geometry	Box yield strength		ASL upper-bound temperature	ASL lower-bound temperature
Step 1 - Analysis				Step 2 - Result summary - Note 1	
1	WST	Min.	Make-up + 1 cycle		
2		Max.			
3	WSC	Min.			
4		Max.			
Step 3 - Severity ranking - Note 2					
Average = (Highest + Lowest)/2				Average	Average
Variance = (Highest - Lowest)/Average (%)				Variance	Variance
				Maximum intensity variance	
Step 4 - Selection of material property range					
Maximum intensity variance (%)		Allowable yield strength range		Selection	
		% of production range			
less than 15		100		Unrestricted	
between 15 and 30		50		Restricted to subrange with lowest intensity	
more than 30		33			

Note 1 Green fields to be filled based on contact stress intensity at respective locations

Note 2 Severity ranking based on results summarized in Step 2

12.3.7 Make-up torque for sealability tests

This Clause describes the analysis that shall be conducted to select target torques for final make-up of the candidate connection specimens designated for sealability tests (Task 2.2.5). The objective of this analysis is to select those torques from the range allowed by the Supplier, which will result in the lowest contact stress intensity in the seal area – so that the sealability tests are based on conservative scenarios with respect to connection make-up. While in some cases the lowest torque might seem to be a reasonable and conservative target, counterintuitive results were obtained in some connection evaluation programs for thermal well applications – which prompted introduction of this analysis in the TWCCEP scope.

Table 16 summarizes the make-up torque variations and corresponding codes used to specify the torque selections. The minimum and maximum torque values denote, respectively, the minimum and maximum torque allowed by the supplier’s make-up procedure for the candidate connection.

Table 16 — Torque variations and codes

Make-up torque target	
Description	Code
Minimum torque	Min.
Maximum torque	Max.

[Table 17](#) illustrates the procedure to determine the final make-up torque that shall be used for assembly of specimens for sealability tests. The scope of the analysis assumes that specimens with all geometry configurations listed in [Table 10](#) might be subjected to sealability tests, even though sealability tests of some of those configurations are optional. The rationale for such choice is to gain understanding of connection performance at a relatively low incremental cost of the associated analyses.

In Step 1, several analysis cases shall be run for different combinations of connection geometry configurations. The default number of cases is 12, but that number may be reduced by agreement between the assigner, the supplier and the evaluator, if it is demonstrated that no incremental plasticity occurs in the connection seal upon break-out and/or second make-up to the same torque, in which case the reduction of the analysis scope might apply to cases 2, 4, 6, and 10. If geometry configurations WSC and WST are the same, the number of cases shall be reduced correspondingly.

The constitutive model for the pin and box materials shall be based on the yield strength selected in Task 2.2.4.1 ([12.3.6.2](#)) and Task 2.2.4.2 ([12.3.6.3](#)). The load path for analysis cases 7, 8, 11 and 12 consists of a single make-up to a case-specific torque and one thermal cycle corresponding to the selected ASL. The load path for all other analysis cases consists of two consecutive make-ups to case-specific torques separated by a zero-load (zero-interference) step simulating a break-out, and one thermal cycle corresponding to the selected ASL.

Table 17 — Determination of torque for make-up of sealability test specimens

Step 1 - Analysis				Step 2 - Result summary	Step 3 - Severity ranking	Step 4 - Final torque selection	
Case	Geometry config.	Load path	Torque target		Seal contact stress intensity (Note 1)	Lowest intensity in each pair	Min. or Max.
			1st make-up	2nd make-up			
1	WGS	2 make-ups + 1 cycle	Max.	Min.		Lowest from cases 1 and 2	TF(WGS)
2			Max.	Max.			
3	WGT	2 make-ups + 1 cycle	Max.	Min.		Lowest from cases 3 and 4	TF(WGT)
4			Max.	Max.			
5	WST	2 make-ups + 1 cycle	Max.	Min.		Lowest from cases 5 and 6	TF(WST-M)
6			Max.	Max.			
7	WST	1 make-up + 1 cycle	Min.			Lowest from cases 7 and 8	TF(WST-S)
8			Max.				
9	WSC	2 make-ups + 1 cycle	Max.	Min.		Lowest from cases 9 and 10	TF(WSC-M)
10			Max.	Max.			
11	WSC	1 make-up + 1 cycle	Min.			Lowest from cases 11 and 12	TF(WSC-S)
12			Max.				

Note 1 Green fields to be filled based on contact stress intensity at cycle end

In Step 2, the results of the analyses conducted in Step 1 are used to illustrate contact stress conditions in the connection primary seal. Similarly as in 12.3.4 and 12.3.6, seal contact stress intensity at cycle end shall be adopted as a representative indicator of connection sealability.

In Step 3, the contact stress intensities determined in Step 2 are compared to determine the case that resulted in the lowest intensity within each pair of analysis cases conducted on the same geometry configuration and make-up sequence.

In Step 4, the final make-up torques associated with the cases determined in Step 3 are selected as targets TF(XXX) for the final make-ups of the specimens for the sealability tests, where TF(XXX) targets will be either “minimum torque” or “maximum torque” allowed by the Supplier’s make-up procedure. For the WST and WSC geometry configurations, the target torques are either TF(XXX-S) or TF(XXX-M), which respectively correspond to the target torques for either single-make-up specimens or multiple-make-up specimens.

12.3.8 Test versus production specimens

Execution of the test-versus-production analysis (Task 2.2.6) is optional at the assigner’s discretion. The decision to conduct or not to conduct this analysis shall be documented in the evaluation report.

If the test-versus-production analysis is carried out, execution of that analysis and its results shall be documented in the evaluation report. The assigner shall agree with the supplier whether the results of this analysis should be used to derive additional specifications for the test specimens.

The test-versus-production analysis examines variations that can be expected in a candidate connection’s performance due to differences between the worst-case configurations possible within its manufacturing tolerances (worst production connection) and the best-case configurations possible within the machining specifications allowed for the biased test population (best test specimen). In this Clause, the best and worst scenarios are interpreted in the context of the predicted connection sealability; i.e. the best and worst scenarios are those with, respectively, the highest and the lowest seal contact stress intensity.

The objective of this analysis is to provide an indication of the sensitivity of seal contact stress intensity to possible geometric, material, and make-up variations within the range allowable for TWCCEP specimens. If the seal contact stress intensity for the best biased test specimen is similar to that for the worst production connection, then all test specimens can reasonably be considered representative of the worst-case production connections. If the seal contact stress intensity for the best biased test specimen is significantly higher than for the worst production connection, then some test specimens might not be representative of the worst-case production connections. This analysis is viewed as highly beneficial for the connection user and manufacturer, because its results can provide valuable insight into connection performance boundaries, and facilitate decisions relative to production quality assurance and procurement quality verification.

For example, Figure 12 illustrates that a certain specimen parameter P (such as seal interference) might vary within the connection production specifications from P_{\min} to P_{\max} . The “worst-case” allowed by the production specifications might be at P_{\min} . In the test, that parameter can assume values in the minimum parameter range: between the lower-bound value and the upper-bound value (as shown in Figure 12). In this example, the test-versus-production analysis should compare the connection response at P_{\min} and at the upper-bound value of the minimum parameter range.

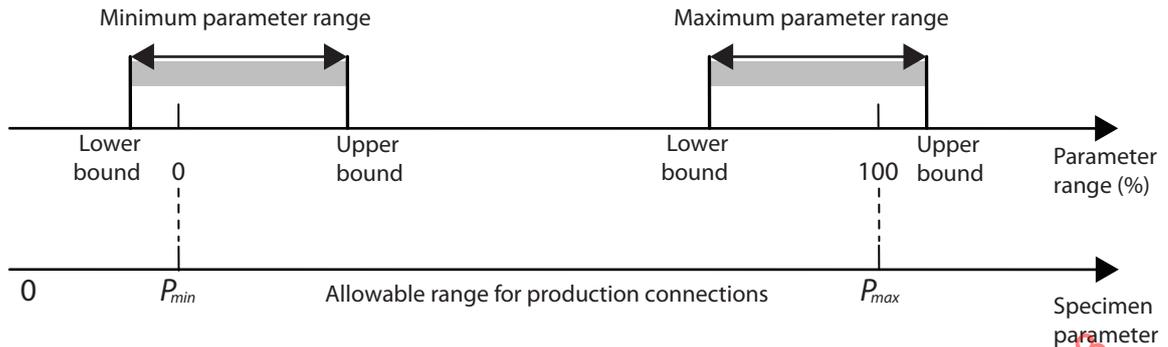


Figure 12 — Illustration of allowable parameter ranges for specimen components

Table 18 illustrates the procedure for determining the impacts of the test-specimen tolerances for two biased configurations for sealing (WSC and WST). If those configurations are the same, the number of required analysis cases shall be reduced correspondingly.

The seal interference, thread interference and thread taper in analysis cases 1 and 3 should be set to the WSC and WST configurations, respectively. The seal interference, thread interference, and thread taper in analysis cases 2 and 4 should be set to the opposite end of the corresponding allowable ranges for test specimens (13.4.6) of the respective configurations. For example, let the WSC configuration consist of minimum seal interference, maximum thread interference, and PF/BS thread taper. In case 2, the seal interference would be set to the upper bound of the minimum seal interference range (maximum interference allowed) for the test specimens. Similarly, the thread interference would be set to the lower bound of the maximum thread interference range (minimum interference allowed) for the test specimens. The pin thread taper would be set to the slowest value allowed for the test specimens and the box thread taper would be set to the fastest value allowed for the test specimens.

If impacts of seal tapers on the seal contact stress intensity are known based on prior evaluation data or results obtained in the optional Task 2.2.3, then seal tapers in cases 1 and 3 should be set to the configuration within production tolerances that provides the minimum seal contact intensity after make-up (note, depending on how the seal geometry is specified in the machine drawings, the minimum seal contact intensity could be obtained by either increasing or decreasing the seal taper); and seal tapers in analysis cases 2 and 4 shall be set to the configuration within production tolerances that provides the maximum seal contact intensity after make-up. If the impacts of the seal tapers on the seal contact stress intensity are unknown, they shall be set to nominal values.

Based on results acquired in Task 2.2.4 (12.3.6), the pin and box material yield strengths should be set as follows:

- analysis cases 1 and 3 – select the combination giving the minimum seal contact intensity;
- analysis cases 2 and 4 – select the combination giving the maximum seal contact intensity.

The above choices should be governed by the pin and box strength values at the temperature that governed the choice of pin yield strength in Task 2.2.4.1.

Table 18 — Determination of impact of test specimen tolerances

Step 1 - Analysis						Step 2 - Result summary			
Case	Interference		Taper		Pin yield strength	Load path & make-up torque	Seal contact stress intensity		
	Seal	Threads	Seal				Make-up	Upper-bound temp.	Lower-bound temp.
1	WSC		Worst		Worst	Worst			
2	WSC +/- specimen tolerances		Best		Best	Worst +/- make-up torque tolerance			
3	WST (may be the same as WSC)		Worst		Worst	Worst			
4	WST +/- specimen tolerances		Best		Best	Worst +/- make-up torque tolerance			

Note 1 Green fields to be filled based on contact stress intensity at respective load path locations

Note 2 Evaluation report should contain seal contact stress distributions along seal length at each load step

The load path (one make-up and one thermal cycle, or two make-ups and one thermal cycle) and make-up torque(s) in analysis cases 1 and 3 shall be set to provide minimum seal contact intensity at high and low temperatures, respectively, as determined in 12.3.7. The load paths in analysis cases 2 and 4 shall be the same as cases 1 and 3, respectively; however, the make-up torque(s) shall be set to the opposite end of the allowable ranges for test specimens (see make-up torque specifications in 14.3.6).

In Step 1, two to four different analysis cases shall be run for different combinations of connection geometry configurations.

In Step 2, the results of the analyses conducted in Step 1 are used to assess contact stress conditions in the connection primary seal. As in 12.3.6, seal contact stress intensity shall be used to assess the connection sealability potential upon make-up and at various stages of the thermal cycle. For each analysis case, the stress intensity shall be calculated at the ASL upper-bound temperature and lower-bound temperature.

13 Specimen procurement

13.1 Task description

This Clause describes the third program evaluation block, which deals with procurement and preparation of connection samples (specimens) for full-scale testing. The tasks in this program block cover procurement of specimen component pipes and verification of their material properties, specifications for specimen machining, specimen quality control and geometry verification (gauging), procurement of connection interfacial component(s), specimen handling and storage, and treatment of damaged specimens.

Six connection specimens shall be machined for full-scale testing. These specimens are numbered Specimen 1 to Specimen 6. Specimen numbering convention is associated with the specimen configuration and tolerances, which are explained in Table 19 and 13.4.4.

For threaded and coupled connections, one additional pin end with seal removed shall be provided to support open ends of couplings during make-up and break-out. This pin is referred to as the make-up support pin (3.29).

It is strongly recommended that one or more replacement specimens (spares) be machined for each test specimen configuration at the time when the test specimens are manufactured, and in accordance with the same procurement and machining guidelines as for the primary test specimens. It is acknowledged that the process of substituting spares for damaged or unusable specimens might become complex when a part being replaced, such as a coupling, affects more than one connection; or when a part being replaced, such as a pin-by-pin intermediate pup, affects more than one specimen (13.8.2).

Specifications for the test specimens, replacement spares, and make-up support pin are provided in the following Clauses.

13.2 Specimen pipe procurement

Pin components for the test specimens shall be machined from pipes with yield strengths that conform to the requirements included in 12.3.6.2 and Table 14.

For threaded-and-coupled connections, if the optional Task 2.2.4.2 Box Yield Strength has been executed, box components for the test specimens shall be machined from coupling stock with yield strengths that conform to the requirements included in 12.3.6.3 and Table 15. When the optional Task 2.2.4.2 Box Yield Strength has not been executed, box components shall be machined from pipes with properties within the range allowed by the candidate connection production specifications, and the coupling stock should be selected to have properties as close as practical to average production values.

Applicable mill certificates per ISO 11960 shall be provided for all pipe and coupling stock procured for candidate connection specimens. Copies of those certificates shall be included in the evaluation report.

13.3 Material property verification

13.3.1 Objective

Stress-strain properties of pipes and couplings procured for candidate connection specimens shall be checked prior to specimen machining, in order to confirm that the actual properties conform to specifications for the biased test population as established in 12.3.6.

Verification testing shall also be conducted to determine average coefficient of thermal expansion (CTE_a) for the heat of pipe used to make pin components, which is needed in the thermal cycle test for calculation of mechanical strain compensations (14.4.5) and might also be used for calibration of the elongation-strain measuring system (14.4.6). If the thermal expansion coefficients for the pin and box materials tested in Task 2.1 (12.2.2.2) were substantially different, then the average coefficient of thermal expansion of the tube used for the box components should also be verified.

13.3.2 Specimens for tensile verification tests

The material property verification tests shall be performed on axially-oriented material strip specimens (3.31) cut from material coupons (3.30) (i.e. from full-circumference short lengths of pipe) extracted from mother pipe and coupling stock used for manufacturing the candidate connection specimens. The specimen manufacture could be undertaken prior to conducting the material property verification tests, but the use of connection test specimens with material mechanical properties shown not to conform to the TWCCEP requirements (as specified in 12.3.6) is not permitted.

One material coupon (full-circumference tubular sample) shall be obtained from each length of mother tubes used to manufacture the full-scale test specimen pups and couplings. The coupon may be extracted from any axial location within the mother joint, but if substantial axial variability in mechanical properties is anticipated, extraction of more coupons is recommended. The axial position of the coupon relative to the connection test specimens shall be recorded. Coupon length should be adequate to enable machining of strip specimens and samples for any other material evaluations that might be warranted. If ERW pipe is used, the weld location should be identified and clearly marked, and the circumferential location of any strip specimens identified with respect to the weld centreline. Retention of the remaining material from the coupon is recommended, in the event that any further characterization of mechanical properties, microstructure, or chemistry of the test material is later required.

At least three longitudinal material strip specimens shall be manufactured from each coupon taken from a mother pipe used in the manufacture of any primary or spare pup or coupling, for use in the tests described in [12.3.3](#). Machining of additional strip specimens is recommended for backup purposes.

The material strip specimens should utilize a full-thickness rectangular cross-section or equivalent cylindrical or semi-cylindrical cross-section. All strip specimens should be of a similar geometry.

The material strip specimens should be extracted from within a single quadrant of the pipe circumference, and preferably from immediately adjacent circumferential positions. Material specimens manufactured from ERW pipe should be extracted at least 90° from the weld centreline. For small-diameter pipes for which the above-recommended specimen spacing is not possible, the circumferential distance between the specimen locations and the weld centreline should be maximized.

Relative circumferential locations of the extracted material strip specimens shall be recorded as the specimens are removed from the pipe coupon.

13.3.3 Scope of tensile verification tests

The following tensile verification tests shall be conducted on the material strip specimens ([3.31](#)) cut from each material coupon:

- A minimum of three tensile tests for each coupon from each mother pipe used to manufacture specimens for full-scale tests at elevated temperatures:
 - one test at ambient conditions;
 - one test at 180°C;
 - one test at the upper-bound temperature of the selected ASL.
- A minimum of one tensile test at ambient conditions for each coupon from each mother pipe used to manufacture specimens for full-scale tests at ambient temperatures.

The above tests shall be conducted using testing procedures that meet applicable ASTM specifications listed in [Clause 2](#). Utilization of the same procedure as previously used to complete Task 2.1 Initial Material Property Characterization is suggested to facilitate comparison of results.

The yield strength at the API yield strain (per ISO 11960) and the stress-strain curves shall be recorded in the evaluation report for each tensile verification test performed.

The yield strength measured in each ambient-temperature verification test shall be compared to the allowable range determined in Task 2.2 Specimen Configuration Analysis. The material yield strength shall be within the range determined in Task 2.2 in order for a connection made from that material to be used in the full-scale test.

The yield strengths measured in the elevated-temperature verification tests shall be compared to the elevated-temperature test results acquired in Task 2.1, and that comparison shall be recorded in the evaluation report. It is recommended that the normalized yield strength be calculated for each material sample and each elevated temperature (using the equation introduced in [12.2.4.2](#)), and that differences between the observed thermal degradation functions and those previously used for the specimen configuration analysis (Task 2.2) be recorded.

Inclusion of the obtained stress-strain data in the evaluation report is mandatory in order to:

- preserve a detailed record of the relevant mechanical properties together with the connection sealability and structural integrity testing results;
- enable subsequent users of the evaluation results to gain or maintain confidence in the applicability of the test results;
- facilitate future product line evaluation activities.

13.3.4 Coefficient of thermal expansion verification test

Verification of coefficient of thermal expansion (CTE) of the pin material is mandatory. Verification of CTE of the box material is recommended when CTEs for pin and box samples tested in Task 2.1 (12.2.2.2) were substantially different (i.e. differed by more than 15 % of their average value).

For each material (i.e. pin and/or box), samples for the verification CTE testing shall be extracted from one of the mother pipes used to make the Candidate Connection Specimens.

In each verification test, CTE data shall be obtained over the range of test temperatures according to the selected ASL, and the average thermal expansion coefficient CTE_a shall be determined. The method for determination of the CTE_a may be either as recommended below or as otherwise agreed by the assigner and the supplier.

The TWCCEP recommends that CTE testing should be conducted according to the requirements of ASTM E831-06, and should quantify the expansion response in the axial direction of the pipe. In general, the CTE can be expected to increase as a function of temperature. CTE tests should provide continuous experimental data indicating the measured change in sample geometry (and the associated thermal strain, $\Delta\varepsilon_{therm}$) as a function of temperature through two complete thermal cycles (one cycle includes ramp-up and ramp-down). That data should be used to calculate the average coefficient of thermal expansion CTE_a between the lower-bound temperature and upper-bound temperature for the selected ASL:

$$CTE_a = \frac{\Delta\varepsilon_{therm}}{\Delta T} \quad (2)$$

The expansion coefficient should be expressed in units of °C⁻¹.

Continuous thermal expansion testing results (elongation/strain versus temperature) should be retained, because they might aid confirmation of the accuracy of the strain measurement system used for the thermal cycle test, as discussed in 14.4.

13.4 Test specimen machining

13.4.1 General requirements

Connection specimens for full-scale physical testing are manufactured according to specifications determined for the biased test population (12.3).

For threaded-and-coupled connections, all couplings shall be machined at both ends, including those intended for the galling resistance test.

Only mechanical cutting is allowed. Torch cutting or abrasive cutting shall not be used.

