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Review of Research Status and Development Trends of Subsurface Safety Valve Technology

Guohai Yuan¹, Yexin Fang¹, Lingyu Mu¹, Kun Ning¹, Rutao Ma¹, Guotao Yuan²

1. CNPC Engineering Technology R&D Company Limited, Beijing, China;

2. Cementing Branch, Daqing Drilling Technology Company Limited, Daqing, China;

Abstract: Subsurface safety valves (SSSVs) are critical components of wellbore integrity systems and serve as essential downhole safety barriers for oil and gas production. By rapidly shutting off the production conduit under abnormal conditions, such as wellhead failure, blowouts, or uncontrolled formation fluid flow, SSSVs effectively prevent major safety accidents and environmental hazards. With the continuous development of deepwater oil and gas fields, high-temperature thermal recovery wells, sour gas reservoirs, shale gas, and underground gas storage, conventional SSSVs face increasing challenges related to high temperature, high pressure, corrosion, sealing reliability, and long-term operational stability. In recent years, extensive studies have been conducted on the structural optimization, control mechanisms, sealing technologies, reliability assessment, and adaptability of SSSVs under complex operating conditions. This paper systematically reviews the classification, structural characteristics, and working principles of SSSVs, and summarizes the recent advances in hydraulic-controlled SSSVs, self-balancing SSSVs, high-temperature and deepwater SSSVs, low-throttling SSSVs, and reliability evaluation technologies. The key technical challenges, including sealing failure, control system reliability, material degradation, and insufficient adaptability to extreme environments, are discussed. Furthermore, future development trends of SSSVs are proposed, including intelligent monitoring and control, high-performance materials, digital reliability management, and life-cycle safety assessment. This review provides valuable references for the design optimization and technological development of next-generation high-performance subsurface safety valve systems.

Keywords: Subsurface safety valve; Wellbore integrity; Hydraulic control; Self-balancing mechanism; Sealing technology; Reliability assessment

1. Introduction

With the continuous development of global oil and gas resources, exploration and production activities are increasingly expanding toward deepwater fields, high-temperature reservoirs, high-pressure gas reservoirs, shale gas reservoirs, and underground gas storage systems. These complex geological and operational environments impose increasingly stringent requirements on wellbore integrity and production safety. As one of the most important safety barriers in oil and gas wells, the subsurface safety valve (SSSV) plays a critical role in preventing uncontrolled hydrocarbon flow, mitigating blowout risks, and ensuring safe production operations. When abnormal conditions such as wellhead damage, fire, pipeline rupture, or uncontrolled formation fluid influx occur, the SSSV can rapidly shut off the production conduit and isolate the reservoir from the surface facilities, thereby reducing the probability of catastrophic accidents [1–3].

The development of subsurface safety valves has experienced several stages, including rod-type valves, ball valves, and flapper-type valves. Early valve structures suffered from limitations such as restricted internal flow passages and poor recoverability after control system failure. With continuous technological advancement, surface-controlled subsurface safety valves (SCSSVs), especially tubing-retrievable safety valves, have gradually become the dominant technology in offshore oil and gas production due to their high reliability, convenient operation, and compatibility with long-term well service conditions [4,5]. A typical hydraulic-controlled SCSSV mainly consists of a hydraulic control line, hydraulic cylinder, piston assembly, spring mechanism, mandrel, flapper valve, and valve seat. The valve is opened by applying hydraulic pressure from the surface to move the piston and compress the spring, while the loss of hydraulic pressure triggers automatic closure through spring restoration and valve flap rotation [6].

Although conventional hydraulic-controlled SSSVs have been widely applied, increasingly complex production conditions have exposed several technical challenges. In deepwater and high-temperature oilfields, SSSVs must simultaneously withstand high pressure, elevated temperature, corrosive fluids, and long-term mechanical loading. For example, offshore thermal recovery operations require SSSVs with enhanced temperature resistance and deeper installation capability. To address these challenges, researchers have developed high-temperature deepwater SSSVs using optimized sealing structures, high-performance materials, and improved spring designs. Experimental studies demonstrated that newly developed high-temperature SSSVs could operate under temperatures up to 350 °C and installation depths exceeding 1300 m, providing technical support for offshore thermal recovery applications [7].