13.4.2 Specimen naming convention

The six candidate connection specimens that are required for TWCCEP full-scale testing shall be numbered as Specimen 1, 2, 3, 4, 5 and 6 (refer to Table 19 in 13.4.4 for correlations between specimen numbers and the required geometrical configurations).

The replacement specimens for any of the above specimens shall be numbered by the original specimen number followed by a period and the replacement number – for example, Specimen 1.1 denotes the first replacement specimen for Specimen 1, and Specimen 1.2 denotes the second replacement specimen for Specimen 1, etc.

The pin and box components of each specimen shall be identified by the corresponding specimen number (either original or replacement); and for threaded-and-coupled connections, each pin and box component shall also be identified by a letter uniquely corresponding to each connection within a given specimen, according to the following convention.

For integral connections:

- each box component shall be identified by its specimen number;
- each end of each pin component shall be identified by its specimen number.

For threaded-and-coupled (TC) connections:

- each box component shall be identified by its specimen number and a letter A or B, with each letter corresponding to one side of the coupling;
- each end of each pin component shall be identified by its specimen number and a letter A or B, with each letter corresponding to the matching box component.

For both integral and TC connections:

- pin/box components shared by multiple specimens (e.g. for string assemblies) shall be identified by the number-letter combinations for each end, separated by "-";
- unthreaded ends shall be identified as blank.

Naming examples for integral connections:

- Pin 2-blank – designates pin component for Specimen 2.
- Pin 3-Box 4 – designates pin-box component for a string assembly, with the pin end belonging to Specimen 3 and the box end belonging to Specimen 4.

Naming examples for TC connections:

- Pin 2A-blank – designates pin component for Specimen 2 side A.
- Pin 3B-4A – designates pin component for a string assembly, with one end belonging to Specimen 3 side B, and the other end belonging to Specimen 4 side A.
- Box 5A – designates side A of Specimen 5.

13.4.3 Specimen length and length-reference requirements

The TWCCEP specifies a minimum length for each specimen pin component (casing pup) to be used in the combined-load full-scale tests, for two reasons:

- to ensure that each pup contains an interval free of end effects introduced by supports at both ends of that pup (end effects might be generated either by an end fixture or an adjacent connection in a string assembly);
- to provide for the length-dependent strain localization effects that can be expected to take place in the field during thermo-mechanical cycling to be reasonably simulated in the test configuration.

The pup length requirements are specified in terms of the minimum unsupported pup length. The unsupported pup length L_p is defined as the pup length that remains outside of the end fixture and/or coupling(s) after the pup is made up at both ends. The definition of the unsupported pup length is illustrated in [Figure 13](#). The same concept applies to both TC connections and integral connections. (See [4.3](#) for definitions of connection specimens for those two connection types).

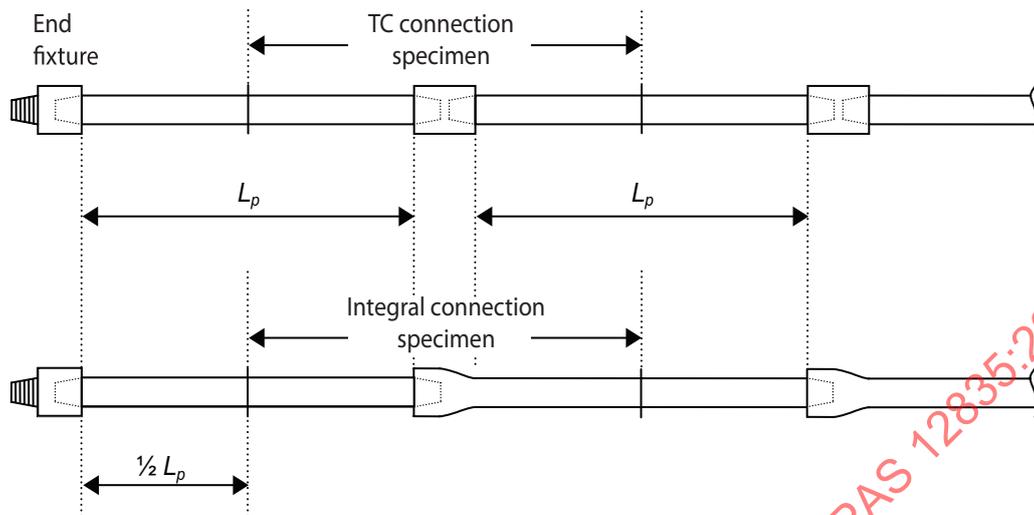


Figure 13 — Definition of unsupported pup length

The following requirements shall apply to each casing pup that belongs to each connection specimen:

- unsupported pup length L_p shall not be less than the maximum of the following:
 - $2x[D+6\sqrt{Dt}]$ (twice as long as the minimum length per ISO 13679)
 - 600 mm (24 in)
- additional length for gripping and/or end fixtures shall be provided.

The following requirement shall apply to the make-up support pin:

- unsupported length should be no less than 300 mm (12 in).

13.4.4 Geometrical configurations

Table 19 describes correlations between the connection specimen numbers and the required geometrical configurations for six candidate connection specimens that are subjected to full-scale testing. Geometry configuration codes WGS, WGT, WST, and WSC denote worst-case combinations of design variables selected for the biased test population, as described in 12.3.4 and 12.3.6. If configuration WST is the same as configuration WSC then specifications for Specimen 3 and Specimen 4 are the same as for Specimen 5 and Specimen 6.

The make-up support pin shall have fast thread taper.

Machining tolerances for interferences and tapers corresponding to various geometry configurations are provided in 13.4.6.

Table 19 — Geometrical configurations for test specimens and replacement specimens

Test specimen	Replacement specimens	Geometry code	Worst-case condition target
1	1.1, 1.2...	WGS	Galling in seal
2	2.1, 2.2...	WGT	Galling in threads
3	3.1, 3.2...	WST	Sealability in tension at low temperature
4	4.1, 4.2...	WST	
5	5.1, 5.2...	WSC	Sealability in compression at high temperature
6	6.1, 6.2...	WSC	

13.4.5 Mother pipe for specimens

The following principles shall be observed for specimen source pipe:

- All pipe segments for Specimen 3, Specimen 4, Specimen 5, and Specimen 6 shall be from the same heat and lot of steel, as shall all spares for these segments;
- Whenever possible, pipe segments for Specimens 3, 4, 5, and 6 should be made from a single mother joint;
- If Specimens 3, 4, 5 and 6 are indeed manufactured from a single mother joint as recommended above, then the material properties of that mother joint shall conform to specifications for the biased test population as determined in [12.3.6](#);
- If Specimens 3, 4, 5 and 6 are not all manufactured from a single mother joint, then the material properties of every mother joint used for those specimens shall conform to specifications for the biased test population as determined in [12.3.6](#), and the mother joints should be selected to have their material properties as similar as possible;
- Replacement pipe segments for Specimens 3, 4, 5 and 6 should be made from another single mother joint, and that mother joint should be selected to have material properties as similar as possible to the joint(s) from which the original specimens were made.

Uniformity of applied stresses is desirable for all pipe segments subjected to thermal cycle testing. When the segments are connected in series, their products of yield strengths and average wall thicknesses should be equal, to the extent practical. Pipe wall thicknesses of Specimens 3, 4, 5 and 6, and of spare pipe segments that might replace those originally intended for thermal cycle testing, shall be measured and traceably recorded. Thickness measurements shall be made at 90° circumferential intervals, at axial locations adjacent to each relevant pin thread and, for integral connections, adjacent to the external upset. Accuracy of the measurement method shall be ± 0.025 mm (± 0.001 in) or better. The products of yield strength and average thickness shall be considered, in addition to connection dimensions, whenever pipe segments assembled for a thermal cycle test are not manufactured from a single mother joint.

13.4.6 Specimen machining tolerances

Candidate connection specimens ([3.8](#)) shall be manufactured to achieve interference-taper combinations as defined in [6.4.3](#), specified in [12.3.4](#), and referenced in [Table 19](#). Upon completion of Task 2.2 Specimen Configuration Analysis, the targets for the diametric interferences in the seal and thread areas are specified as either minimum or maximum, and the targets for the pin and box thread tapers are specified as either slow or fast. This Clause provides machining specifications and tolerance ranges for the actual interferences and tapers of the test specimens, within which the test specimens shall be considered conformant with the above requirements for the minimum/maximum interference and fast/slow taper.

Dimensions not specified by TWCCEP requirements shall be within tolerances on manufacturing drawings.

Candidate connection specimens shall be machined so that all the following conditions are satisfied for each pin-box assembly:

- a) for each interference location (thread or seal), at least one of the diameters of individual members (pin or box) shall be within the sub-range of its design tolerances as specified by [Table 20](#). The other diameter may be outside of its design tolerance as long as the interference at that location conforms to the condition 2) below;
- b) for each interference location (thread or seal), the interference based on the as-machined diameters in the assembled condition consistent with nominal make-up position, shall be within the range specified in [Table 21](#);
- c) each thread taper shall be within the range specified in [Table 22](#);
- d) each seal taper shall be within its production tolerance range.

Additionally, if bored pin tips will have diameters smaller than the pipe's internal diameter, the boring of all pin tips that might be used in a thermal cycle test shall be extended so the casing segments will nowhere have internal diameters smaller than the specified tip-bore diameters.

Table 20 — Allowable diameter range within design tolerance

Target interference	Allowable component diameter range	
	Pin (*)	Box (*)
Maximum	Upper half of pin tolerance band	Lower half of box tolerance band
Minimum	Upper half of pin tolerance band	Lower half of box tolerance band

Note (*) - at least one component, i.e. either pin or box, shall be within the allowable diameter range for each target interference case
- the same principle applies to seal and thread interferences

[Table 21](#) defines and [Figure 14](#) illustrates the interference ranges allowed for candidate connection specimens in terms of minimum interference and maximum interference that result from the candidate connection production specifications for component diameters (nominal dimensions and tolerances). The following symbols are used in [Table 21](#) and in [Figure 14](#):

- I_{max} maximum design interference in reference thread location or reference seal location, resulting from pin and box diameter specifications;
- I_{min} minimum design interference in reference thread location or reference seal location, resulting from pin and box diameter specifications;
- I_{range} range of design interference in reference thread location or reference seal location, equal to I_{max} minus I_{min}

By agreement between the assigner and the supplier, other tolerances may be considered when defining tolerance and interference ranges (for example, tolerances on thread height or torque shoulder depth). Any such additional considerations shall be documented in the evaluation report.

Table 21 — Interference ranges for test specimens

Target interference	Allowable specimen interference range	
	From	To
Maximum	I_{max}^{-max} $\left[\begin{array}{l} 0.04mm(0.0016in), \\ 20\% \times I_{range} \end{array} \right]$	I_{max}^{+max} $\left[\begin{array}{l} 0.01mm(0.0004in), \\ 5\% \times I_{range} \end{array} \right]$
Minimum	I_{min}^{-max} $\left[\begin{array}{l} 0.01mm(0.0004in), \\ 5\% \times I_{range} \end{array} \right]$	I_{min}^{+max} $\left[\begin{array}{l} 0.04mm(0.0016in), \\ 20\% \times I_{range} \end{array} \right]$

NOTE The same principle applies to seal and thread interferences

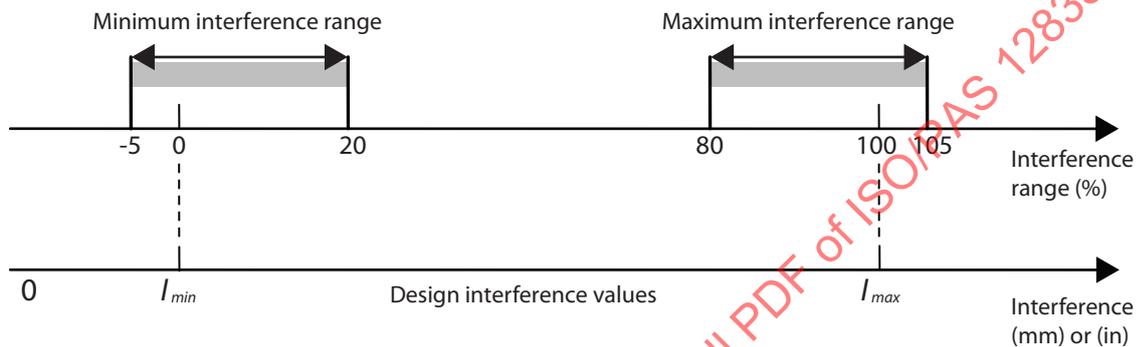


Figure 14 — Illustration of allowable interference ranges for specimen components

Table 22 defines the thread taper ranges allowed for candidate connection specimens in terms of minimum and maximum thread tapers that result from the candidate connection production specifications.

Table 22 — Thread taper ranges for test specimens

Taper designation	Allowable thread taper ranges for components	
	From	To
Slow	No lower limit	Slow taper limit during production plus 0.025 mm/25.4 mm (0.001 in/1 in)
Fast	Fast taper limit during production minus 0.025 mm/25.4 mm (0.001 in/1 in)	No upper limit

NOTE Taper tolerances shall apply to every incremental measurement of taper along a thread.

Figure 15 illustrates the adopted taper naming convention and the allowable taper ranges described in Table 22.

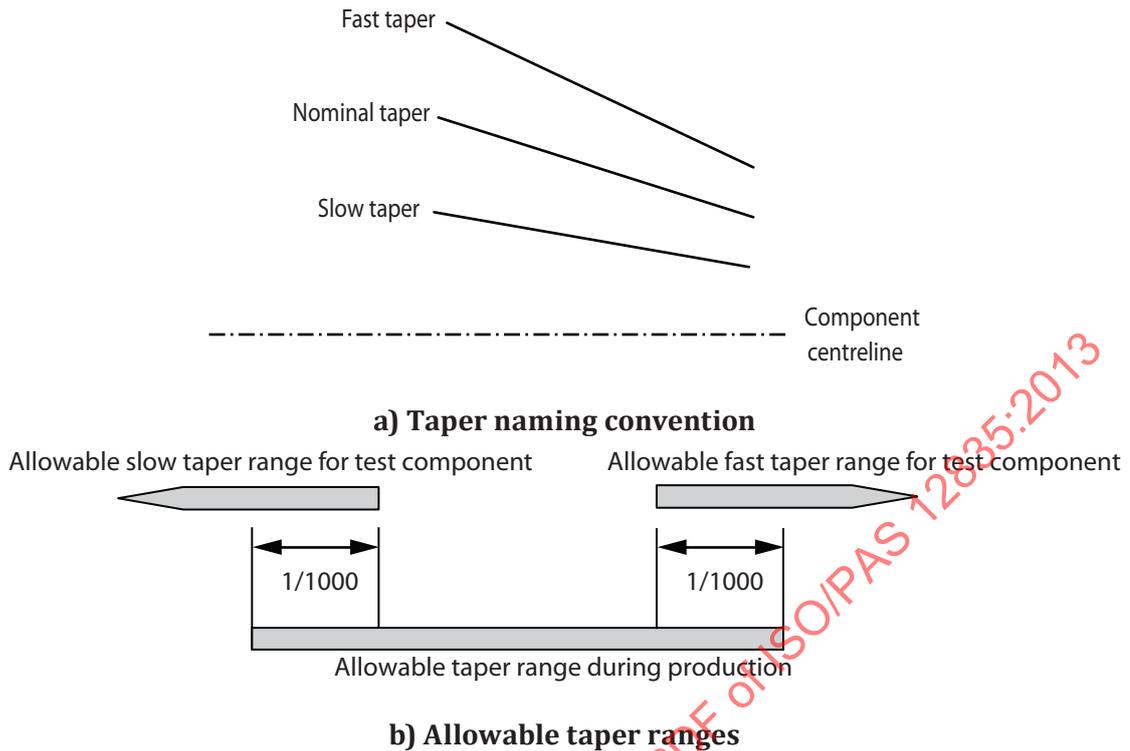


Figure 15 — Illustration of allowable thread taper ranges for specimen components

13.5 Markings

All couplings, pipe segments and material samples shall be clearly marked with metal stamps.

Markings shall identify each pin and box component of each pipe and coupling according to the specimen naming convention described in 13.4.2.

Couplings shall be marked at each end. Redundant markings are encouraged. Preferred stamping locations are the unthreaded faces of the pipe segments, the faces of the couplings and the faces of material samples.

13.6 Specimen geometry verification

13.6.1 Gauging inspection scope

Geometry of all test specimens shall be verified by gauging. Gauging shall be completed by the supplier according to the supplier's procedure. Gauging results shall be confirmed by the inspector. All gauging sheets and setting standards used to control the specimens' dimensions and measurements shall be traceable to the drawings of the candidate connection being evaluated.

The scope of the inspector's specimen geometry verification shall be agreed by the assigner and the supplier.

As provided by Clauses in 7.2, the TWCCEP does not require that any confidential connection design information (e.g. connection drawings) be revealed by the supplier in the course of the gauging inspection.

The inspector should obtain current calibration records for any gauging equipment (e.g. setting standards or bias zero settings) used by the supplier, and include those calibration records in the inspection report.

13.6.2 Inspection extent – example cases

In general, connection gauging and quality inspection procedures vary depending on the connection manufacturer, connection design, availability of gauges, and quality-management program in place. The following paragraphs in this Clause illustrate example cases of possible inspection scope, depending on the extent to which the inspector has access to the supplier's design information. The extent of that access shall be agreed between the assigner and the supplier.

- a) Case 1 - no design information on the candidate connection is provided to the inspector.

The inspector is to verify conformance of specimen dimensions to the supplier's specimen gauging sheets, either through absolute dimensioning or by gauging referenced to traceable standards.

- b) Case 2 - design information on the candidate connection is provided to the inspector.

The inspector is to verify conformance of the supplier's specimen gauging sheets with the candidate connection design drawings and production procedures, or alternatively with production line gauging sheets and production procedures, to confirm that the specimen gauging sheets satisfy TWCCEP dimensional requirements. After that verification, the Inspector is to verify conformance of specimen dimensions to the specimen gauging sheets, either by absolute dimensioning or by gauging referenced to traceable standards.

The assigner shall specify the extent of the inspector's verification of specimen dimensions (e.g. the assigner might limit verification gauging to specimen dimensions restricted by [13.3.4](#)).

13.6.3 Geometry inspection guidelines

Some additional specimen geometry-verification guidelines include:

- Gauging equipment should have a resolution of at least 10 % of the tolerance bands of specimen diameters and tapers, or better.
- If possible, gauging frames that hold dial indicators should be stiffer than the frames used at the production line.
- If setting standards are not available, and gauge blocks are used to zero dial indicators, compensating corrections that depend on surface tapers and diameters of the contact tips must be calculated.
- Temperatures of gauging frames, dial indicators, setting standards and specimens being gauged should be consistent both at the time of dial indicator zeroing and at the time of specimen gauging. Only 1°C difference in temperature between a gauging frame and a carbon steel specimen will cause 0.0025 mm (0.0001 in) measurement error in 230 mm (9 in) diameter, an error equal to 10 % of a representative tolerance band for a specimen's diameter. This might require allowing time for a specimen's temperature to stabilize following machining.

A dimensional inspection report must allow a reader to understand how accurately TWCCEP-specified dimensions and diametric interferences conform to requirements, but without publishing the actual dimensions. Achieving both of these reporting objectives might require some adaptability. Thread tapers can be documented as the amount that measured tapers differ from minimum or from maximum production values. Conformance of pin or box diameters to [Table 20](#) can be reported simply as yes or no. Diametric interferences can be reported as percentage values, with reference to production ranges as 0 % to 100 %, if the supplier chose that alternative for determining specimen interferences from production interferences. Otherwise diametric interferences can be reported as the amount that they differ from minimum or maximum production values, similarly to the reporting of thread tapers.

Dimensional interferences cannot be directly measured. They must be calculated from specimens' diameter measurements. Recording those diameter measurements (in a parallel manner to interferences) will enhance traceability of the calculated interferences and facilitate the choosing of a spare specimen to substitute for an inadvertently damaged specimen. Nevertheless, a matrix showing diametric interferences of all possible pin and box combinations could be prepared, allowing a supplier to request that individual diameters not be included in either interim or permanent inspection records.

13.7 Procurement and quality control of connection interfacial components

The TWCCEP treats connection interfacial components as inherent elements of a connection's design, and specific elements of the candidate connection specimens submitted for an evaluation program. This is because interfacial components affect not only the connection assembly and galling resistance but also sealability. The impact of the interfacial components on sealability can be particularly significant during and after exposure to high temperatures.

In general, interfacial components can be divided into two classes:

- Class 1: interfacial components that are applied to the casing pipes and couplings (pin and box components) as part of the pin and box manufacturing process e.g. phosphate coatings;
- Class 2: interfacial components that are applied upon connection assembly e.g. thread compounds.

All interfacial components utilized in the candidate connection specimens shall conform to the supplier's design specifications.

The supplier shall perform quality control of the Class 1 interfacial component(s), which have been applied to the pin and box components of the candidate connection specimens during their manufacturing, and provide a corresponding written confirmation to the assigner and the evaluator. That quality-control confirmation shall be included in the evaluation report.

The assigner and the supplier shall agree on the procurement of the Class 2 interfacial component(s) that will be applied during the candidate connection specimens. By default, those interfacial components will be provided by the Supplier or by a party designated by the supplier. The supplier shall ensure that the procured interfacial components are supplied with relevant product certificates that will enable unique identification of the supplied product. Those certificates shall be supplied to the assigner and the evaluator, and shall be included in the evaluation report.

The assigner, the supplier and the evaluator shall agree on the extent of the quality control that shall be performed on the supplied interfacial components.

13.8 Specimen handling and storage

13.8.1 Handling recommendations

All specimens shall be handled with due care and attention to avoid any accidental damage to or undesirable effect on the specimens. If they are needed, the supplier should provide instructions for special handling or storage of specimens.

Care of test specimens must begin at the machine shop, even before machining begins. Specimens must not be dropped, whether or not they have been machined, or residual stresses might cause unpredictable behaviour. The cost of rejections after specimens and spares leave the machine shop is potentially very large, so precautions should be commensurate.

Prudent practice will involve selection of pipe segments for thermal cycle testing according to products of yield strengths and average wall thicknesses, as discussed in [13.4.5](#).

Impact damage to machined surfaces is to be avoided. Usually impact damage to threads can be repaired, if it is noticed before it causes galling during testing activities, but most suppliers prohibit seal surface repairs. The potential for handling damage in the machine shop can only be minimized with good work practices. The potential for handling damage after specimens leave the machine shop can be reduced by packaging on pallets or in bundles, with special attention to protection of pipe segment ends.

More subtle sources of damage should be avoided, too. Care must be exercised to avoid contact of grinder wheels with seal surfaces when manually removing sharp edges of vanishing threads nearest those seals. Grit should be removed from machined surfaces and from thread protectors before those thread

protectors are installed. Corrosion protection products (e.g. Kendex or equivalent) should be applied to machined surfaces quite soon after machining is finished, especially in hot and humid climates.

Experience in specimen handling and storage is valuable. Any doubt about the adequacy of precautions should be resolved conservatively.

13.8.2 Treatment of damaged specimens

The procedure to be followed if a test specimen is inadvertently damaged, after leaving the machine shop, will depend on timing and circumstances. If damage is detected before testing of a pin or box component begins, selection of a replacement from the spares should be relatively straight-forward, based on satisfaction of diametric interferences per 13.4.6 and on matching of pipe segment strengths per 13.4.5, if applicable. The correct response is less clear if inadvertent damage occurs after beginning a history-dependent sequence, such as sequential make-ups and break-outs of Specimens 1, 2, 3 and 5. The replacement strategy might become additionally complicated when a damaged part affects multiple specimens; for example, when the damage occurs to a pin-by-pin pup intended to become an intermediate pup in a specimen string for the thermal cycle test. If the number of spares does not allow restarting the history-dependent sequence with a fresh pin and a fresh box, a decision about acceptable resolution must be reached.

When test specimens get damaged, the assigner and the supplier shall jointly choose from the available action alternatives and decide on procedure to continue testing.

Combined scope of testing performed on the original and/or replaced test specimens before the damage and after the damage shall not be less than required by TWCCEP specifications for undamaged specimens.

All occurrences of specimen damage and corresponding actions taken shall be documented in the evaluation report.

14 Full-scale physical tests and supplementary analyses

14.1 Overall task description

This Clause describes the fourth block of the TWCCEP evaluation procedure, which consists of full-scale tests and supplementary analyses (see Figure 6). The tasks in this block are conducted to assess performance of the candidate connection (3.7) under loading conditions consistent with the selected ASL, with respect to galling resistance, structural strength, and sealability.

This block contains five tasks: Task 4.1 Galling Resistance Test, Task 4.2 Thermal Cycle Test, Task 4.3 Bending Evaluation, Task 4.4 Limit-Strain Test, and Task 4.5 As-tested Configuration Analysis. Task 4.3 contains two subtasks: Task 4.3.1 Bending Analysis and Task 4.3.2 Bend Test. Task 4.4 also consists of two subtasks: Task 4.4.1 Localized Strain Seepage and Task 4.4.2 Tension Limit.

The full-scale testing tasks in this block are: Task 4.1 Galling Resistance Test, Task 4.2 Thermal Cycle Test, Task 4.3.2 Bend Test, and Task 4.4 Limit-Strain Test. The supplementary analyses tasks are: Task 4.3.1 Bending Analysis and Task 4.5 As-Tested Configuration Analysis.

Mandatory tasks in this block are: Task 4.1 Galling Resistance Test, Task 4.2 Thermal Cycle Test, and Task 4.4.2 Tension Limit.

Optional tasks in this block are: Task 4.3 Bending Evaluation, Task 4.4.1 Localized Strain Seepage, and Task 4.5 As-Tested Configuration Analysis.

Six full-scale connection specimens are required for the full-scale test program. The specimens shall be manufactured as per the requirements described in Clause 13.

Results of the mandatory full-scale tests are the only results of the evaluation program that require comparison with threshold performance requirements, and that count towards meeting the TWCCEP pass-fail criteria.

Results of the supplementary analyses are not compared to the threshold performance requirements, but may be considered in the assessment of the candidate connection performance under application-specific conditions that are not simulated in the mandatory tests. These results may also be used to guide decisions relative to additional testing that might be desired for some applications.

Test data and results from other connection assessment programs may be utilized in lieu of some or all subtasks of Task 4.1, 4.2, 4.3, 4.4 and 4.5, if applicability of that prior evaluation data to the candidate connection and its conformance to TWCCEP requirements is demonstrated according to the provisions in [8.5](#).

The following Clauses describe TWCCEP requirements for the full-scale tests and supplementary analyses, including test and analysis scope, set-up and execution, result interpretation, and reporting.

14.2 Full-scale tests - General requirements

14.2.1 Ambient temperature at test site

TWCCEP full-scale tests might be conducted in various laboratories around the world in which average ambient temperatures might be different. Local temperatures might also vary with seasons of the year and even on a daily basis.

The TWCCEP provides means to correct for impacts of different ambient conditions on some test procedures, e.g. the ranges of cyclic temperature variations in the thermal cycle test (see [14.4.4](#) and [14.4.5](#)). In addition to those procedural adjustments, the TWCCEP restricts the range allowed for the ambient temperature variations in order to limit their impacts on various aspects of the connection evaluation - for example, temperature-dependence of instrumentation, assembly procedures, or connection interfacial component properties.

Ambient temperature T_{amb} in the facility where a TWCCEP full-scale test is executed shall be between 5°C and 40°C during the execution of that test:

$$5^{\circ}\text{C} \leq T_{amb} \leq 40^{\circ}\text{C}$$

14.2.2 Calibration of instrumentation

Calibration of all gauges and instrumentation shall be current. The accuracy and calibration frequency of instrumentation to be used during testing shall satisfy the requirements of ISO 13679.

The test laboratory standards for calibration and all the calibrations shall be documented. Copies of calibration reports for the devices measuring forces, pressures, torques, and displacements shall be included in the evaluation report.

Relative calibration of measuring devices, i.e. with a candidate measuring device being calibrated against a reference measuring device is permitted only when the reference device has been calibrated to traceable standards. Any such relative calibration shall be documented.

Calibration of instrumentation may be further verified by additional calibration activities. The extent of such activities shall be determined by agreement between the assigner, the evaluator and the inspector.

14.2.3 Disabling of secondary seals

Connection sealability assessments shall be based only on primary sealing surfaces. Any other potential sealing surfaces that might impede gas flow to seepage detection ports shall have sealability demonstrably disabled.

In connections whose primary seals are flank seals and have torque shoulders in the flow path from the connections' interiors to seepage detection ports, disabling of torque shoulder sealability shall be ensured.

Disabling of secondary seals can be achieved by machining two grooves across the sealing face(s) of a connection component (as provided by ISO 13679) or by any other method that will ensure that the pressure of the test medium acting on the primary connection seal is the same as the specimen internal pressure.

Disabling of secondary seals shall be performed prior to the final assembly of the affected specimens. In specimens subjected to multiple make-breaks before a sealability test, disabling of the axial seals may be performed either before or after the make-ups associated with the galling resistance test.

14.2.4 Seepage measurement and rate definitions

14.2.4.1 Seepage collection – configuration

In any sealability test, seepage past a primary connection seal shall be routed to a monitoring device via ports drilled radially through the coupling wall at the low pressure side of the seal. Representative locations for such ports are illustrated in [Figure 16](#). Two ports shall be circumferentially located 180° apart at each axial location. Ports should be approximately 2.4 mm (3/32 in) in diameter and could be enlarged at their outer ends for attachment of seepage monitoring tubing if required, but enlargement should be minimized. The ports shall be drilled after final make-up of each connection whose seepage will be monitored, or closed during all make-ups to prevent loss of thread compound from the connections.

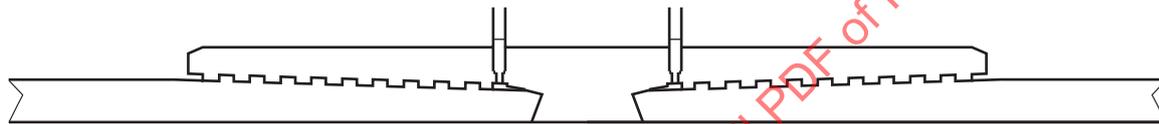


Figure 16 — Seepage detection ports

After the ports have been drilled, communication between each connection’s two drilled ports should be cleared by injection of air or inert gas into one of those ports. Pressure of injected air or gas should not exceed the lowest value of 1,000 kPag (140 psig) and 25 % of the connection’s rating for internal pressure.

Seepage from both ports at each axial location shall be jointly routed to a monitoring device that measures seepage volume or seepage rate. Tubing shall be small to minimize internal volume; metal tubing with 3.2 mm (1/8 in) outside diameter and working pressure greater than 25 % of the connection’s pressure rating is recommended. The monitoring device shall be capable of measuring gas volumes as small as 1 mL or seepage rates as small as 0.06 mL/min. If the seepage rate exceeds the monitoring device capacity, seepage rate shall be recorded as the arithmetic average of manual samplings. Those samplings shall be taken no more than one hour apart, and no less frequently than at the beginning and end of any time interval in which testing conditions are held constant while internal pressure is applied to the connection specimen being tested.

A simple example of an acceptable method of seepage measurement is displacement of water in a graduated cylinder during a measured time interval. That example configuration is illustrated in [Figure 17](#). Its main principle of operation is that an inverted graduated cylinder is inserted in a reservoir with water. Near-vacuum is drawn inside the cylinder, which draws a certain water column inside the cylinder. In a test, gas seeped from a connection is conducted via a detection tube. The detection tube end is inserted into the immersed portion of the graduated cylinder. As more and more of the seeped gas bubbles through into the near-vacuum space, gas pressure builds up in that space and pushes the water level down. The amount of water displacement is calibrated to the volume of the seeped gas.

If that method is used, then all volume measurements shall be with respect to ambient laboratory temperature and atmospheric pressure. It is assumed that at the beginning of each detection period the detection tube is entirely filled with gas, so that a bubble is “just-forming” at its end inserted in the graduated cylinder. In that state, the back pressure in the tube depends on the depth of the tube’s open end beneath the water’s free surface in the reservoir. To minimize back-pressure in the gas collection system, differences in elevation between the detection tube end and the water level in the reservoir

at the time of volume measurement shall not exceed 250 mm, which corresponds to ± 2.4 % maximum measurement error relative to typical atmospheric pressure.

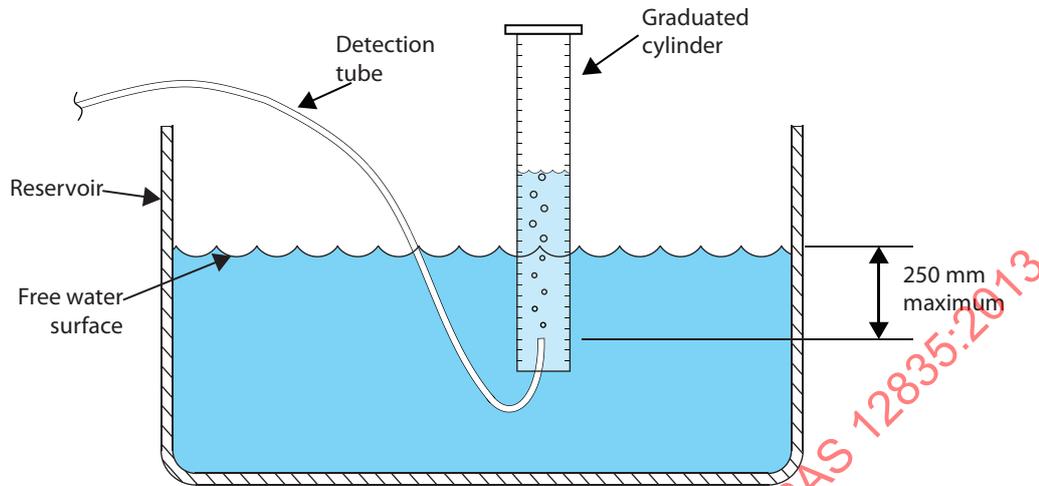


Figure 17 — Basic seepage volume measurement

It is assumed that the gas trapped in the inverted cylinder will have its temperature, and hence its volume, influenced by the temperature of the water bath. To minimize temperature-related effects on the gas in the collection system, the water temperature shall not differ from the ambient laboratory temperature by more than 5°C , which corresponds to ± 1.7 % maximum measurement error relative to an ambient temperature of 293°K (assuming ideal gas behaviour).

Other methods of measuring seepage volumes or rates shall have errors no larger than ± 4 %.

14.2.4.2 Seepage monitoring lines – maintenance

Seepage monitoring tubing (lines) shall be checked for blockage before and after each seepage-monitoring interval, unless:

- seepage is evident, or
- two or more consecutive monitoring intervals occur at the same target temperature and are not separated in time by more than 8 h, in which case the lines shall be checked before the first and after the last of those intervals.

Checking shall be done by monitoring transmission of air or gas from the outlet end of one tube to the outlet end of the other tube for each connection. Pressure of the injected air or gas shall not exceed 20 kPag (3 psig) during these checks. All checking events shall be documented. Any blocked tubing shall be cleared or replaced and the time of blockage detection recorded.

14.2.4.3 Gas seepage rates during holds and average per-connection rates

Gas seepage volume during any hold interval shall be the volume of gas, at standard temperature and pressure, released during the duration of the hold interval.

Per-hold seepage rate for a given hold interval shall be equal to the ratio of the gas seepage volume (as defined above) in that hold interval divided by the duration of that hold interval.

Per-connection average seepage rate for a given loading condition is defined as the sum of that connection's per-hold seepage rates in all hold intervals divided by the number of hold intervals at that loading condition.

EXAMPLE Average rate under tension in the thermal cycle test:

Per-connection average seepage rate at high cycle temperature is defined as the sum of that connection's per-hold seepage rates in all intervals at high cycle temperature (i.e. in all cycles) divided by the number of cycles performed in the thermal cycle test.

14.2.5 Excluded connections

The TWCCEP allows for exclusion of performance of some connections that have been tested in any TWCCEP full-scale test from comparison with the threshold performance requirements (3.45). Any such connections are referred to as excluded connections (3.19). Observed and/or measured performance of excluded connections shall be reported in the evaluation report, but such performance shall not be considered in determining whether or not the threshold performance requirements have been met.

Any party assigned to a program role in an evaluation program (assigner, supplier, evaluator or inspector) can present rationale for granting the excluded connection status to one or more connections that have been tested in any full-scale TWCCEP test.

A connection shall be granted the status of an excluded connection if, and only if, all the following conditions are satisfied:

- a) A circumstance occurs during test execution that substantially affects that connection performance in a way that is inconsistent with TWCCEP test specifications;
- b) The evaluator or the inspector provides a written description of the above circumstance and all pertaining evidence (e.g. photos) to the assigner, and the assigner provides that material to the supplier;
- c) The assigner and the supplier review the provided evidence and agree on granting excluded connection status to the affected connection;
- d) At least two independent parties performing the protocol roles are involved in reaching the agreement on excluded connection status referred to in c) above. For example, if the assigner is the same party as the supplier, the evaluator or the inspector needs to review the evidence and concur with the assigner; and if a single party combines the roles of assigner, supplier and evaluator, the inspector needs to act as the second independent party;
- e) The evidence relative to the circumstance described in a) and b), and the agreement reached in c) and d) are included in the evaluation report.

Examples of conditions that might justify connection exclusion include, but are not limited to:

- localized loading inconsistent with the intended test procedure. For example, local buckling occurred during thermal cycling due to inadequate lateral support of the specimen or string in that area;
- inadequate execution of the test procedure. For example, seepage detection lines were found to have been plugged or disconnected for a portion of the test;
- connection post-mortem examination indicated damage that occurred during specimen assembly and/or testing that is considered to not have resulted from the intended test loads.

If the number of excluded connections in any full-scale test (galling resistance test or thermal cycle test or bend test or limit-strain test) does not exceed one connection (single leak path), then no repeat testing is required; otherwise, replacement specimens for the specimens that contain excluded connections shall be re-tested, and the number and testing sequence of those replacement specimens shall be consistent with the number and testing sequence of the excluded Connections to the degree that is possible, and any differences in history and/or testing sequence between the replacement specimens and excluded connection specimens shall be documented.

14.3 Galling resistance test

14.3.1 Task description

The galling resistance test is a full-scale test conducted on four specimens of the candidate connection (3.7). This test constitutes Task 4.1 of the TWCCEP evaluation procedure (see Figure 6). This task does not contain any subtasks.

Execution of Task 4.1 is mandatory.

Results of this test are key performance measures that are compared with TWCCEP threshold performance requirements (3.45).

The following Clauses describe the rationale, scope, set-up, data, and performance requirements for the galling resistance test:

- 14.3.2 Rationale and objectives
- 14.3.3 Make-break specimens
- 14.3.4 Scope of galling resistance test
- 14.3.5 Set-up and instrumentation
- 14.3.6 Test procedure
- 14.3.7 Performance assessment
- 14.3.8 Reporting.

14.3.2 Rationale and objectives

The TWCCEP recognizes two categories of galling damage to connection seal and thread surfaces: repairable galling (3.34) or severe galling (3.35), which refer to damage that, respectively, can or cannot be repaired according to the supplier's field-repair procedure for the candidate connection (see definitions in Clause 3).

Because casing connections might experience multiple make-ups and break-outs during casing string assembly in field service, the objective of the galling resistance test is to verify the candidate connection's ability to withstand multiple make-ups and break-outs without severe galling.

Optionally, monitoring of connection deformation during make-ups and break-outs can provide additional insight into the connection's response to multiple make-ups.

14.3.3 Make-break specimens

Four connection specimens (3.12) shall be submitted for the galling resistance test: Specimen 1, Specimen 2, Specimen 3 and Specimen 5. Collectively, these specimens are referred to as make-break specimens (3.28).

The galling resistance test may be conducted prior to or together with the assembly of specimens for subsequent full-scale tests. If the specimen assembly for further testing is conducted at the same time as the galling resistance test, then Specimen 4 and Specimen 6 shall also be provided together with the make-break specimens.

Thread compound (dope) shall be obtained in accordance with the supplier's specifications for the candidate connection. A Material Safety Data Sheet (MSDS) shall be provided.

14.3.4 Scope of galling resistance test

The scope of Task 4.1 Galling Resistance Test includes multiple make-up and break-out cycles performed on make-break specimens and final assembly of connection specimens required for subsequent full-scale testing. Table 23 illustrates the scope of the make-break activities and target torques for the make-ups in the galling test and final specimen assembly.