Sealing reliability is one of the most critical factors affecting the performance and service life of SSSVs. During long-term operation, valve sealing surfaces are exposed to high-pressure differentials, temperature fluctuations, corrosive media, and solid particle erosion, which may result in leakage or failure of valve closure. Therefore, researchers have focused on improving valve plate structures, optimizing metal-to-metal sealing mechanisms, and developing corrosion-resistant materials. Studies on offshore SSSVs have shown that

reducing leakage points and adopting all-metal sealing structures can significantly improve high-temperature and high-pressure performance [7,8].

In addition to structural optimization, self-balancing technology has become an important research direction for improving SSSV operating reliability. Traditional SSSVs require high hydraulic pressure to overcome the pressure difference across the valve plate during opening, especially in deep wells. Self-balancing SSSVs introduce balancing mechanisms to reduce the pressure differential between the upper and lower sides of the valve plate, thereby lowering opening pressure requirements and improving operational stability. Dynamic response analyses of self-balancing SSSVs have further investigated the relationship between balancing valve geometry, response time, and valve-opening performance, providing theoretical guidance for structural optimization [9].

The reliability evaluation and failure prediction of SSSV systems have also received increasing attention. Since SSSVs are essential components of wellbore barrier systems, their failure may directly threaten production safety and environmental protection. Recent studies have applied fault tree analysis, Bayesian networks, and Markov models to evaluate SSSV reliability and identify major risk factors. For shale gas wells, Bayesian network-based failure probability assessment methods have been developed to quantify SSSV risks and establish corresponding management strategies [10]. Reliability analyses of surface-controlled SSSV systems have also demonstrated the importance of optimizing maintenance cycles, redundancy design, and system reliability management [11].

With the development of unconventional resources and special underground storage systems, SSSVs must adapt to increasingly diverse application scenarios. In high-sulfur gas fields, such as the Puguang gas field, replacement operations of downhole safety valves face significant challenges due to high pressure, high temperature, and hydrogen sulfide risks. Technologies including chemical temporary plugging, high-pressure tubing plugging tools, and low-density kill fluids have been developed to ensure safe replacement operations while minimizing reservoir damage [12]. For salt cavern gas storage systems, low-throttling SSSVs have been developed to reduce flow restriction and erosion during gas injection and brine discharge processes. The application of optimized flow channels and corrosion-resistant materials has improved hydraulic performance and operational reliability [13].

Furthermore, unexpected closure of SSSVs may interrupt production and prevent wireline, cable, or coiled tubing operations. To solve this problem, full-bore forced-opening tools have been developed to permanently maintain the valve in an open position while preserving the original flow diameter, providing an effective emergency treatment method for failed SSSVs [14]. Meanwhile, advanced control technologies, including pressure pulse control and electrically driven mechanisms, have been investigated to reduce dependence on hydraulic control lines and improve response speed and reliability [15].

Despite significant progress, current SSSV technologies still face challenges associated with extreme environmental adaptability, intelligent monitoring, lifecycle reliability management, and failure prediction. Future development is expected to focus on high-performance materials, intelligent sensing and control systems, digital reliability evaluation, and life-cycle management technologies. Therefore, a comprehensive review of existing

SSSV technologies, research progress, and future development trends is essential for promoting the design and application of next-generation high-performance subsurface safety valve systems.

2. Classification and Working Principles of Subsurface Safety Valves

2.1 Classification of Subsurface Safety Valves

Subsurface safety valves (SSSVs) can be classified according to their control mechanisms, installation methods, and recovery methods. According to the control mode, SSSVs are mainly divided into surface-controlled subsurface safety valves (SCSSVs) and subsurface-controlled safety valves. According to the retrieval method, SCSSVs can be further categorized into tubing-retrievable subsurface safety valves (TRSVs) and wireline-retrievable subsurface safety valves (WRSSVs) [16].