Table 23 — Make-break sequence and final specimen make-up

Geometry config.	Specimen	Make-break activity			Assembly for subsequent testing	
		Specimen make-up number	Target make-up torque	Break-out	Full-scale test after final make-up	String assembly recommended
WGS	1	1	Maximum	Yes		No
		2				
		3				
		4 = final	TF (WGS)	No	Limit strain test	
WGT	2	1	Maximum	Yes		No
		2				
		3				
		4 = final	TF (WGT)	No	Bend test	
WST	3	1	Maximum	Yes		No
		2				
		3 = final	TF (WST-M)	No	Thermal cycle test	Yes
	4	1 = final	TF (WST-S)	No	Thermal cycle test	Yes
WSC	5	1	Maximum	Yes		No
		2				
		3 = final	TF (WSC-M)	No	Thermal cycle test	Yes
	6	1 = final	TF (WSC-S)	No	Thermal cycle test	Yes

The codes for the final make-up torques TF(XXX) in Table 23 are consistent with specifications provided in Table 16 and Table 17 in 12.3.7. Upon completion of the analysis described in 12.3.7, the targets TF(XXX) for the final make-up torques become either minimum torque or maximum torque, in accordance with specifications and tolerances for the minimum and maximum target torques provided in 14.3.6.3.

Specimen 1 shall undergo three make-ups to the maximum torque, followed by a final make-up to a final torque TF(WGS), which will be either the minimum or the maximum torque.

Specimen 2 shall undergo three make-ups to the maximum torque, followed by a final make-up to a final torque TF(WGT), which will be either the minimum or the maximum torque.

Specimen 3 shall undergo two make-ups to the maximum torque, followed by a final make-up to a final torque TF(WST-M), which will be either the minimum torque or the maximum torque.

Specimen 4 shall be made up once to a final torque TF(WST-S), which will be either the minimum or the maximum torque.

Specimen 5 shall undergo two make-ups to the maximum torque, followed by a final make-up to a final torque TF(WSC-M), which will be either the minimum torque or the maximum torque.

Specimen 6 shall be made up once to a final torque TF(WSC-S), which will be either the minimum or the maximum torque.

Seal and thread surfaces of each specimen shall be examined upon each break-out. Any evidence of repairable galling and/or severe galling shall be recorded.

14.3.5 Set-up and instrumentation

14.3.5.1 Make-up process

Experimental set-up for the galling resistance test shall be adequate to carry out the make-break activities in accordance with the supplier's make-up and break-out procedure for the candidate connection (3.7).

Make-up and break-out conditions should be representative of the field conditions to the degree possible in the laboratory facilities where the testing is performed. Vertical make-up orientation is preferred to alleviate potential for pin-box misalignment, but horizontal make-up can be used provided that the assigner, the supplier and the evaluator agree on such orientation and additional test-specific requirements, if any are required (e.g. regarding the string make-up for the thermal cycle test). Note, this TWCCEP version does not address challenges relative to slant make-up.

For coupled connections, floating of the coupling shall not be performed (i.e. each side shall be made up separately). Floating is not permitted to ensure that controlled make-up torque is applied to each connection separately and incremental make-ups of any test connections are avoided.

For each make-up and break-out of a coupling that contains an open end, the make-up support pin or a specimen pin shall be used to support that open end.

When gripping couplings (or boxes), clamping forces should be controlled to prevent adverse distortion of the internally threaded member.

14.3.5.2 Torque-turns measurement

Applied torque and specimen turns shall be simultaneously monitored and recorded during each make-up and break-out on torque-versus-turn plots.

Resolution of the turn data recording system shall be at least 1/1000th of a turn.

Turns may be measured with a wheel in contact with the rotating specimen, such as a turn potentiometer.

Torque may be measured with a load cell on a line attached to the moment arm of the tong. Adjustments might be required if the line is not perpendicular to the moment arm.

14.3.5.3 Use of strain gauges

It is recommended that deformation of each make-break specimen be monitored during each make-up and break-out.

Specimen instrumentation layout and strain measurement procedure should be according to ISO 13679.

NOTE ISO 13679:2002 did not address the use of strain gauges for the galling resistance test, but the next revision is expected to address that subject.

14.3.6 Test procedure

14.3.6.1 General requirements

Unless otherwise required by this standard, make-ups and break-outs of specimens shall be conducted according to the procedure provided by the supplier. The procedure provided by the supplier for the evaluation program shall be consistent with the procedure used for field assembly of the candidate connection.

The galling resistance test shall be performed at ambient temperature.

14.3.6.2 Thread compound (dope) application

When required, thread compound shall be applied according to specifications provided by the supplier plus additional requirements outlined below. In the event that the dope application requirements listed in this clause contradict the supplier's specifications, the supplier's specifications shall override the requirements listed below and any such occurrence shall be documented.

Connection seals and threads shall be clean and dry prior to dope application.

The same thread compound type shall be used for all test specimens.

All dope application shall be performed with a fine-bristled brush or a paint brush. The brushes shall be new or in a condition that does not show any damage or extensive use.

If the supplier's specifications indicate that dope amounts in the field application are to be controlled by weight, then:

- amount of dope to be applied for each make-up in the test shall be controlled by weight;
- for make-ups performed to maximum target torque, the dope amount shall be no more than the minimum amount plus 10 % of the amount range specified by the supplier;
- for make-ups performed to minimum target torque, the dope amount shall be no less than the maximum amount minus 10 % of the amount range specified by the supplier;

If the supplier's specifications indicate that dope amounts in the field application are to be controlled by visual standards only, then:

- amount of dope to be applied for each make-up in the test shall be controlled by visual standards;
- for make-ups performed to maximum target torque, the dope amount shall be as close as practically possible to the minimum amount allowed by the supplier;
- for make-ups performed to minimum target torque, the dope amount shall be as close as practically possible to the maximum amount allowed by the supplier.

14.3.6.3 Make-up torque specifications

The torque achieved at the first make-up of each make-break specimen, which is performed to maximum target torque, shall not be less than the maximum torque allowed by the supplier minus the greater of the following:

- 10 % of the maximum torque allowed by the supplier;
- 20 % of the difference between the maximum torque and minimum torque allowed by the supplier.

The torque achieved at each make-up performed to maximum target torque, other than the first make-up of each make-break specimen, shall not be less than the maximum torque allowed by the supplier minus the greater of the following:

- 5 % of the maximum torque allowed by the supplier;
- 10 % of the difference between the maximum torque and minimum torque allowed by the supplier.

The torque achieved at each make-up performed to minimum target torque shall not be greater than the minimum torque allowed by the supplier plus the greater of the following:

- 5 % of the maximum torque allowed by the supplier;
- 10 % of the difference between the maximum torque and minimum torque allowed by the supplier.

If the above torque specifications are not achieved in a make-up of a connection in a make-break specimen, then the connection shall be broken out and made up again.

If the above torque specifications are not achieved in a make-up of a connection in Specimen 4 or Specimen 6, then either that connection shall be broken out and made up again or a replacement specimen shall be used, and the choice between those two options shall be made so that the total number of make-ups experienced by the pin and box components of the affected Specimen 4 or the affected Specimen 6 or their replacement specimens is minimized.

14.3.6.4 Repairs

Observed repairable galling shall be repaired. The repairs shall be performed according to the field repair procedure and recommendations provided by the supplier.

14.3.7 Performance assessment

The following threshold performance requirements for the galling resistance test are provided for reference purposes in accordance with adopted principles for TWCCEP assessment criteria and result interpretation specified in [6.3.6](#) and [6.3.10](#).

A candidate connection shall be considered to have met threshold performance requirements in the galling resistance test if all of the following conditions have been satisfied for all connections included in the make-break specimens except any excluded connections:

- a) Each connection has achieved the required number of make-break cycles;
- b) Make-up torques have been within limits specified for this test;
- c) No severe galling on seal or threads has been observed;
- d) Any observed repairable galling on seal or threads has been repaired according to the supplier's repair procedure.

14.3.8 Reporting

As a minimum, reporting of Task [4.1](#) Galling Resistance Test shall contain the following items:

- Identification of connection specimens submitted for this test;
- Description of any excluded connections, as required in [14.2.5](#);
- Material safety data sheet for applied thread compound;
- Photographs of make-up equipment and at least one connection being made up;
- Photographs of at least one connection before and after doping (but before make-up);
- Consecutive number, date and time for each make-up and break-out;
- Targeted and achieved torques in each make-up;
- Break-out torques for each break-out;
- Torque-turn curves for all make-ups and break-outs;
- Observations of connection seal and thread surfaces upon each break-out;
- Photographs of at least one undamaged connection cleaned after break-out;
- Photographs of the connections that were representative of the worst post-break-out conditions (with or without galling) of pin and box seal and thread surfaces;
- Description and photographs of all occurrences of galling and performed repairs.

14.4 Thermal cycle test

14.4.1 Task description

The thermal cycle test is a full-scale test conducted on four specimens of the candidate connection (3.7). This test constitutes Task 4.2 of the TWCCEP evaluation procedure (see Figure 6). This task does not contain any subtasks.

Execution of Task 4.2 is mandatory.

Results of this test are key performance measures that are compared with TWCCEP threshold performance requirements (3.45).

The following Clauses describe the rationale, scope, set-up, data, and performance requirements for the thermal cycle test:

- 14.4.2 Rational and objectives
- 14.4.3 Thermal cycle specimens
- 14.4.4 Scope of thermal cycle test
- 14.4.5 Mechanical strain compensations
- 14.4.6 Set-up and instrumentation
- 14.4.7 Test procedure
- 14.4.8 Performance assessment
- 14.4.9 Selection of cycled specimens for bend test and limit-strain test
- 14.4.10 Reporting

14.4.2 Rationale and objectives

The thermal cycle test is considered to be the most severe test in the TWCCEP test matrix. This test is conducted to evaluate a candidate connection's structural integrity and sealability under cyclic thermo-mechanical loading representing a thermal-well application, as described in 9.1. Conceptually, the test is configured to simulate a section of casing that is constrained at the ends and subjected to temperature excursions with associated internal pressure loading. The end supports control and limit the casing's axial expansion and contraction during the test.

Inside the supported section, constrained heating induces axial compression due to conversion of thermal-expansion strain into compressive mechanical strain. Constrained cooling induces tension due to conversion of the thermal-contraction strain into tensile mechanical strain. The axial force acting along the supported section results from the overall deformation of the casing, and is constant in that section. The strain distribution in the casing depends on the temperature profile along the supported section. It is desirable that the temperature distribution be as uniform as possible along a strain-monitoring length that spans all included specimens.

A straight casing configuration is used for this test. This selection is based on results from studies conducted during TWCCEP development, which indicate that the impacts of the thermally-induced axial loads on seal contact stress are in general substantially larger than the impacts of the non-axisymmetric loads considered within typical thermal-well operational scenarios that do not include significant geo-mechanical loads.

14.4.3 Thermal cycle specimens

Four connection specimens (3.12) shall be subjected to the thermal cycle test:

- Specimen 3, which is a make-break specimen made up three times;
- Specimen 4, made up only once;
- Specimen 5, which is a make-break specimen made up three times;
- Specimen 6, made up only once.

Collectively, these specimens are referred to as thermal cycle specimens (3.43).

Thermal cycle specimens may be tested individually or in string assemblies containing two or four specimens, as described in 14.4.6. The specimens assembled for a thermal cycle test are collectively referred to as a specimen string (3.37). Unless noted otherwise, provisions for a specimen string apply to all specimen configurations allowed for this test (i.e. an individual specimen, a two-specimen string, or a four-specimen string).

All thermal cycle specimens shall have their secondary seals disabled per 14.2.3 and their seepage detection ports drilled as per 14.2.4. Any spares substituted for those specimens shall have their secondary seals similarly disabled and seepage detection ports similarly drilled.

14.4.4 Scope of thermal cycle test

Each specimen string shall be subjected to 10 thermal cycles in which global strain is controlled and maintained at close-to-zero values over a portion of the specimen string including all connections in that string, and in which the string temperature is controlled and varied between a low target temperature prescribed as low cycle temperature (3.27) and a high target temperature prescribed as high cycle temperature (3.21). In each cycle, the specimen string is held in compression at the high cycle temperature for a prolonged time (high-temperature hold) and subsequently in tension at the low cycle temperature (low-temperature hold).

The evaluator shall select a single temperature between 5°C and 40°C for the low cycle temperature, which shall remain fixed for the entire thermal cycle test. In order to facilitate test control, the selected low cycle temperature should be as close as reasonably possible to the average ambient temperature in the test laboratory during the thermal cycle test.

The high cycle temperature shall be not lower than, and as close as reasonably possible to, the upper-bound temperature of the ASL selected for the evaluation program.

Any pre-test exposure of the test specimens to elevated temperatures should be carefully considered, to minimize chances for any significant changes of the specimen material properties that would be inconsistent with the operational loading scenario.

The loading sequence for the thermal cycle test is illustrated in Figure 18 and later specified in Table 24 in 14.4.7.2. The top chart in Figure 18 shows the relationship between the average string strain (3.4) and the average string temperature. The bottom chart in Figure 18 shows the relationship between the thermally-induced mechanical strain and the average string temperature. The temperature axes of the top chart and the bottom chart are aligned.

The basic path corresponding to a thermal cycle between the low cycle temperature T_{lc} and the high cycle temperature T_{hc} at a constant zero strain is path QRQ.

In order to compensate for approximations that result from laboratory simulations of the intended field loading, two mechanical strain compensations are applied in addition to the above basic load path: lower-bound temperature strain increment (LTTS) and temperature range strain increment (SRI). Inclusion of those two mechanical-strain compensations modifies the cyclic load sequence to path PQRSWQP (Figure 18). Point S represents a high-temperature hold. Point P represents a low-temperature hold. Path

QWX represents unloading to zero load upon completion of the last cycle. The *LTTS* and *SRI* compensations are derived in 14.4.5.

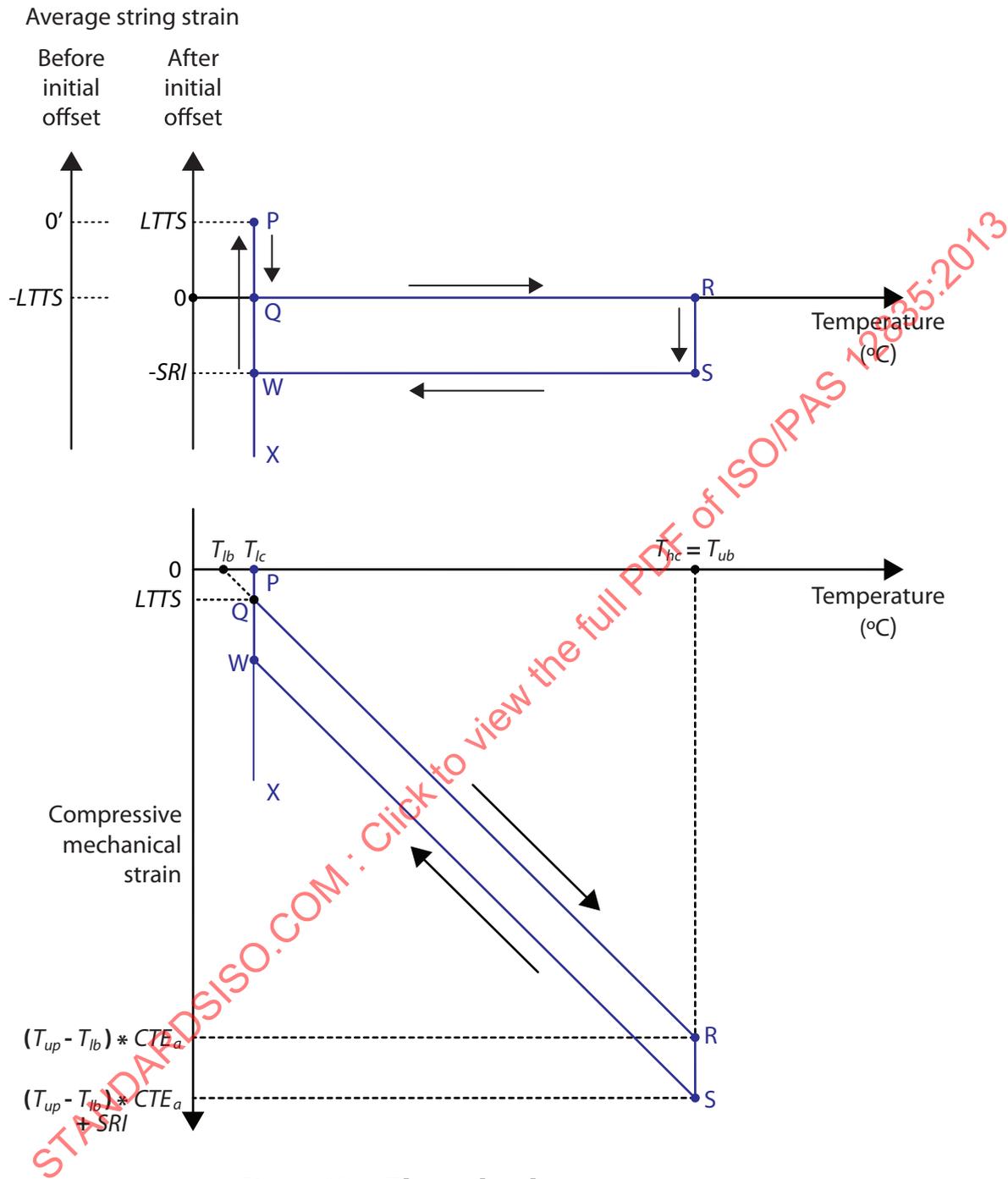


Figure 18 — Thermal cycle test sequence

14.4.5 Mechanical strain compensations

14.4.5.1 General formulas

The following mechanical strains are applied to account for differences between the casing string configuration in a well and the specimen string in a thermal cycle test:

- Difference between the low cycle temperature T_{lc} used in the test and the lower-bound temperature T_{lb} assumed for the field conditions and defined by the selected ASL is compensated by applying an additional mechanical strain referred to as lower-bound temperature strain increment *LTTS*;

- Potential non-uniformities in the heat distribution along the specimen string, strain localization effects, and inaccuracies of temperature compensation of the elongation-measuring devices, are collectively addressed by applying an additional mechanical strain referred to as temperature-range strain increment *SRI*;
- Constrained thermal expansion within a given temperature excursion causes a bigger mechanical strain in the test string than in the well string, due to the difference in length between casing joints (well) and pups (specimen string). Unless pipe body strain is directly controlled in the test, this effect is compensated by reducing the *SRI* increment by a strain offset referred to as strain-length compensating factor *SLCF*. The *LTTS* compensation is not affected by the strain-length effect, because the specimen string is not subjected to constrained thermal expansion between T_{lb} and T_{lc} .

Based on the above, the following general formulas are used for *LTTS* and *SRI*:

$$LTTS = LTTS_0 \quad (3)$$

$$SRI = SRI_0 - SLCF_S \quad (4)$$

where $LTTS_0$ and SRI_0 are strain increments based on the applicable temperature range, $SLCF_S$ is the corresponding strain-length compensating factor, and *LTTS* and *SRI* are the strain compensations applicable in the thermal cycle test procedure (see [Table 24](#)). Formulas for *SLCF*, *LTTS* and *SRI* are given in [14.4.5.2](#), [14.4.5.3](#) and [14.4.5.4](#). Derivation of *SLCF* and examples of calculations for *LTTS* and *SRI* are provided in [Annex B](#). All strain compensation factors apply to pipe body strains.

The evaluator shall report the input parameters and the resultant calculations for the *LTTS* and *SRI* strain compensations in the evaluation report.

In all strain compensation formulas, the average value of the thermal expansion coefficient (CTE_a) shall be assumed as the relevant mean of the local CTE values at the two temperatures bounding the applicable temperature range, as determined in Task [3.2](#) Material Property Verification (see [13.3](#)). Downward extrapolation of measured CTE values might be required to determine the local CTE value at 5°C.

Application of *LTTS* and *SRI* strain compensations might require alterations to the testing sequence prescribed by [Figure 18](#) and [Table 24](#). For some geometry-length combinations, $SLCF_S$ might be larger than SRI_0 . If *SRI* becomes negative, it shall be applied before the relevant boundary of cyclic temperatures is reached. Such application sequence is required to avoid introducing excessive high-temperature strain, which might be caused by holding the length of the controlled elongation interval (see [14.4.6.2](#)) constant until time to apply an adjustment strain; and to avoid unloading of the specimen string while arriving at the prescribed target strain. If an alteration of the test sequence is required, any such alteration shall be agreed between the assigner, the supplier and the evaluator.