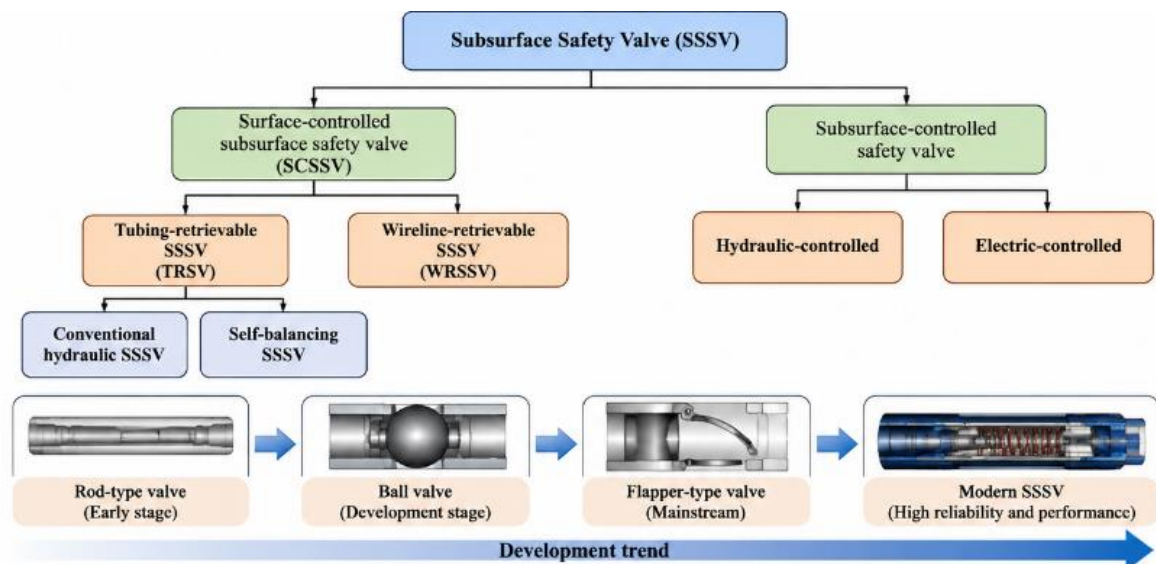


Figure 1. Classification and development route of subsurface safety valves

Among these types, SCSSVs are currently the most widely used systems in offshore oil and gas production because of their high reliability, rapid response capability, and suitability for long-term completion operations. In offshore production wells, tubing-retrievable hydraulic-controlled SSSVs are commonly installed as permanent components of the completion string and remain in service throughout the production life of the well [17].

The development of SSSVs has undergone several stages. Early designs mainly included rod-type and ball-type safety valves. However, these structures showed limitations in flow capacity, sealing performance, and maintenance convenience. With the advancement of completion technology, flapper-type SSSVs gradually became the mainstream design because they provide better sealing performance, larger flow passages, and more reliable emergency shutoff capability [18].

A typical modern SSSV consists of a hydraulic control system, valve body assembly, actuator mechanism, spring return system, and sealing components. The hydraulic control system provides the driving force for valve opening, while the spring mechanism ensures

automatic closure when hydraulic pressure is lost. This fail-safe design enables the valve to automatically isolate the reservoir under emergency conditions.

Table 1. Comparison of different types of subsurface safety valves

Type	Control method	Main structure	Advantages	Limitations	Typical application
Hydraulic-controlled SSSV	Surface hydraulic pressure	Hydraulic cylinder, piston, spring, mandrel, flapper valve	Mature technology, high reliability, rapid response	Dependent on hydraulic control line integrity	Offshore oil and gas wells
Tubing-retrievable SSSV (TRSV)	Hydraulic control integrated with tubing string	Integrate d valve body and tubing completion string	High mechanical strength, large flow passage, suitable for long-term production	Difficult replacement during intervention	Offshore production wells
Wireline-retrievable SSSV (WRSSV)	Wireline operation	Retrievable valve assembly	Easy maintenance and replacement	Lower strength compared with TRSV	Workover and intervention operations
Self-balancing SSSV	Hydraulic control with pressure balancing mechanism	Balance valve, piston, mandrel system	Lower opening pressure, improved operation reliability	More complex structure	Deep and high-pressure wells
Intelligent/electrical SSSV	Electrical or hybrid control	Sensors, electric actuator, control module	Real-time monitoring and intelligent control capability	Technology maturity and field application limitations	Future intelligent wells

2.2 Hydraulic-Controlled Subsurface Safety Valves

Hydraulic-controlled SSSVs are the most commonly applied type in offshore oil and gas production. Their operation depends on hydraulic pressure transmitted through a control line from the surface control system to the downhole valve assembly.