Either positive or negative *LTTS* and/or *SRI* compensations of absolute magnitude less than 50 microstrains can be ignored, subject to agreement among the assigner, the supplier and the evaluator.

14.4.5.2 Strain-length compensating factor

If a controlled elongation interval ([3.13](#)) in a thermal cycle test contained only casing pipe of uniform strength, and so did the field's wells, the strain during testing could be matched to the field strain just by holding length of the controlled elongation interval constant during all heating and cooling load steps in the test. The same approach would be equally valid if the proportions of stiff intervals (central regions of connections) to casing pipe lengths were the same in a test as in the field. That simplicity is lost when the proportions of stiff intervals to casing pipe lengths are not the same in both instances, and corrections must be made to preserve strain similarity in the differing lengths of pipe.

The corrections to achieve strain similarity are achieved by introducing a strain-length compensating factor $SLCF$:

$$SLCF = \Delta T * CTE_a \left(\frac{L_{therm}^{test}}{L_{mech}^{test}} - \frac{L_{therm}^{field}}{L_{mech}^{field}} \right) \quad (5)$$

where

ΔT is the applicable temperature range;

CTE_a is the average value of the thermal expansion coefficient in the temperature range ΔT ;

and where the following length parameters depend on the specimen string configuration selected for the thermal cycle test (see 14.4.6) and the field configuration simulated by that specimen string configuration:

- L_{therm}^{test} is the length of the controlled elongation interval;
- L_{mech}^{test} is the length assumed to be deforming appreciably under mechanical forces in the test configuration, which is somewhat shorter than L_{therm}^{test} ;
- L_{therm}^{field} is the thermal-expansion length in the field configuration that is simulated in the test configuration (i.e. having the same number of connections), based on an assumed pipe joint length of 12.5 m (41 ft);
- L_{mech}^{field} is the length assumed to be deforming appreciably under mechanical forces in the field configuration, which is somewhat shorter than L_{therm}^{field} .

The evaluator shall determine, or be responsible for determining, an effective stiff length of the candidate connection. L_{mech}^{field} shall be adopted as L_{therm}^{test} minus a number of effective stiff lengths equal to the number of connections within the controlled elongation interval. L_{therm}^{field} shall be adopted as the typical pipe joint length of 12.5 m (41 ft) times the number of connection specimens within the controlled elongation interval (one or two or four). L_{mech}^{field} shall be adopted as L_{therm}^{field} minus the same number of the effective stiff lengths as contained within the controlled elongation interval.

Annex B provides a list of assumptions and resultant derivations of the formulas for calculating the length parameters listed above and the $SLCF$. If any of the assumptions adopted for those calculations are considered invalid in a particular evaluation program, then the assigner, the supplier and the evaluator shall agree on measures needed to account for those discrepancies in the evaluation procedure.

14.4.5.3 Lower-bound temperature strain compensation

The lower-bound temperature strain increment ($LTTS$) accounts for the difference between the test low cycle temperature T_{lc} and the lower-bound temperature T_{lb} defined by the ASL.

It is considered impractical to specify the ASL lower-bound temperature (5°C) to be a uniquely prescribed low cycle temperature, because most laboratories would have to employ powerful cooling systems to bring the string temperature down to that temperature in every cycle. Instead, the TWCCEP allows for selecting a higher low cycle temperature, and prescribes applying an additional mechanical strain to account for the difference between the selected low cycle temperature and the ASL lower-bound temperature. This additional strain is first applied in compression at the low cycle temperature to simulate compression that the specimen string would have undergone had the test begun at the ASL

lower-bound temperature. Upon return to the low cycle temperature at the end of each thermal cycle, the same amount of strain is applied in tension.

The additional strain $LTTS_0$ resultant from constrained thermal expansion between T_{lc} and T_{lb} in a field configuration is equal to:

$$LTTS_0 = (T_{lc} - T_{lb}) * CTE_a * \left(\frac{L_{therm}^{field}}{L_{mech}^{field}} \right) \quad (6)$$

The corresponding strain in a test configuration is equal to the same strain as in the field configuration, because the test string does not experience any constrained thermal expansion in the temperature range from T_{lb} to T_{lc} . Based on the above, the following $LTTS$ strain compensation shall be applied in the test procedure:

$$LTTS = (T_{lc} - T_{lb}) * CTE_a * \left(\frac{L_{therm}^{field}}{L_{mech}^{field}} \right) \quad (7)$$

After the strain compensation $LTTS$ is first applied as a compressive strain at the beginning of the test, the strain-measuring system is offset to indicate zero strain with the $LTTS$ applied. This offset sequence results in a vertical shift of the average-strain axis in [Figure 18](#): from origin 0' (before the initial offset) to origin 0 (after the initial offset).

14.4.5.4 Temperature range strain compensation

The temperature range strain increment SRI is introduced to account for potential non-uniformities in the heat distribution along the specimen string, strain localization effects, and inaccuracies of temperature compensation of the elongation-measuring devices. All those potential impacts are considered to depend on the applied temperature range. The TWCCEP specifies a collective strain compensation that amounts to 10 % of the mechanical strain associated with the thermal strain corresponding to the temperature range between the lower-bound temperature and the upper-bound temperature for the selected ASL:

$$SRI_0 = 10\% * (T_{ub} - T_{lb}) * CTE_a * \left(\frac{L_{therm}^{field}}{L_{mech}^{field}} \right) \quad (8)$$

The corresponding strain-length compensating factor is equal to:

$$SLCF_S = (T_{ub} - T_{lb}) * CTE_a * \left(\frac{L_{therm}^{test}}{L_{mech}^{test}} - \frac{L_{therm}^{field}}{L_{mech}^{field}} \right) \quad (9)$$

Based on the above, the following SRI strain compensation shall be applied in the test procedure:

$$SRI = (T_{ub} - T_{lb}) * CTE_a * \left(0.1 * \frac{L_{therm}^{field}}{L_{mech}^{field}} - \left(\frac{L_{therm}^{test}}{L_{mech}^{test}} - \frac{L_{therm}^{field}}{L_{mech}^{field}} \right) \right) \quad (10)$$

See applicable provisions in [14.4.5.1](#) if the above expression yields a negative value.

14.4.6 Set-up and instrumentation

14.4.6.1 Test configuration

Allowable test configurations are:

- one single string of four specimens,
- two strings of two specimens,
- four individual specimens.

When thermal cycle specimens are tested in two strings of two specimens, one string shall contain Specimen 3 and Specimen 4 and the other string shall contain Specimen 5 and Specimen 6 (this configuration requirement for two strings is to ensure specimen selection procedures in 14.4.9 work in all cases).

As defined in 3.37 and described in 14.4.3, the term specimen string refers to either an individual specimen or multiple specimens assembled in series.

The allowable test configurations are illustrated in Figure 19. For each configuration, Figure 19 shows a corresponding length of the controlled elongation interval (as defined in 3.13 and described in 14.4.6.2).

The length requirements for the controlled elongation interval are shown only for one end of the 4-specimen string assembly. The same requirements apply to both ends of any specimen string and to all test configurations.

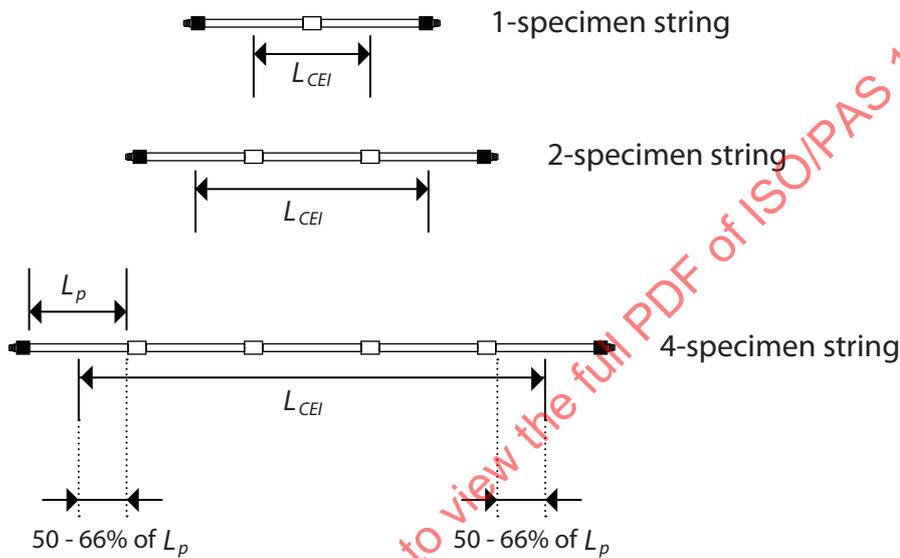


Figure 19 — Allowable configurations for thermal cycle test

14.4.6.2 Controlled elongation interval

In order to control global (and average) strain of a specimen string, axial deformation of the specimen string (i.e. its elongation or shortening) shall be measured and controlled over an interval that is referred to as the controlled elongation interval (3.13). The controlled elongation interval shall:

- include all connections assembled in the specimen string (can be one, two, or four couplings); and all intermediate pups between adjacent connection specimens assembled in-series; and
- at least half but no more than two-thirds of each casing pup between an end fixture and the nearest connection specimen;
- be wholly included in the insulated portion of the specimen string (and thus be at “uniform” temperature during the various stages of the test).

Instrumentation used to control axial deformation in the controlled elongation interval shall be configured so that no significant loss of accuracy results from temperature effects due to cyclic heating and cooling of the specimen string. Variations less than $\pm 3\%$ of the controlled elongation interval’s free thermal expansion determined from the measured average thermal expansion coefficient CTE_a shall be considered acceptable (note that global strain is primarily controlled to be zero in the thermal cycle test).

Control of a specimen string’s elongation within the controlled elongation interval should be based on measurements acquired by linear potentiometers sufficiently far from the insulated surface of the

specimen string to minimize heat effects on the instruments. Two potentiometers on circumferentially opposing sides of the specimen string should be used to provide an indication of any string curvature developing in the plane of the instruments, and to provide elongation measurements insensitive to any curvature effects by averaging the two potentiometers' outputs.

When possible and practical, strains in individual casing pups should be acquired, so that strain distribution along the specimen string could be assessed, and local strains could be compared with the Average string strain within the controlled elongation interval. Additionally, connection loads imposed during the thermal cycle test will be much less susceptible to any error in determination of the difference between and , if testing control emphasizes strains in individual casing segments over strain in the controlled elongation interval, when differences might arise.

14.4.6.3 Effective string length

For the purpose of controlling strain in a specimen string, an effective string length (3.14) shall be adopted equal to length that is assumed to be deforming appreciably under mechanical forces in the thermal cycle test, which is introduced in 14.4.5 and calculated according to formulas in Annex B:

$$\text{Effective string length} = L_{mech}^{test} \quad (11)$$

The above formulation of the effective string length is considered suitable for application of the mechanical strain compensations in a thermal cycle test. Use of the effective string length for other purposes shall be agreed between the assigner, the supplier and the evaluator.

The TWCCEP requires that for each specimen string, the relationship between the elongation in the controlled elongation interval and the strain imposed by mechanical tension and compression be verified prior to test commencement. This might be done by applying modest axial loads to the specimen string (within 30 % to 50 % of pipe body yield) and comparing the load-elongation-strain measurements to results obtained from closed-form load-deformation and stress-strain formulas; or by an alternative method as agreed by the assigner, the supplier, and the evaluator.

Strain gauges and/or local-strain measuring devices should also be placed on individual casing pups to relate global elongation measurements to local strains.

The assumed effective string length and the verification measurements shall be reviewed by the evaluator and the inspector to verify accuracy of the strain control system.

The evaluator shall report the determined effective string length and the acquired verification measurements in the evaluation report.

14.4.6.4 Average string strain

Average string strain (3.4) shall be used to control loading of a specimen string in the thermal cycle test.

Average string strain shall be calculated by either of the following alternatives:

- If elongation of the controlled elongation interval is measured but strains in individual casing pups are not measured, calculate the average string strain by dividing the elongation of a specimen string within the controlled elongation interval by the effective string length.
- If elongation of the controlled elongation interval is measured and pipe strains in individual casing pups are directly measured without including stiff lengths in the strain measurements, determine the average axial strain based on the combination of the acquired elongation and strain measurements as agreed by the assigner, the supplier, and the evaluator.

As mentioned in 14.4.5.1, expressions provided for *LTTS* and *SRI* apply to pipe body strains. If the latter method of obtaining average string strain (from the two methods listed above) is employed, the expressions for *LTTS* and *SRI* might have to be adjusted depending on the method of controlling the average string strain, as agreed by the assigner, the supplier, and the evaluator.

14.4.6.5 Axial force

Axial force acting on each specimen string shall be measured and recorded throughout each thermal cycle test.

When a single specimen string is tested in a hydraulically-driven testing system, axial force can be measured using differential pressure acting on the hydraulic actuator, provided no appreciable axial force is reacted by the end fixtures installed between the actuator and the specimen string, a redundant force measurement by a load cell installed in-series with the specimen string is strongly recommended, since the actuator might not be free of frictional drag if the piston becomes misaligned in its cylinder.

For multiple strings tested in parallel, axial force in each specimen string shall be measured independently.

Load cells used for axial force measurement shall be configured so that no appreciable loss of accuracy results from temperature effects due to cyclic heating and cooling of the specimen strings. Temperature-compensated instrumentation should be used, or the load cells should be cooled to minimize temperature-related loss of accuracy, or both of these techniques might be utilized. Load cell errors less than $\pm 3\%$ of the true force shall be considered acceptable. Differences larger than $\pm 3\%$, between axial force measured by a load cell and axial force measured by actuator pressure, should be investigated and resolved.

14.4.6.6 String insulation

Each specimen string shall be covered with thermal insulation to minimize heat loss at elevated temperature and to distribute the heat as uniformly as possible along the string.

The insulation shall cover the entire controlled elongation interval, plus an additional length of at least one pup diameter beyond each end of the controlled elongation interval.

14.4.6.7 Heating

Heating of the specimen string may be accomplished by any means capable of producing sufficiently high temperatures throughout the length of the specimen string, such as heat pads or induction heating. The heating apparatus shall not induce substantial temperature differences between components of the specimen string, in particular between adjacent specimens or between adjacent pins and boxes.

Rate of temperature change at any thermocouple location along the specimen string during heating shall not exceed 5°C (9°F) per minute.

14.4.6.8 Cooling

Cooling of the specimen string from the high cycle temperature to the low cycle temperature by ambient air might take a long time, which is likely to be undesirable in most evaluation programs. The TWCCEP permits the following cooling options:

- natural cooling by ambient air;
- accelerated cooling by forced convection cooling with ambient air;
- accelerated cooling by circulating water or other cooling fluid inside or outside the string, as long as it does not interfere with the leakage detection system.

The cooling fluid should be restricted from contacting hot connection surfaces. For example, this can be accomplished by circulating the fluid inside a mandrel that is inserted inside the specimen string (also see comments about the internal mandrel). The cooling apparatus shall not induce substantial temperature differences between components of the specimen string, in particular between connected pins and boxes.

The assigner, supplier and evaluator shall agree on either natural or accelerated cooling at the onset of the evaluation program.

Rate of temperature change at any thermocouple location along the specimen string during cooling should not exceed 5°C (9°F) per minute.

14.4.6.9 Temperature measurements

Temperature of the specimen string shall be measured by thermocouples. Multiple thermocouples shall be used to permit assessment of temperature distribution along the specimen string and facilitate controlled input of heat during temperature excursions.

As a minimum, thermocouples shall be placed in the following axial locations of the specimen string inside the controlled elongation interval:

- on casing pup bodies within 10 cm (4 in) from each connection, with the distance measured from each box face or, for integral connections, from the external upset;
- for threaded-and-coupled connections, at the axial centre of each coupling; for integral connections, near the axial centre of the increased-diameter interval of the box component;
- in the centre of each pup belonging to two specimens within the specimen string;
- on casing pup bodies at ends of the controlled elongation interval.

Additional thermocouples may be placed outside the controlled elongation interval, or anywhere else, to provide enhanced data on temperature distribution along a specimen string.

At least one thermocouple shall be placed in each axial location. Redundant thermocouples may be placed around any circumference to ensure continuing measurements in case of thermocouple failure.

Circumferential location of a thermocouple may be arbitrary when a specimen string is tested in a vertical orientation. For horizontal testing orientation, thermocouples should be located as close as practical to the horizontal symmetry plane of the specimen string.

All thermocouples except those that have failed shall be considered active thermocouples.

Failed thermocouples within the controlled elongation interval shall be replaced as soon as it is practical to do so. Failed thermocouples outside the controlled elongation interval should also be replaced. Use of pre-installed, redundant thermocouples is equivalent to thermocouple replacement.

14.4.6.10 Internal mandrel

A pressure-tight internal mandrel or filler bar may be inserted inside each specimen string ([3.37](#)).

Rationale for the use of the mandrel or filler bar is to:

- reduce the volume of gas used to pressurize the string, and consequently reduce the energy stored in the compressed gas;
- provide additional bending stiffness to reduce potential for local buckling of the specimen string under compression;
- optionally, when a hollow mandrel is used, provide a conduit for circulating cooling fluid. The circulation of fluid through the mandrel allows accelerated cooling of the specimen string in each thermal cycle.

The internal mandrel should be dimensioned to reduce the internal specimen string volume significantly but shall not result in any mechanical interference with the connection specimens. The internal mandrel should provide sufficient lateral support to resist the specimen string's column buckling tendencies and keep the specimen string as straight as practical.

To maximize specimen string straightness, the mandrel should be sleeved or shimmed at each tested connection, if necessary, to leave its effective outside diameter no larger than the specimen string's drift diameter and no smaller than the drift diameter minus 2 mm (0.080 in). The mandrel should be sleeved

or shimmed at both ends, if necessary, such that diametric clearance is between 2 mm and 4 mm at those locations. If used, sleeves or shims shall be firmly attached to the mandrel and long enough to account for relative movement.

Some additional mandrel design guidelines are:

- The mandrel shall be resistant to collapse at pressures and temperatures corresponding to the high cycle temperature.
- The mandrel should be as long as possible while allowing for end clearance and accounting for thermal expansion differences between the specimen string and the mandrel.
- Temperature degradation of the mandrel's strength should be accounted for in the design.
- Design conservatism of the mandrel should be generous as mandrel failure would be detrimental to the evaluation. Possible conservatism could include:
 - assuming the specimen string is moment-free at end fixtures, intermediate supports and other contacts points between the specimen string and the mandrel;
 - estimating the specimen string's maximum axial load conservatively and assuming maximum possible lateral displacement of the specimen string;
 - including the mandrel's calculated bending stress in collapse calculations and using large design factors.
- Mandrel lateral deflection should be minimized, with calculated lateral deflection no larger than 1/200th of the span between lateral restraints being a realistic design goal if the mandrel is considered a simple beam between each pair of lateral restraints. One or more laterally stiff external supports should be considered if this deflection design goal cannot be achieved without such external supports. External supports should not contact the specimen string within one pipe diameter of any connection specimen.

14.4.6.11 Internal pressure

Internal gas pressure shall be applied with a dry, inert gas such as nitrogen. As an option, a 5 % helium tracer gas may be added.

Internal pressure in each specimen string shall be measured continuously during the test and recorded by the data acquisition system.

14.4.6.12 Data acquisition

A computerized data acquisition system shall be used.

As a minimum, the following data shall be acquired and recorded continuously during each test, except for test maintenance periods:

- Temperatures at all thermocouple locations;
- Elongation of the specimen string within the controlled elongation interval (this should be equal to zero or *LTTs* for most load steps);
- Average string strain (calculated from the elongation measurement above);
- Axial stroke of the test frame actuator;
- Axial force imposed on the specimen string;
- Internal pressure;
- Seepage from each connection;

- Date and time.

14.4.6.13 Test frame and instrumentation checks

Integrity of the test assembly and accuracy of instrumentation measurements shall be checked, and where possible also verified, prior to test commencement.

As a minimum, the scope of the assembly checks shall include:

- Specimen string elongation measurements and/or other measurements to be used for strain control;
- Specimen string pressure integrity (e.g. by applying axial compression-tension and internal pressure up to 10 % of equivalent yield stress);
- Pressure integrity of the internal mandrel;
- Connectivity and clearance of seepage measurement lines;
- Functioning of data acquisition system.

14.4.7 Test procedure

14.4.7.1 Specimen configuration

The thermal cycle specimens shall be tested either individually or in a string assembly. In any configuration, all thermal cycle specimens shall be subjected to the same load steps, as described below.

14.4.7.2 Load steps

[Table 24](#) contains the load steps for the thermal cycle test. Path indicators (points P, Q, R, S, W, and X) indicated in [Table 24](#) are consistent with [Figure 18](#). Symbols used in [Table 24](#) are explained in [4.2](#).

Average pipe strain upon test initiation in load step 0.1 is indicated as 0", because the zero-strain position is reset ("re-zeroed") twice in later load steps. The first such reset takes place in load step 0.5, after a series of elastic loading and unloading. That re-zeroed strain is denoted as 0'. The second strain reset takes place in load step 0.8, after the *LTTS* strain compensation is applied. The zero-strain position after that load step is denoted as 0. The 0'-strain and 0-strain positions are illustrated in [Figure 18](#).

In load step 0.3 and load step 0.4, axial forces are applied by mechanical compression and tension to target force magnitudes $-F_{33}$ % and $+F_{33}$ %, which respectively denote the compressive and tensile axial force that together with the capped-end pressure loading produces equivalent stress equal to 33 % of the pipe-body nominal yield strength at room temperature.

In all other load steps of the thermal cycle test that involve non-zero axial loads, the magnitudes of those axial loads shall result from the controlled temperature excursions, strain compensations, and internal pressure.

Internal pressure shall be applied as indicated in [Table 24](#). For the majority of the load steps, the target pressures correspond to the saturated-steam pressure-temperature relationship (see [9.2](#) and [9.3](#)), although in some load steps an arbitrary pressure value has been selected for practical reasons. In the load steps that involve changes of both pressure and temperature, those changes should be applied so that the saturated-steam pressure-temperature relationship is followed as closely as practical. It is acknowledged that the sequence of the pressure and temperature application in the thermal cycle test is somewhat different from the corresponding sequence used in Task 2.2 Specimen Configuration Analysis ([12.3.1](#)), for reasons explained in [6.5.7](#).

Average string strain ([3.4](#)) in [Table 24](#) refers to the average axial strain of the specimen string, as defined in [14.4.6.4](#). In order to achieve pipe body strain in the specimen string that is equivalent to the pipe body strain in the simulated field configuration, the target strains in the test procedure are compensated for

strain-length effects and other influencing factors by applying *LTTS* and *SRI* compensation factors, as determined in [14.4.5](#).

In load step 1.3, the default hold time is 120 hours. This hold constitutes the specimen bake-out, which is prescribed to allow temperature- and time-dependent property changes to occur in the test specimens (e.g. changes in dope consistency and steel relaxation), so that their condition is representative of connections subjected to long-term field loading (see [6.5.6](#)). Given that those property changes in general depend on external loading, it is strongly recommended to conduct the first specimen bake-out under compression.

If conducting the default hold under compression is not possible for practical or other reasons, then by agreement between the assigner, the supplier, and the evaluator, a pre-test bake-out may be conducted on each specimen in an unconstrained condition prior to the thermal cycle test. In that case, the duration of the hold in load step 1.3 shall be the longer of 4 hours and the difference between 120 hours and the pre-test bake-out. If the thermal cycle test is conducted on individual specimens, this provision shall apply to each specimen separately. If the test is conducted on a multi-specimen string, then the hold in load step 1.3 shall correspond to the longest duration required for the specimens included in that string.

In load step F.1, average string strain measured after completion of the last thermal cycle and during unloading of the specimen string from zero average string strain (point Q in [Figure 18](#)) to zero load (point X in [Figure 18](#)) is assumed as a residual post-cycle strain. The absolute magnitude of that strain is denoted as *ETTE*. Typically, the residual post-cycle strain can be expected to be compressive, in which case “-*ETTE*” will be a negative value.

If the thermal cycle test is conducted on a single 4-specimen string, then the *ETTE* value obtained for that string shall be adopted as the average post-cycle strain *ETTE_a*, for use in the limit-strain test. If the thermal cycle test is conducted on multiple strings, then *ETTE_a* shall be calculated as the average of the *ETTE* values obtained for all specimen strings. For example, if upon unloading from point Q to point X, average string strain changes from 0 to -500 microstrains, then the value referenced as -*ETTE* in [Table 24](#) will be -500 microstrains. If this strain magnitude is also assumed for the average post-cycle strain, then the *ETTE_a* value used in the limit-strain test (see [Table 26](#) and [Table 27](#)) will be +500 microstrains.

14.4.7.3 Criteria for achieving target temperatures

Prior to beginning any hold interval, temperatures measured by all thermocouples inside each controlled elongation interval shall be within the following limits:

- at pipe body locations: within $\pm 10^{\circ}\text{C}$ from the specified target temperature;
- at coupling locations and within increased-diameter sections of integral-connection boxes: from -20°C to $+10^{\circ}\text{C}$ from the specified target temperature.

Best effort shall be exercised to keep all temperatures inside each controlled elongation interval within the above limits throughout the duration of each hold.

14.4.7.4 Permanent deformation of test pipes

While the TWCCEP prescribes consistent specifications for geometrical and material properties of all thermal cycle specimens, some variations of those properties might still occur, and lead to strength contrasts between individual specimen components. During thermal cycles, loading of the specimen string is controlled on global strain, and strength contrasts between individual pups might lead to strain localization and non-uniform distribution of plastic strain.

The TWCCEP recommends that the permanent deformation (plastic strain) remaining after the thermal cycle test should be assessed for each casing pup of each thermal cycle specimen. This assessment is recommended to indicate if any significant strain localization occurred in the specimen components (possibly due to circumstances outside of TWCCEP specifications). Such information might be useful as auxiliary performance data and/or in excluded connection considerations.

Table 24 — Load steps for thermal cycle test

Load step	Cycle	Description	Path	Temp °C	Applied axial force	Average string strain $\mu\epsilon$	Internal pressure MPa	Duration Min./as noted	Comments		
0.1	0	Test initiation	P	T_{lc}	0	0"	0		Zero strain upon test initiation		
0.2		Maximum pressure hold			- F_{33} %			0	15	For comparison with limit-load test	
0.3		Elastic compression			+ F_{33} %	Resultant		$SSP(T_{hc})$	15	Approximate comparison with ISO 13679	
0.4		Elastic tension			0						
		Depressurize and release load					0			Assume current strain as zero strain after elastic loading	
0.5		Re-zero total strain			P		0'			Strain-compensation $LTTs$ is applied in compression	
0.6		Compress by $LTTs$			P-Q		Resultant	- $LTTs$	15	Compare with Specimen 1 in limit-strain test load step 0.7	
0.7		Maximum pressure									
		De-pressurize							\downarrow 0		Assume current strain as zero strain after $LTTs$ compensation
0.8		Re-zero total strain			Q			0	0		For subsequent load steps, the $LTTs$ -compensated strain is assumed as zero
0.9	Lock strain reference										

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Table 24 (continued)

Load step	Cycle	Description	Path	Temp °C	Applied axial force	Average string strain $\mu\epsilon$	Internal pressure MPa	Duration Min./as noted	Comments			
1.1	1	Heat and pressurize	Q-R	\uparrow	Resultant	0	$\uparrow SSP(T)$		Constrained heating. Compression and pressure increasing with temperature			
1.1.1		Interim temperature $T_{H1}=180^{\circ}C$		180				15	Maximum temperature to which ISO 13679 applies			
1.1.2.... 1.1.1.N		Interim temperatures from T_{H2} to T_{HN}		T_{ik}				15	$T_{ik} = 240, 290, 325, 350^{\circ}C$ for as long as $T_{ik} < T_{hc}$			
				R					Arrive and stabilize at T_{hc}			
1.2		Compress to -SRI strain	R-S				$0 \downarrow -SRI$		Strain compensation SRI is applied in compression			
1.3		High temperature hold	S					Between 4 and 120 h (Note 1)	Default hold duration is 5 days. Hold may be shorter if specimens are pre-baked prior to thermal cycle test			
1.4		Cool and de-pressurize	S-W				$\downarrow T_{lc}$		Let pressure drop with temperature. Maintain 1 MPa minimum pressure after cooling			
				W					Arrive and stabilize at T_{lc}			
1.5		Tension to zero control strain	W-Q						Strain compensation SRI is applied in tension			
1.6		Re-pressurize	Q									
1.7		Tension to lower-bound temperature strain	Q-P						Strain compensation LTTTS is applied in tension			
1.8		Low temperature hold	P				T_{lc}	120	Hold at T_{lc} is 2 h			
1.9		De-pressurize. Return to zero control strain	P-Q						De-pressurize to 1 MPa. Re-compress by LTTTS			

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Table 24 (continued)

Load step	Cycle	Description	Path	Temp °C	Applied axial force	Average string strain $\mu\epsilon$	Internal pressure MPa	Duration Min./as noted	Comments	
2.1	2	Heat and pressurize	Q-R	$\uparrow T_{hc}$	Resultant	0	$\uparrow SSP(T)$		Constrained heating. Pressure increasing with temperature	
2.2		Compress to -SRI strain	R-S	T_{hc}		0 \downarrow -SRI	$SSP(T_{hc})$		Strain compensation SRI is applied in compression	
2.3		High temperature hold	S						240	Hold at T_{hc} is 4 h
2.4		Cool and de-pressurize	S-W	$\downarrow T_c$		-SRI	$SSP(T) \downarrow 1$		Let pressure drop with temperature. Maintain 1 MPa minimum pressure after cooling	
2.5		Tension to zero control strain	W-Q	T_{lc}		-SRI $\uparrow 0$	1		Strain compensation SRI is applied in tension	
2.6		Re-pressurize	Q		0	$\uparrow SSP(T_{hc})$				
2.7		Tension to lower-bound temperature strain	Q-P		0 \uparrow LTTS	$SSP(T_{hc})$			Strain compensation LTTS is applied in tension	
2.8		Low temperature hold	P			LTTS				
2.9		De-pressurize and return to zero control strain	P-Q			LTTS $\downarrow 0$	$\downarrow 1$		Hold at T_{lc} is 2 h	
Cycles 3 to 10 identical to cycle 2										
F.1	Post-cycling	Unload to zero load and zero pressure	Q-X	T_{lc}	$\downarrow 0$	-ETTE	$\downarrow 0$		Record residual compressive strain -ETTE at zero load and zero pressure	
F.2		Re-pressurize						$\uparrow SSP(T_{hc})$		
F.3		Post-test zero load hold	X		0	Resultant		$SSP(T_{hc})$	15	Compare with limit-strain test load step 0.2
F.4		De-pressurize						$\downarrow 0$		
F.5		Test end						0		

Note 1 Select hold time according to applicable provisions in 14.4.7.2.

Recommended procedure for assessment of permanent specimen deformation:

- upon assembly of specimens for the thermal cycle test, measure distances between the two box components attached to each casing pup (coupling face or end cap face might be chosen as a convenient reference), to obtain initial undeformed lengths;
- measure the same distances after the thermal cycle test, to obtain post-test deformed lengths;
- for each pup, divide the difference between its initial undeformed length and its post-test deformed length by its initial undeformed length. This ratio can be considered representative of the permanent deformation (elongation or shortening) of that pup.

Each measured permanent pup deformation shall be reported in the evaluation report.

14.4.8 Performance assessment

The following threshold performance requirements for the thermal cycle test are provided for reference purposes in accordance with adopted principles for TWCCEP assessment criteria and result interpretation specified in [6.3.6](#) and [6.3.10](#) and in accordance with assumptions for seepage thresholds described in [6.5.3](#).

A candidate connection shall be considered to have met threshold performance requirements in the thermal cycle test if all of the following conditions have been satisfied for all connections included in the thermal cycle specimens, except any excluded connections:

- a) No structural failure has occurred;
- b) Per-connection average seepage rate for holds at high cycle temperature does not exceed 1 mL/minute;
- c) Per-connection average seepage rate for holds at low cycle temperature does not exceed 10 mL/minute.

Per-connection average seepage rate for each connection in each loading condition shall be calculated according to definitions provided in [14.2.4.3](#).

All the above seepage rate thresholds apply to each individual connection – i.e. not to a connection specimen unless it is an integral connection specimen ([3.12](#)), and not to test strings with multiple specimens.

Any seepage that exceeds 0.06 mL/minute over any 15 min interval (1 mL in 15 min) shall be identified in the evaluation report. This threshold rate is consistent with ISO 13679; the TWCCEP does not consider it to be a pass-fail criterion, but specifies it as a reportable threshold.

Average per-specimen seepage rates (i.e. for two connections in a threaded-and-coupled connection specimen) at the high cycle temperature and the low cycle temperature should be calculated and documented for information purposes.

14.4.9 Selection of cycled specimens for bend test and limit-strain test

Following completion of the thermal cycle test, the thermal cycle specimens shall be ranked according to their structural behaviour and sealability performance in the thermal cycle test, to enable selection of thermally-cycled specimens for the bending evaluation and the limit-strain test.

The following selection procedure shall be applied:

- a) remove all specimens that contain excluded connections from further selection;
- b) from the remaining set of thermal cycle specimens, select the specimen with the connection that seeped at the highest average rate at room temperature in all cycles, and designate that specimen as Specimen RX for use in Task 4.4 Limit-Strain Test;

- c) from the specimens that remain available after the selection of Specimen RX, select the specimen with the connection that seeped at the highest average rate at room temperature in all cycles, and designate that specimen as Specimen RY for use in Task 4.3.2 Bend Test.

14.4.10 Reporting

As a minimum, reporting of Task 4.2 Thermal Cycle Test shall contain the following items:

- Identification of connection specimens submitted for this test;
- Description of any excluded connections, as required in 14.2.5;
- Calculated values for strain compensations *SLCF*, *LTTS* and *SRI*;
- Overall description of the test set-up, including a schematic showing the test configuration, controlled strain interval, temperature control points, heating/cooling elements, and seepage detection points;
- Photographs of the test set-up and specimen string(s) installed in the test frame;
- Locations of installed thermocouples;
- Determined effective string length;
- Performed test frame and instrumentation checks;
- For each load step executed per Table 24, at the beginning, midpoint, and end of that load step: date and time, cycle and load step number, measured temperatures, measured deformation within controlled elongation interval, average string strain, axial force, and applied internal pressure;
- For each load step with a hold at stable conditions: hold duration, and average seepage rate in excess of 0.06 mL/min from each connection.

14.5 Bending evaluation (optional task)

14.5.1 Task description

The bending evaluation constitutes Task 4.3 of the TWCCEP evaluation procedure (see Figure 6). This task includes two subtasks: Task 4.3.1 Bending Analysis and Task 4.3.2 Bend Test. Task 4.3.1 Bending Analysis is an analytical task conducted on a computer model of the candidate connection. Task 4.3.2 is a full-scale test conducted on two specimens of the candidate connection.

Execution of either Task 4.3.1 and/or Task 4.3.2 is optional at the assigner's discretion. The decision to conduct or not to conduct those tasks shall be documented in the evaluation report.

If either Task 4.3.1 or Task 4.3.2 is carried out, then all TWCCEP mandatory provisions applicable to the performed tasks shall be satisfied. The scope of each of those tasks may be enhanced by agreement between the assigner, the supplier and the evaluator.

Results of the bending evaluation fall into the category of auxiliary performance data. None of those results are compared to threshold performance requirements. Regardless of the executed scope, all acquired results shall be documented in the evaluation report.

The following Clauses describe the rationale, scope, set-up, data, and performance requirements for Task 4.3 Bending Evaluation:

- 14.5.2 Rationale and objectives
- 14.5.3 Bending analysis
- 14.5.4 Specimens for bend test
- 14.5.5 Scope of bend test

- [14.5.6](#) Set-up and instrumentation
- [14.5.7](#) Test procedure
- [14.5.8](#) Performance assessment
- [14.5.9](#) Reporting

14.5.2 Rationale and objectives

Casing strings in curved thermal-well sections experience non-axisymmetric forces that result from curvature loading. Magnitudes and impacts of those loads depend on wellbore configuration, cement support, and axisymmetric loading components. For example, if a deviated section of the casing string is supported continuously by the cement sheath, then lateral forces are uniformly distributed along the string, and connections in that section experience curvature loading with little or no shear. If the cement support is not continuous in an interval, then a coupling within that interval might be in contact with the wellbore while the pipe adjacent to that coupling might be laterally unsupported. The coupling is then subject to a shear force corresponding to the lateral force acting along the unsupported casing length. Another potential source of non-axisymmetric bending can be associated with geo-mechanical deformations; for example, shear displacements imposed on casing and connections by lateral formation movements. Non-axisymmetric downhole forces on casing strings might be further compounded by axial compression and tension during thermal cycling.

While the severity of bending effects is path-dependent (it depends on the sequence of application of all the load components resulting from curvature, shear, eccentric axial forces, temperature, and pressure), it can be postulated that bending impacts in competently-supported casing are mostly mitigated by the constrained heating of the casing in the first operational cycle. During that first heating the pipe body will yield and accommodate the curvature with little residual bending moment acting on the connection. In that case, the connection will experience close-to-axisymmetric axial loading in subsequent cycling. Nonetheless, severity of the bending loads acting on casing connections downhole might vary depending on specific operational conditions, such as hole profile, hole condition (e.g., washouts), heating and cooling extremes, and casing-formation interactions. For many connection designs, those loads might lead to variations of seal contact stress around the connection circumference. Impacts of such circumferential variations in the stress distribution, intensity, and gradients cannot in general be fully assessed by approximate or interpolated axisymmetric analysis and/or testing.

The assigner should carefully consider intended applications of the candidate connection, and select the bending evaluation options accordingly. The TWCCEP recommends that at least one bending evaluation task should be performed whenever one or more of the following circumstances occur:

- Severe curvature loading is expected during casing string installation and/or subsequent production. While impacts of a specific curvature loading on a connection performance will in general be design-dependent, curvatures causing pipe body stress in excess of 50 % of the pipe body yield can be considered severe;
- Geo-mechanical loading of the casing string is expected due to formation movements;
- The candidate connection is being qualified for a variety of applications;
- The candidate connection ([3.7](#)) is being qualified for an application in which a significant increase of curvature loading is anticipated, when compared with historic use of that connection.

The objectives and scope of the bending evaluation may vary depending on the applicable rationale for conducting that task, the anticipated severity of bending loads, the possibility of experiencing shear loading in the intended application, and the practicality of simulating those loads using either analytical modelling or laboratory testing.

The TWCCEP recommends the following basic set of objectives for the bending evaluation:

- verify the candidate connection's structural integrity and sealability under curvature loading commonly encountered in thermal well service;

- assess the candidate connection's structural limits and sealability limits under increasingly severe curvature loading.

The above set of basic objectives does not address impacts of formation shear, because formation shear was not identified as a widespread operational concern during development of this TWCCEP edition.

If either Task 4.3.1 or Task 4.3.2 or both tasks are selected for execution, it is recommended they be conducted in the following manner:

- If selected, perform Task 4.3.1 Bending Analysis to simulate the response of the candidate connection to bending and curvature loading under the anticipated field conditions. Carry out a parametric analysis to determine critical combinations of the design and loading variables;
- If Task 4.3.1 Bending Analysis has been performed, use the results from that task to guide selection of specimens and loading for Task 4.3.2 Bend Test;
- If Task 4.3.1 has not been performed, execute Task 4.3.2 Bend Test according to the default test procedure per [14.5.4](#), [14.5.5](#), and [14.5.7](#).

14.5.3 Bending analysis

NOTE This Clause is intended for development and inclusion in future TWCCEP revisions.

14.5.4 Specimens for bend test

If Task 4.3.1 Bending Analysis has been performed, then specimen choice for the bend test might be influenced by the bending analysis results. Otherwise, as a default, two connection specimens should be subjected to the bend test:

- Specimen 2, a make-break specimen that has not been thermally cycled;
- Specimen RY, a thermally cycled specimen (see [14.4.9](#) for selection procedure for Specimen RY).

Collectively, the above two specimens are referred to as bend test specimens ([3.5](#)).

Specimen 2 shall be subjected to the bend test without any intervening loading after its galling resistance test. Specimen RY shall be subjected to the bend test following its thermal cycle test. In pursuit of testing efficiency, both bend test specimens should be subjected to the bend test sequentially rather than at separate times (e.g. both specimens can be subjected to the bend test after the thermal cycle test).

If Task 4.3.2 Bend Test is executed, then all bend test specimens shall have their secondary seals disabled as per [14.2.3](#) and their seepage ports drilled as per [14.2.4](#). Any spares substituted for those specimens shall have their secondary seals similarly disabled and seepage detection ports similarly drilled.