The main components include:

1. Hydraulic control line;
2. Hydraulic cylinder;

3. Piston assembly;
4. Spring mechanism;
5. Mandrel;
6. Flapper valve;
7. Valve seat.

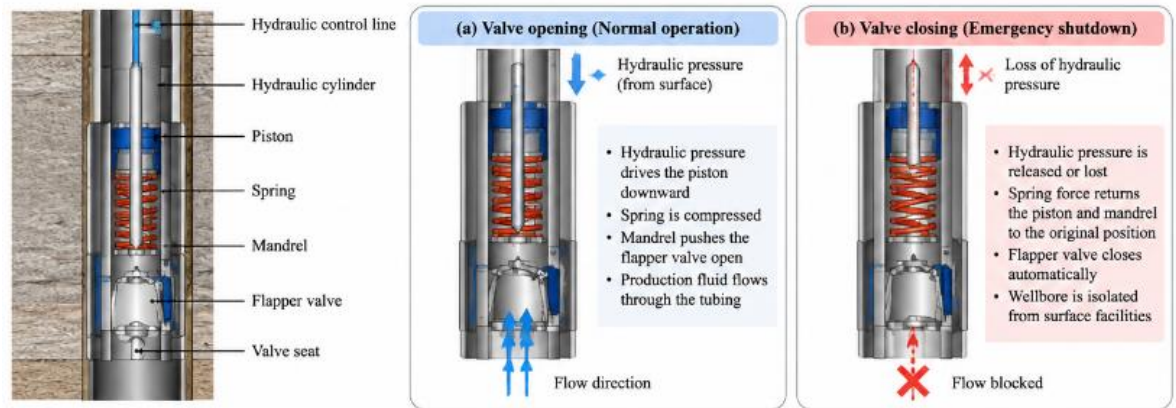


Figure 2. Working principle of a typical hydraulic-controlled subsurface safety valve.

The hydraulic control line transfers pressure from the surface hydraulic power unit to the valve actuator. When hydraulic pressure is applied, the piston moves downward and compresses the spring. The mandrel then pushes the flapper valve open, creating a continuous production flow channel. When hydraulic pressure is released, the spring force returns the piston and mandrel to their original positions, allowing the flapper valve to close automatically [19].

The hydraulic-controlled SSSV has several advantages:

- Fast response during emergency shutdown;
- High sealing reliability;
- Compatibility with various completion systems;
- Ability to maintain normally open production conditions.

However, its performance is strongly influenced by hydraulic system reliability. Leakage, corrosion, or blockage of the control line may lead to failure of valve operation, especially in deep and high-temperature wells.

2.3 Tubing-Retrievable and Wireline-Retrievable Safety Valves

(1). Tubing-Retrievable Subsurface Safety Valve (TRSV)

The tubing-retrievable SSSV is installed as an integrated component of the production tubing string. During completion operations, the valve is lowered together with the tubing and remains underground during the production period.

The advantages of TRSV include:

- High mechanical strength;
- Large internal flow diameter;
- Better resistance to production fluid erosion;
- Improved long-term reliability.

The Halliburton NE-type tubing-retrievable SSSV is a typical example. Its internal piston system works together with compression springs and valve locking mechanisms. The valve requires hydraulic pressure compensation before opening, ensuring safe operation under high-pressure conditions [20].

(2). Wireline-Retrieval Subsurface Safety Valve (WRSSV)

Unlike TRSVs, wireline-retrievable SSSVs can be removed and replaced through wireline operations without pulling the entire tubing string.

Their main advantages include:

- Easier maintenance;
- Lower intervention cost;
- Shorter replacement time.

However, compared with TRSVs, wireline-retrievable valves generally have limitations in mechanical strength and internal flow diameter, which restrict their application in some high-pressure offshore wells.

2.4 Self-Balancing Subsurface Safety Valves

Traditional hydraulic-controlled SSSVs require high hydraulic pressure to overcome the pressure difference acting on the flapper valve during opening. This problem becomes more significant in deep wells where hydrostatic pressure and formation pressure increase the opening resistance.

To overcome this limitation, self-balancing SSSVs have been developed. The self-balancing mechanism reduces the pressure difference across the valve plate by allowing pressure equalization between the upper and lower sections of the valve.

The working process includes:

1. Hydraulic pressure drives the piston;
2. The balancing mechanism reduces pressure differential;
3. The mandrel moves downward;
4. The flapper valve opens under reduced resistance.

Research on dynamic response characteristics showed that the matching relationship between balancing time and mandrel movement time directly affects valve-opening reliability. Optimization of balancing valve size and installation position can improve operational stability [21].

2.5 Working Principle of Fail-Safe Operation

One of the most important characteristics of SSSVs is the fail-safe closed function.

During normal production:

- Hydraulic pressure is continuously supplied;
- Valve remains open;
- Production fluid flows through the tubing.

During abnormal conditions:

- Surface control pressure is lost;

- Hydraulic actuator pressure decreases;
- Spring force returns internal components;
- Flapper valve closes automatically.

This fail-safe mechanism ensures that the well can be isolated without external power supply, which is essential for offshore platforms and high-risk production environments.

3 Key Technologies and Research Progress of Subsurface Safety Valves

3.1 Sealing Technology and Structural Optimization

Sealing performance is one of the most important factors determining the reliability and service life of subsurface safety valves. During long-term operation, the sealing components are subjected to high pressure differentials, temperature fluctuations, corrosive fluids, and erosion caused by solid particles, which may lead to leakage or failure of valve closure.

To improve sealing reliability, researchers have focused on optimizing valve plate structures, improving valve-seat contact performance, and applying high-performance materials. Studies on offshore SSSVs have shown that reducing sealing interfaces and adopting metal-to-metal sealing structures can effectively improve pressure resistance and long-term stability under harsh downhole conditions [22].

For high-temperature and high-pressure applications, new materials such as nickel-based alloys and corrosion-resistant steels have been introduced. These materials improve resistance against thermal degradation and corrosive environments, providing better reliability for deep and sour gas wells [23].

3.2 High-Temperature, High-Pressure and Special Environment Applications

With the development of deepwater oilfields, sour gas reservoirs, shale gas, and underground gas storage, SSSVs are required to operate under increasingly severe conditions.

For high-temperature offshore wells, researchers have developed high-temperature SSSVs by optimizing spring systems, sealing structures, and material selection. These valves have demonstrated improved performance under elevated temperatures and deep installation conditions [24].

In high-sulfur gas fields, such as the Puguang gas field, replacement of failed SSSVs presents significant safety challenges due to high pressure, high temperature, and hydrogen sulfide risks. Temporary plugging technologies, high-pressure tubing plugging tools, and low-density well-killing fluids have been developed to ensure safe SSSV replacement operations [25].

For underground gas storage applications, low-throttling SSSVs have been developed to reduce flow restriction and erosion. The optimization of internal flow channels and sealing structures can effectively reduce throttling losses and improve operational efficiency [26].

3.3 Reliability Evaluation and Failure Analysis

As a key component of the wellbore barrier system, SSSV reliability directly affects production safety. Therefore, failure mechanism analysis and reliability assessment have become important research topics.

Current reliability evaluation methods mainly include fault tree analysis (FTA), Bayesian networks, and reliability models. For shale gas wells, researchers established Bayesian network-based failure probability models to identify major risk factors and evaluate SSSV operational reliability [27].

The main failure modes of SSSVs include:

- Hydraulic control line leakage;
- Valve sealing failure;
- Inability to open or close;
- Corrosion damage;
- Mechanical component failure.

Reliability analysis provides theoretical support for maintenance optimization, risk prevention, and lifecycle management of SSSV systems.