14.5.5 Scope of bend test

14.5.5.1 Overall scope

If Task 4.3.1 Bending Analysis has been performed, then the scope of the bend test might be influenced by the bending analysis results. Otherwise, as a default, the bend test should consist of two parts:

- Part 1: sensitivity to increasing curvature;
- Part 2: structural limit with water sealability.

In both parts of the bend test, a gradually increasing curvature shall be applied to each bend test specimen at ambient temperature. The loading sequence for the bend test is specified in [Table 25](#) in [14.5.7.2](#).

14.5.5.2 Part 1 Sensitivity to increasing curvature

In Part 1 of the bend test, each bend test specimen shall be subjected to increasingly severe curvature loading starting from a straight configuration and ending at the maximum test curvature (defined in 14.5.5.4). All bending shall be conducted in a single plane with curvature applied one way and then the other, so that each connection side experiences tensile and compressive bending stresses. Bending in both directions shall be conducted twice on each specimen. No external axial load shall be applied, either actively or passively (through end reactions).

Internal pressure shall be applied with gas.

Sealability shall be checked at each curvature increment, unless it becomes impractical due to high-rate leakage.

14.5.5.3 Part 2 - Structural limit with water sealability

In Part 2 of the bend test, each bend test specimen shall be subjected to increasingly severe curvature loading until structural failure occurs. The curvature shall be applied in discrete curvature increments, starting from the highest curvature to which the specimen was tested in the first part of the bend test, and ending when structural failure occurs. No external axial load shall be applied, either actively or passively (through end reactions).

Internal pressure shall be applied with water.

Sealability shall be checked at each curvature increment, unless it becomes impractical due to high-rate leakage.

14.5.5.4 Maximum test curvature

In Part 1 of the bend test, the maximum test curvature ρ_{MAX} shall be no less than the lowest of:

- a) 20°/30m
- b) the curvature at which the resulting bending stress in the extreme fibre of the pipe body amounts to 66 % of the nominal yield strength of the pipe body.

Condition b) above bounds the target curvature for larger pipes, for which the curvature loading at 20°/30m might cause bending stresses to approach or exceed the pipe body yield strength. Such high bending stresses are typically avoided in current thermal well designs.

14.5.5.5 Curvature increments

The curvature loading shall be applied in five curvature increments, equally spaced between the straight configuration and the maximum test curvature. Each curvature increment $\Delta\rho$ shall be targeted to be:

$$\Delta\rho = \rho_{MAX} / 5 \quad (12)$$

If any applied curvature increment differs from the target curvature increment, then the next curvature increment shall be adjusted to compensate for the difference.

14.5.6 Set-up and instrumentation

14.5.6.1 Curvature application

Curvature shall be applied by 4-point bending, or by rotating end fixtures, or by eccentric axial load acting on moment arms. Any external axial loads transferred to the test specimen shall be compensated or reacted externally to the specimen, so that there are no resultant external axial loads on the bend test specimens. Capped-end internal pressure tension does not need to be compensated.

For each bend test specimen, uniform curvature is assumed along the pipe body excluding the connection area. The curvature shall be applied so that it is uniform over at least half of the length of each casing pup belonging to that specimen and adjacent to the specimen connection(s).

14.5.6.2 Curvature measurement and control

Measurement of the specimen curvature can be achieved by:

- a) Bending strain measurement with strain gauges;
- b) Lateral deflection measurement.

At least one of the above methods shall be used. It is strongly recommended that both types of measurements (i.e. bending strains and lateral deflections) be acquired for calibration and redundancy reasons. Whereas strain gauges might fail at large pipe curvatures, curvature calculations based only on lateral deflection measurements might be degraded by stiffness contrasts at the connections.

[14.5.6.3](#) and [14.5.6.4](#) describe the above two methods and provide guidelines for their application.

14.5.6.3 Bending strains

NOTE TWCCEP's guidelines for use of strain gauges to measure bending strains are similar but not identical to those of ISO 13679.

When measuring curvature of a bend test specimen by means of strain gauges, four uniaxial strain gauge rosettes shall be placed on each casing pup belonging to that specimen at a single cross-sectional plane of that pup and at a distance of at least $3\sqrt{D*t}$ from any connection or end cap or gripping feature belonging to that specimen. The strain gauges shall be equally spaced around the circumference. The position/orientation of each gauge shall be documented.

The monitored pipe body strains shall be used to calculate the resultant specimen curvature and dogleg severity in the connection locality.

Unless necessary due to technical reasons, the strain gauges' calibration and zero position shall not be adjusted during any tests that measure the applied curvature. That is, re-zeroing is not allowed and any residual bending is part of the total applied curvature.

Size of the strain gauges might depend on connection geometry and should not be larger than 6.35 mm (0.250 in).

14.5.6.4 Lateral deflection measurements

When measuring curvature of a bend test specimen by means of lateral deflections, at least three LVDTs or linear potentiometers shall be used to measure the lateral deflection at known axial positions of that specimen. The axial positions of these instruments shall be as indicated in [Figure 20](#):

- one LVDT or linear potentiometer in the specimen centre;
- two LVDTs or linear potentiometers on the casing pups at approximately equal distances from the coupling faces or from the axial centre of an integral connection, those distances being equal to approximately half of the pup length.

The monitored lateral deflections shall be used to calculate the specimen curvature and dogleg severity in the connection area. Correlation with strain gauge measurements is recommended to enhance accuracy.

Unless necessary due to technical reasons, the calibration and zero position of the LVDTs or linear potentiometers shall not be adjusted during any tests that measure the bending moment. That is, re-zeroing is not allowed and any residual bending is part of the total applied curvature.

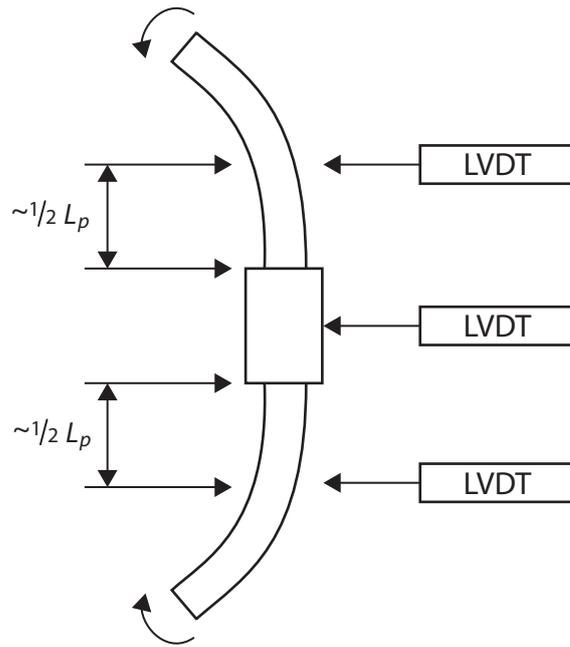


Figure 20 — LVDT placement for lateral deflection measurements

14.5.6.5 Data acquisition

A computerized data acquisition system shall be used.

As a minimum, the following data shall be acquired and recorded continuously during the test, except for test maintenance periods:

- measured bending strains and/or specimen deflections;
- calculated curvature and dogleg severity;
- axial force;
- internal pressure and fluid type;
- seepage from each connection;
- date and time.

14.5.6.6 Test frame and instrumentation checks

Integrity of the test assembly and accuracy of instrumentation measurements shall be checked, and where possible also verified, prior to test commencement.

As a minimum, the scope of the assembly checks shall include:

- instrumentation and measurements to be used for bending and curvature control;
- specimen pressure integrity;
- connectivity and clearance of seepage measurement lines;
- functioning of data acquisition system.

14.5.7 Test procedure

14.5.7.1 Specimen configuration

Each bend test specimen shall be tested individually in all parts of this test (Part 1 and Part 2). Each bend test specimen shall be tested according to the same load step sequence described below.

Each bend test shall be conducted at room temperature.

Internal gas pressure shall be applied with nitrogen. Internal liquid pressure shall be applied with water.

14.5.7.2 Load steps

[Table 25](#) contains the load steps for the bend test. Symbols used in [Table 25](#) are explained in [4.2](#).

Part 1 of the bend test verifies connection sensitivity to increasing curvature loading. Each bend test specimen is gradually bent to the maximum curvature in one direction, unloaded, and gradually bent to the maximum curvature in the opposite direction. This bi-directional sequence of loading is referred to as a bending cycle. Two bending cycles are performed. Gas seepage is measured during those two bending cycles.

Part 2 of the bend test determines the connection structural limit under curvature loading. Each bend test specimen is gradually bent in one direction until structural failure occurs. Water loss is measured in Part 2.

14.5.8 Performance assessment

The following threshold performance requirements for the bend test are provided for reference purposes in accordance with adopted principles for TWCCEP assessment criteria and result interpretation specified in [6.3.6](#) and [6.3.10](#) and in accordance with assumptions for seepage thresholds described in [6.5.3](#).

Instructing the evaluator to compare the bend test results with any connection assessment criteria is optional at the assigner's discretion. This decision shall be documented in the evaluation report. If the results of the bend test are to be compared with selected assessment criteria, interpretation of any such comparison shall be agreed between the assigner and the supplier prior to the evaluation program commencement.

For the bend test Part 1, the TWCCEP recommends that the candidate connection should be considered to have met threshold performance requirements in the bend test if all of the following conditions have been satisfied for all connections included in the bend test specimens, except any excluded Connections:

- a) No structural failure has occurred;
- b) Per-connection average gas seepage rate calculated for all holds at the maximum test curvature does not exceed 10 mL/minute.

Per-connection average seepage rate for each loading condition shall be calculated according to definitions provided in [14.2.4.3](#).

The above seepage rate threshold applies to each individual connection – i.e. not to a connection specimen unless it is an integral connection specimen ([3.12](#)).

Any seepage that exceeds 0.06 mL/minute over any 15 min interval (1 mL in 15 min) shall be identified in the evaluation report (this threshold rate is consistent with ISO 13679; the TWCCEP does not consider it to be a pass-fail criterion, but specifies it as a reportable threshold).

Average per-specimen seepage rates (i.e. for two connections in a threaded-and-coupled connection specimen) should be calculated and documented for information purposes.

No assessment criteria are specified for Part 2 of the bend test.

Table 25 — Load steps for bend test

Load step	Description	Path	Applied axial force	Average specimen curvature $\mu\epsilon$	Internal pressure MPa	Internal pressure medium	Duration	Comments
Part 1 - Sensitivity to increasing curvature								
0.1	Test initiation				0			Zero strain upon test initiation.
0.2	Pressurize		0	0	$\uparrow SSP(T_{hc})$	Gas		
0.3	Zero-load maximum pressure				$SSP(T_{hc})$		15	Zero-load hold for comparative purposes.
0.4	Reduce pressure				$\downarrow 1$			
Set bending plane and the first bend direction, and gradually bend to maximum curvature.								
i.1	Increase curvature to $\Delta\rho * n$			$\uparrow \Delta\rho * n$	1	Gas		First bending cycle: $i=1, \dots, 5$; $n=i$ Second bending cycle: $i=11, \dots, 16$; $n=i-10$ Gas pressure at 1 MPa.
i.2	Pressurize		0		$\uparrow SSP(T_{hc})$			
i.3	Maximum gas pressure hold				$SSP(T_{hc})$	15		Sealability with gas checked.
i.4	Reduce pressure				$\Delta\rho * n$			Pressure reduced to 1 MPa.
Load steps i.1 to i.4 are repeated 5 times, until maximum test curvature ρ_{MAX} is reached								
5.5	De-pressurize		0	ρ_{MAX}	$\downarrow 0$			
5.6	Unload to zero curvature			$\downarrow 0$	0			
Reverse bend direction and gradually bend to maximum curvature (the same bending plane, opposite direction)								
j.1	Increase curvature to $\Delta\rho * n$			$\uparrow \Delta\rho * n$	1	Gas		First bending cycle: $j=6, \dots, 10$; $n=j-5$ Second bending cycle: $j=16, \dots, 20$; $n=j-15$ Gas pressure at 1 MPa.
j.2	Pressurize		0		$\uparrow SSP(T_{hc})$			
j.3	Maximum gas pressure hold				$SSP(T_{hc})$	15		Sealability with gas checked.
j.4	Reduce pressure				$\Delta\rho * n$			Pressure reduced to 1 MPa.
Load steps j.1 to j.4 are repeated 5 times, until maximum test curvature ρ_{MAX} is reached								
10.5	De-pressurize		0	ρ_{MAX}	$\downarrow 0$			
10.6	Unload to zero curvature			$\downarrow 0$	0			
Load steps 1.1 to 10.6 constitute one bending cycle. Apply one more cycle identical to the first cycle (total of 2 bending cycles), incrementing the load step indices accordingly. Second cycle will contain load steps from 11.1 to 20.6								
Part 2- Structural limit with water sealability								

Table 25 (continued)

Load step	Description	Path	Applied axial force	Average specimen curvature $\mu\epsilon$	Internal pressure MPa	Internal pressure medium	Duration	Comments
21.0	Re-load to highest prior curvature			ρ_{MAX}	1	Water		
k.1	Increase curvature by $\Delta\rho$		0	$\uparrow \Delta\rho * n$	1	Water	15	k=21,22,23,...; n=k-15; up to structural failure. Water pressure at 1 MPa, for consistency with prior bending under gas pressure, unless impractical because of high leakage rate.
k.2	Re-pressurize				$\uparrow SSP(T_{hc})$			
k.3	Maximum water pressure hold			$\Delta\rho * n$	$SSP(T_{hc})$			Sealability with water checked, unless impractical because of high leakage rate.
k.4	De-pressurize				0			

Load steps k.1 to k.4 are repeated until structural failure occurs

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14.5.9 Reporting

As a minimum, reporting of Task 4.3.2 Bend Test shall contain the following items:

- Identification of connection specimens submitted for this test;
- Description of any excluded connections, as required in [14.2.5](#);
- Calculated values for the maximum test curvature and curvature increments;
- Overall description of the test set-up, including a schematic showing the test configuration, curvature application and control elements, and seepage detection points;
- Photographs of the test set-up and at least one bend test specimen installed in the test frame;
- Performed test frame and instrumentation checks;
- Ambient temperature during testing of each specimen;
- For each load step executed per [Table 25](#): date and time, load step number, measured bending strains or lateral deflections, resultant curvature and dogleg severity, and applied internal pressure;
- For each load step with a hold at stable conditions: hold duration, and average seepage rate in excess of 0.06 mL/min from each connection.

14.6 Limit-strain test

14.6.1 Task description

The limit-strain test is a full-scale test conducted on two specimens of the candidate connection. This test constitutes Task 4.4 of the TWCCEP evaluation procedure (see [Figure 6](#)). Task 4.4 contains two subtasks: Task 4.4.1 Localized Strain Seepage and Task 4.4.2 Tension Limit. Those two subtasks are structured so that both of them can be performed in a single test on a single specimen, involving the same experimental set-up and a continuous test execution procedure. The subtask numbering sequence corresponds to the order in which the two tasks would be executed in a physical test.

Execution of Task 4.4.1 Localized Strain Seepage is optional at the assigner's discretion. The decision to complete or not to complete Task 4.4.1 shall be documented in the Evaluation Report. If this task is carried out, then all TWCCEP mandatory provisions applicable to the performed task shall be satisfied. The scope of this task may be enhanced by agreement between the assigner, the supplier and the evaluator.

Execution of Task 4.4.2 Tension Limit is mandatory.

Results acquired in Task 4.4. Limit-Strain Test will include key performance measures obtained in Task 4.4.2, and might include auxiliary performance data obtained in Task 4.4.1. Regardless of the executed scope, all acquired results shall be documented in the evaluation report.

The following clauses describe the rationale, scope, set-up, data, and performance requirements for Task 4.4. Limit-Strain Test:

- [14.6.2](#) Rationale and objectives
- [14.6.3](#) Limit-strain specimens
- [14.6.4](#) Scope of limit-strain test
- [14.6.5](#) Set-up and instrumentation
- [14.6.6](#) Test procedure
- [14.6.7](#) Performance assessment

- [14.6.8](#) Reporting.

14.6.2 Rationale and objectives

Loading of casing strings in thermal wells is dominated by constrained thermal expansion, which typically leads to casing yielding and appreciable post-yield deformation of the entire casing string. Furthermore, mechanical strain induced by the constrained thermal expansion might be non-uniform along the casing length, and some (weaker) sections of the string might experience localized strain that is greater than the average strain. TWCCEP requires assessment of the candidate connection performance under increasing straining, in order to acquire information regarding how much plastic strain can be tolerated.

In field applications, strain localization might occur due to axial variations in string geometry (cross-sectional area) and material properties (yield strength, post-yield stiffness). The magnitude of strain localization is also influenced by cement support. For example:

- If the entire string is perfectly constrained from any axial movement, then no strain localization will occur.
- If every coupling is constrained from axial movement but the pipe body is free to move axially, then strain localization can occur within a single joint.
- If some couplings are constrained from axial movement but other couplings and the pipe body are free to move axially, then strain localization can occur along multiple joints.

Frictional interaction is generally expected to exist between the pipe body and cement so the “effective free length” for strain localization might be a non-integer multiple of the joint length. Due to variability in manufactured casing geometry and material properties and uncertainty in downhole conditions, strain localization can be expected to take place in field operations but the magnitude of the strain localization is uncertain.

The TWCCEP considers knowledge of the structural limit of the candidate connection to be of critical importance in the process of the connection evaluation, and therefore specifies Task 4.4.2 Tension Limit as mandatory (this approach is analogous to ISO 13679).

In addition, the assigner should carefully consider intended applications of the candidate connection when deciding whether to commission the optional portion of the limit-strain test, i.e. Task 4.4.1 Localized Strain. The TWCCEP recommends performing that task whenever one or more of the following circumstances occur:

- Substantial strain localization is expected during thermal cycles in field service;
- Significant strength contrasts are possible in the well-completion casing string;
- Likelihood of discontinuous cement support cannot be excluded;
- The candidate connection ([3.7](#)) is being qualified for a variety of applications.

The TWCCEP specifies the following objectives for the two tasks of the limit-strain test:

- Task 4.4.1 Localized Strain Seepage: assess the candidate connection’s sealability in conditions of strain localization, under strains greater than the average mechanical strain induced by constrained thermal expansion.
- Task 4.4.2 Tension Limit: assess the candidate connection’s structural integrity and tension limit under increasing axial-tensile strain.

14.6.3 Limit-strain specimens

Two connection specimens shall be subjected to the mandatory Task 4.4.2 Tension Limit:

- Specimen 1, a make-break specimen that has not been thermally cycled;
- Specimen RX, a thermally cycled specimen (see [14.4.9](#) for selection procedure for Specimen RX).

Collectively, the above two specimens are referred to as limit-strain specimens ([3.25](#)).

Both limit-strain specimens should be subjected to the optional Task 4.4.1 Localized Strain Seepage if that task is executed.

If Task 4.4.1 is performed, then all limit-strain specimens shall have their secondary seals disabled per [14.2.3](#) and their seepage ports drilled per [14.2.4](#). Any spares substituted for those specimens shall have their secondary seals similarly disabled and seepage detection ports similarly drilled.

14.6.4 Scope of limit-strain test

14.6.4.1 Overall scope

Fundamentally, the limit-strain test consists of pulling a connection specimen to failure by gradually increasing the axial tensile strain at ambient temperature. The pull-to-failure loading is performed on each limit-strain specimen, regardless of the optional task selection. Unlike the tensile loading, application of internal pressure depends on the choice of the task options. If only the mandatory Task 4.4.2 is performed, then each specimen is simply pulled to failure with no internal gas pressure and no gas sealability checks, and only small internal pressure with water is applied to help detect failure. If both Task 4.4.1 and Task 4.4.2 are performed, then internal gas pressure is applied in the initial stages of the test when gas seepage is measured; and the pressure medium is switched to water for the latter part of the test.

Regardless of the optional task selection, the limit-strain test can be completed on each specimen in a single set-up and with a continuous loading sequence.

The loading sequence for the limit-strain test is specified in [Table 26](#) and [Table 27](#) in [14.6.6.2](#). The loading consists of progressively increasing tensile strains. In order to facilitate the test execution for various optional task selections, the total test-strain range from zero to failure is divided into three strain intervals:

- a) Strain Interval 1 – tensile strain increases from zero to the average strain applied in the thermal cycle test. Within that strain range, the response of each limit-strain specimen can be compared to the performance of the specimens subjected to the thermal cycle test. If only the mandatory Task 4.4.2 is performed, then only structural integrity can be compared. If the optional Task 4.4.1 is also selected, then sealability can be compared as well. In [Table 26](#) and [Table 27](#) this strain interval is referred to as “comparative assessment range”.
- b) Strain Interval 2 – tensile strain continues to increase to a localized strain value (defined later in this clause), which is higher than the average thermal strain experienced in the thermal cycle test. If only the mandatory Task 4.4.2 is performed, then only structural integrity is assessed. If the optional Task 4.4.1 is also performed, then gas sealability is measured as well. In [Table 26](#) and [Table 27](#) the strain interval corresponding to this part of the test is referred to as “sealability at strains higher than average thermal strain”.
- c) Strain Interval 3 – tensile strain continues to increase until structural failure occurs or a decrease of axial force with increasing strain is observed. Regardless of the optional task choice, no gas pressure is applied but small water pressure is. In [Table 26](#) and [Table 27](#) this strain interval is referred to as “structural limit range”.

Based on the above strain-interval definitions, the scope of the limit-strain test can be summarized as follows:

- If only the mandatory Task 4.4.2 Tension Limit is performed, then each limit-strain specimen shall be pulled from zero strain to failure, with no gas pressure but with small water pressure in Strain Interval 1 and Strain Interval 2 and with or without water pressure in Strain Interval 3;
- If the optional Task 4.4.1 Localized Strain Seepage is performed in addition to the mandatory Task 4.4.2, then each limit-strain specimen shall be pulled from zero strain to failure, with application of gas pressure and sealability checks in Strain Interval 1 and Strain Interval 2, and with or without small water pressure in the Strain Interval 3.

Constant-strain holds in each strain interval shall be performed as defined in [14.6.6.2](#) (Table 26 and Table 27).

14.6.4.2 Localized strain value

Localized strain value is selected to approximately correspond to the magnitude of pipe strain that might be experienced downhole by the casing pipe-connection assembly when strain localization occurs.

For the purpose of TWCCEP testing, the localized strain value shall be the greater of:

- three times the free axial expansion strain that would be induced by temperature excursions between the lower-bound temperature (5°C) and the upper-bound temperature of the selected ASL;
- 1.5 % pipe strain.

14.6.4.3 Tensile strain threshold

A connection subjected to increasing tensile strain might fail by material fracture or by thread jump-out. Whatever the mode of failure, the connection's design should maintain its structural integrity under strains that are somewhat higher than the strains expected in field service, to allow for a reasonable safety factor. The TWCCEP adopts a tensile strain threshold (3.40) as the minimum tensile pipe strain below which the connection needs to maintain structural integrity.

The tensile strain threshold shall be the greater of:

- five times the free axial expansion strain that would be induced by temperature excursions between the lower-bound temperature (5°C) and the upper-bound temperature of the selected ASL;
- 3 % pipe strain.

14.6.4.4 Strain increments

Specimen loading in the limit-strain test is controlled by application of discrete strain increments, as specified in [Table 26](#) and [Table 27](#) in [14.6.6.2](#).

In Strain Interval 1, each target strain can be achieved in a single strain increment consistent with the required loading.

In Strain Interval 2 and Strain Interval 3, each target strain shall be achieved by applying strain increments $\Delta\epsilon_{LL}$ that shall be targeted to be equal to or less than 0.1 %.

If any applied strain increment differs from the target strain increment, then the next strain increment shall be adjusted to compensate for the difference.

14.6.5 Set-up and instrumentation

14.6.5.1 Test configuration

The limit-strain test can be performed in any test configuration that gradually applies tensile axial strain to the test specimen.

If Task 4.4.1 is performed, the test configuration shall apply internal pressure with gas and seepage monitoring (14.2.4). The volume of gas used to apply the internal pressure should be minimized, to reduce the energy stored in the compressed gas. This might be achieved by use of an internal mandrel.

If an internal mandrel is used to minimize the gas volume, the mandrel shall not impede diametric contraction of the test specimen, and shall not interfere with the axial load applied to the test specimen.

Figure 21 schematically illustrates a potential test set-up which accommodates the needs of both Tasks 4.4.1 and 4.4.2. Only the test specimen and its internal and end fixtures are shown. An internal mandrel with a pair of elastomeric seals is used to create a small annular space spanning the axial location of the coupling. This annular space is filled with the gas test medium and connected to an external gas pressure source through a length of small tubing. The remaining volume within the specimen is filled with liquid (water). The gas and liquid pressures should be applied simultaneously to balance the loads acting on the elastomeric seals. The end fixtures include appropriate bleed ports to ensure all gas is vented from the remaining volume when it is filled with liquid.

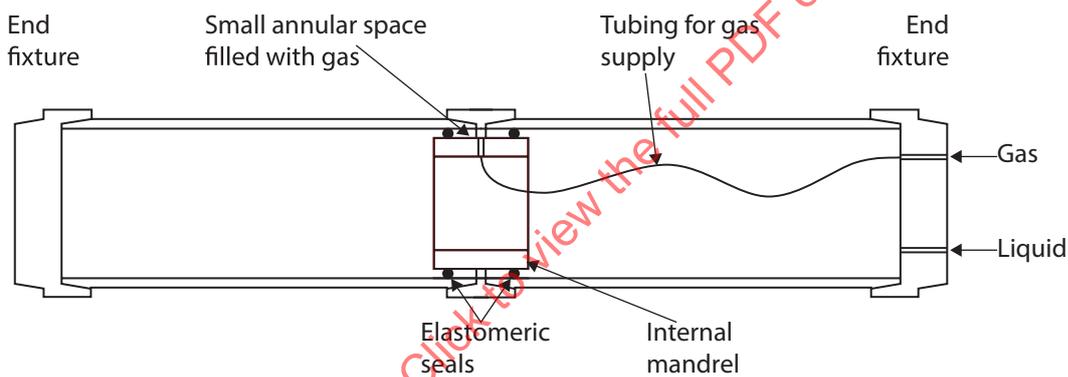


Figure 21 — Illustrative set-up for limit-strain test

The end fixtures should be designed so that they are stronger than the test specimen, in order to allow straining of the test specimen beyond its ultimate strength without a risk of failure in the end fixtures.

14.6.5.2 Internal pressure

Gas pressure in the annular space inside the coupling (or integral connection) shall be applied with an inert gas such as nitrogen. Internal liquid pressure in the remaining interior volume shall be applied with water.

For the test configuration illustrated in Figure 21, external test fixtures should be configured to ensure that equal gas and liquid pressure will be applied simultaneously to the specimen interior so that there is no net differential pressure across the elastomeric seals.

14.6.5.3 Average pipe strain

In Task 4.4, the average pipe strain in a limit-strain specimen is defined as the mean of the pipe-body axial tensile strains in each casing pup belonging to that specimen.

The test set-up shall be configured so that the average pipe strain can be determined at each load step required by the task execution procedure.

The TWCCEP recommends that redundant strain measurements be adopted for determination of the average pipe strain. Possible methods to provide redundant measurements are:

- use of LVDTs or linear potentiometers measuring elongation over a defined interval including the specimen connection(s) and converting this measurement to a “global” average strain, in a similar way as the average string strain (3.4) is determined in a thermal cycle test (see 14.4.6);
- use of strain gauges on each casing pup;
- calibration of stroke of the test frame’s actuator to average strain in the casing pups.

It is recommended that TWCCEP users consider the following cautions:

- specimen fracture shock can be destructive to displacement-measuring instruments;
- strain gauges typically have a strain measurement range up to 3 %–4 %, and additional strain measurement techniques need to be employed for strains beyond that range.

If redundant measurements of the average pipe strain obtained with various methods described above are inconsistent and their reconciliation is impossible or impractical, it is recommended that the “global” average strain be treated as the measured strain.

14.6.5.4 Data acquisition system

A computerized data acquisition system shall be used.

As a minimum, the following data shall be acquired and recorded continuously during the test, except for test maintenance periods:

- specimen elongation, if used to determine average pipe strain;
- average pipe strain, as derived from the above elongation measurement, and/or directly measured by strain gauges, or other method;
- axial stroke of the test frame’s actuator;
- axial force;
- internal pressure, when applied;
- seepage from each connection, when measured;
- date and time.

Additionally, pipe diameters midway between each connection and the end fixtures shall be measured and recorded before and after each limit-strain test.

14.6.5.5 Test frame and instrumentation checks

Integrity of the test assembly and accuracy of instrumentation measurements shall be checked, and where possible also verified, prior to test commencement.

As a minimum, the scope of the assembly checks shall include:

- instrumentation and measurements to be used for strain control;
- functioning of data acquisition system.

If the optional Task 4.4.1 Localized Strain Seepage is performed, the scope of checks shall also include:

- specimen pressure integrity;
- connectivity and clearance of seepage measurement lines.

14.6.6 Test procedure

14.6.6.1 Specimen configuration and general requirements

Each limit-strain specimen shall be tested individually.

Specimen 1 and Specimen RX shall be tested in specific load step sequences, as described in [Table 26](#) and [Table 27](#) in [14.6.6.2](#). The differences in the load sequences for those two specimens result from the fact that Specimen RX has been cycled and permanently deformed in the thermal cycle test ([3.44](#)), and is submitted for the limit-strain test with some residual axial strain. Specimen 1 has only been subjected to the galling resistance test, with no appreciable axial plastic strain imposed.

Each limit-strain test shall be conducted at ambient temperature.

Applied strain rate shall not exceed 0.1 %/minute.

If only the mandatory Task 4.4.2 Tension Limit is performed, the optional internal pressure shall be applied with water. If the optional Task 4.4.1 Localized Strain Seepage is performed in addition to the mandatory Task 4.4.2, the internal gas pressure shall be applied with nitrogen and the internal liquid pressure shall be applied with water while average pipe strain is less than, or equal to, the localized strain value (See [14.6.4.2](#)).

14.6.6.2 Load steps

[Table 26](#) contains the load steps for the limit-strain test of Specimen 1. Some initial load steps in the loading sequence of this specimen are consistent with the final load steps previously applied to Specimen RX in the thermal cycle test, so that structural and/or sealability responses of Specimen 1 and Specimen RX can be compared at equivalent loading conditions.

[Table 27](#) contains the load steps for the limit-strain test of Specimen RX. Some initial load steps in the loading sequence of this specimen are consistent with the final load steps previously applied to that specimen in the thermal cycle test, so that structural and/or sealability responses of that specimen in the two tests can be compared at equivalent loading conditions, and also compared to the responses of Specimen 1.

Path indicators (points P, Q, W, and X) indicated in [Table 26](#) and [Table 27](#) are consistent with [Figure 18](#). Symbols used in [Table 26](#) and [Table 27](#) are explained in [4.2](#).

Average post-cycle strain $ETTE_a$ shall be adopted according to [14.4.7.2](#).

In load step 0.3 and load step 0.4 in [Table 26](#), axial forces $-F_{33}$ % and $+F_{33}$ % denote, respectively, the compressive and tensile axial force that together with the capped-end pressure loading produces equivalent stress equal to 33 % of the pipe-body nominal yield strength at room temperature.

Zero-strain positions 0", 0' and 0 indicated in [Table 26](#) are consistent with zero-strain positions described in [14.4.7.2](#).

All load steps in Strain Interval 3 can be executed with or without internal water pressure.

The test may be terminated when the measured axial force decreases with strain for two consecutive strain increments (i.e. a maximum of axial load is observed), although those two consecutive axial force decreases might not be observed before a test specimen parts.

14.6.7 Performance assessment

The following threshold performance requirements (3.45) are provided for reference purposes in accordance with adopted principles for TWCCEP assessment criteria and result interpretation specified in 6.3.6 and 6.3.10.

For Task 4.4.1 Localized Strain Seepage, instructing the evaluator to compare the test results with any connection assessment criteria is optional at the assigner's discretion. This decision shall be documented in the evaluation report.

For Task 4.4.1, the TWCCEP recommends that the candidate connection should be considered to have met threshold performance requirements if all of the following conditions have been satisfied for all connections included in the limit-strain specimens, except any excluded connections:

- a) No structural failure occurs before average pipe strain equals the localized strain value;
- b) Per-connection average seepage rate is measured and reported for all holds at constant strain less than or equal to the localized strain value.

Any seepage that exceeds 0.06 mL/minute over any 15 min interval (1 mL in 15 min) shall be identified in the evaluation report (this threshold rate is consistent with ISO 13679; the TWCCEP does not consider it to be a pass-fail criterion, but specifies it as a reportable threshold).

For Task 4.4.2 Tension Limit, the candidate connection shall be considered to have met threshold performance requirements if all of the following conditions have been satisfied for all connections included in the limit-strain specimens, except any excluded connections:

- a) No structural failure occurs before the average pipe strain in each limit-strain specimen exceeds the tensile strain threshold;
- b) No decrease in axial force with increase in average pipe strain (indicating a maximum in the axial force) is observed for two consecutive strain increments before the average pipe strain exceeds the tensile strain threshold.

14.6.8 Reporting

As a minimum, reporting of Task 4.4 Limit-Strain Test shall contain the following items:

- Identification of connection specimens submitted for this test;
- Description of any excluded Connections, as required in 14.2.5;
- Calculated localized strain value and tensile strain threshold;
- Average post-cycle strain $ETTE_a$ used in testing;
- Overall description of the test set-up, including a schematic showing the test configuration, and seepage detection points (if applicable);
- Photographs of the test set-up and at least one limit-strain specimen installed in the test frame;
- Performed test frame and instrumentation checks;
- Ambient temperature during testing of each specimen;
- For each load step executed per Table 26 and Table 27: date and time, load step number, average specimen strain, axial force, and internal pressure (if applied);
- For each load step with a hold at stable conditions: hold duration, and average seepage rate in excess of 0.06 mL/min from each connection;

Table 26 — Load steps for limit-strain test of Specimen 1

Load step	Description (Note 1)	Path	Axial force	Average pipe strain $\mu\epsilon$	Internal pressure (Note 1) MPa	Internal pressure medium (Note 1)	Duration Min.	Comments
Strain interval 1 - Comparative assessment range								
0.1	Test initiation		0	0"	0			Zero strain upon test initiation
0.2	Zero-load hold at maximum pressure		0	Resultant	$SSP(T_{hc})$		15	Compare with Specimen RX in limit-strain test load step 0.2 and in thermal cycle test load step F.3
0.3	Elastic compression		$-F_{33\%}$				15	Approximate comparison with ISO 13679
0.4	Elastic tension		$+F_{33\%}$				15	
	De-pressurize and release load							
0.5	Re-zero total strain	P	0	0'	0	Gas		Assume current strain as zero strain after elastic loading
0.6	Compress by <i>LTTs</i>	P-Q			0			Strain-compensation <i>LTTs</i> is applied in compression
0.7	Maximum pressure						15	Compare with Specimen RX in thermal cycle test load step 0.7
	Depressurize		Resultant		$SSP(T_{hc})$			Assume current strain as zero strain after <i>LTTs</i> compensation
0.8	Re-zero total strain	Q			0			For subsequent load steps, the <i>LTTs</i> -compensated strain is assumed as zero
0.9	Lock strain reference							
1.1	Tension to residual post-cycle strain plus <i>LTTs</i>			$0 \uparrow (ETTE_a + LTTs)$	0			
1.2	Pressurize		Resultant	$ETTE_a + LTTs$	$0 \uparrow SSP(T_{hc})$	Gas	15	Compare with Specimen RX in limit-strain test load step 0.6
1.3	Maximum gas pressure hold				$SSP(T_{hc})$			
1.4	De-pressurize				$\downarrow 1$			
Strain interval 2 - Scalability at strains higher than average thermal strain								
<p>Note 1 Use pressure medium and magnitudes as shown for combined execution of Task 4.4.1 and Task 4.4.2. Use water pressure at 0.1 MPa for all non-zero pressure holds when Task 4.4.2 is performed and Task 4.4.1 is not performed.</p> <p>Note 2 Load steps in strain interval 3 can be executed with or without internal water pressure.</p>								

Table 26 (continued)

Load step	Description (Note 1)	Path	Axial force	Average pipe strain $\mu\epsilon$	Internal pressure (Note 1) MPa	Internal pressure medium (Note 1)	Duration Min.	Comments	
i.1	Increase strain to $(ETTE_a + LTTS + \Delta\epsilon_{LL}^*i)$		Resultant	$\uparrow(ETTE_a + LTTS + \Delta\epsilon_{LL}^*i)$	1	Gas	15	i=1,2,3,... until limit condition is reached. Each strain increment = $\Delta\epsilon_{LL}$.	
i.2	Re-pressurize				$\uparrow SSP(T_{hc})$				
i.3	Maximum gas pressure hold				$SSP(T_{hc})$				
i.4	De-pressurize				$\downarrow 1$				Sealability check
Load steps i.1 to i.4 are repeated until localized strain value is reached									
Strain interval 3 - Structural limit range									
j.1	De-pressurize and change pressure medium		Resultant	$ETTE_a + LTTS + \Delta\epsilon_{LL}^*i$	0.1 or none (Note 2)	Water	1	j=i+1, where i corresponds to last iteration in strain interval 2. Reduce gas pressure to zero and change pressure medium to water. Optionally, re-pressurize per Note 2.	
j.2	Increase strain to $(ETTE_a + LTTS + \Delta\epsilon_{LL}^*j)$				$\uparrow(ETTE_a + LTTS + \Delta\epsilon_{LL}^*j)$				j=i+1, i+2, i+3, ... until limit condition is reached. Each strain increment = $\Delta\epsilon_{LL}$.
j.3	Hold				$ETTE_a + LTTS + \Delta\epsilon_{LL}^*j$				Axial force check
Load steps j.2 to j.3 are repeated until structural failure occurs or a decrease of axial force with increasing strain is observed for two consecutive load steps									
Note 1 Use pressure medium and magnitudes as shown for combined execution of Task 4.4.1 and Task 4.4.2. Use water pressure at 0.1 MPa for all non-zero pressure holds when Task 4.4.2 is performed and Task 4.4.1 is not performed.									
Note 2 Load steps in strain interval 3 can be executed with or without internal water pressure.									

Table 27 — Load steps for limit-strain test of Specimen RX

Load step	Description (Note 1)	Path	Axial force	Average pipe strain $\mu\epsilon$	Internal pressure (Note 1) MPa	Internal pressure medium (Note 1)	Duration Min.	Comments
Strain interval 1 - Comparative assessment range								
0.1	Test initiation				0			Reset strain to be equal to residual strain after thermal cycle test
0.2	Zero-load maximum pressure	X	0	$-ETTE_a$	$SSP(T_{hc})$		15	Compare with Specimen RX in thermal cycle test load step F.3, and with Specimen 1 in strain-limit test load step 0.2
	De-pressurize				$\downarrow 0$			
0.3	Tension to thermal-cycle zero strain	X-Q		$\uparrow 0$	0			Zero strain approximately the same as at the end of the thermal cycle test
0.4	Maximum gas pressure hold	Q		0		Gas	15	
0.5	Tension to L_{TTS}	Q-P	Resultant	$0 \uparrow L_{TTS}$	$SSP(T_{hc})$			Small amount of strain is added at full gas pressure because the specimen was already subjected to that pressure
0.6	Maximum gas pressure hold	P		L_{TTS}			15	Compare with Specimen RX in low cycle temperature holds in thermal cycle test, and with Specimen 1 in limit-strain test load step 1.3
	De-pressurize				$\downarrow 1$			
Strain interval 2 - Sealability at strains higher than average thermal strain								
i.1	Increase strain to $(L_{TTS} + \Delta\epsilon_{LL}^{*i})$			$\uparrow (L_{TTS} + \Delta\epsilon_{LL}^{*i})$	1			$i=1,2,3,\dots$ until limit condition is reached. Each strain increment = $\Delta\epsilon_{LL}$.
i.2	Re-pressurize				$\uparrow SSP(T_{hc})$			
i.3	Maximum gas pressure hold		Resultant		$SSP(T_{hc})$	Gas	15	Sealability check
i.4	De-pressurize			$(L_{TTS} + \Delta\epsilon_{LL}^{*i})$	$\downarrow 1$			
Load steps i.1 to i.4 are repeated until localized strain value is reached								
Strain interval 3 - Structural limit range								
Note 1 Use pressure medium and magnitudes as shown for combined execution of Task 4.4.1 and Task 4.4.2. Use water pressure at 0.1 MPa for all non-zero pressure holds when Task 4.4.2 is performed and Task 4.4.1 is not performed.								
Note 2 Load steps in strain interval 3 can be executed with or without internal water pressure.								