3.4 Intelligent Control and New Intervention Technologies

Traditional SSSVs mainly rely on hydraulic control systems. Although mature and reliable, hydraulic systems may experience leakage, response delay, and maintenance difficulties during long-term operation.

To overcome these limitations, new control technologies have been investigated, including pressure pulse control, electric-driven mechanisms, and intelligent monitoring systems. These technologies aim to reduce dependence on hydraulic control lines and improve real-time monitoring capability [28].

In addition, special intervention technologies have been developed for SSSV failures. For example, full-bore forced-opening tools can permanently maintain the valve in an open position after accidental closure, allowing wireline, cable, and coiled tubing operations to continue [29].

Table 2 summarizes the major research directions and technological objectives of SSSVs.

Research direction	Main problems	Key technologies	Expected improvements
Sealing optimization	Leakage and sealing degradation	Metal sealing, improved valve plate design, advanced materials	Higher pressure resistance and longer service life
High-temperature and high-pressure SSSV	Extreme operating conditions	High-temperature alloys, optimized springs, improved sealing structures	Better environmental adaptability
Self-balancing technology	High opening pressure	Pressure balancing mechanism	Reduced hydraulic requirements and improved reliability
Reliability evaluation	Unknown failure probability	FTA, Bayesian network, reliability models	Risk prediction and maintenance optimization

Intelligent control	Limited monitoring capability	Electric control, sensors, digital monitoring	Real-time diagnosis and intelligent operation
Failure intervention	Valve stuck or accidental closure	Full-bore forced-opening tools	Reduced production interruption

4 Challenges and Future Development Trends of Subsurface Safety Valves

4.1 Challenges in Current Subsurface Safety Valve Technologies

Although significant progress has been achieved in the design and application of subsurface safety valves, several challenges remain due to increasingly complex oil and gas production environments.

(1) Reliability under extreme operating conditions

Deepwater wells, high-temperature reservoirs, sour gas fields, and unconventional reservoirs expose SSSVs to severe operating conditions, including high pressure, elevated temperature, corrosive fluids, and long-term mechanical loading. Under these environments, degradation of sealing components, corrosion of metallic parts, and fatigue failure of springs may reduce valve reliability and increase the risk of malfunction [30].

In particular, high-pressure and high-temperature wells require SSSVs with improved material strength, sealing capability, and structural stability. Current designs still face limitations in achieving long-term reliable operation under combined extreme conditions.

(2) Limitations of hydraulic control systems

Most currently applied SSSVs rely on hydraulic control lines for opening and closing operations. Although hydraulic systems provide reliable control and rapid response, their performance depends strongly on the integrity of the control line.

During long-term operation, potential problems include:

- Hydraulic fluid leakage;
- Control line corrosion;
- Pressure transmission delay;
- Difficult maintenance in deep wells.

These limitations become more significant as well depth increases. Therefore, improving control system reliability remains an important research direction for future SSSV development [31].

(3) Insufficient intelligent monitoring capability

Traditional SSSVs mainly perform passive safety protection functions, meaning that they close automatically after abnormal conditions occur. However, they generally lack real-time monitoring capabilities for internal pressure, valve position, sealing status, and mechanical degradation.

With the increasing demand for intelligent oil and gas production, future SSSVs require integrated sensing and diagnostic technologies to achieve:

- Real-time condition monitoring;

- Early failure warning;
- Predictive maintenance;
- Remote operation management.

4.2 Future Development Trends

(1) Intelligent and digitalized subsurface safety valves

The integration of sensors, advanced control systems, and digital technologies is expected to transform conventional SSSVs into intelligent safety control equipment.

Future intelligent SSSVs may incorporate:

- Downhole pressure and temperature sensors;
- Wireless communication technologies;
- Digital twin models;
- Artificial intelligence-based failure prediction.

By combining real-time monitoring data with reliability models, operators can predict potential failures before they occur and optimize maintenance strategies.

(2) Advanced materials and sealing technologies

Material innovation remains a key direction for improving SSSV performance.

Future research will focus on:

- High-temperature nickel-based alloys;
- Corrosion-resistant materials for sour gas environments;
- Wear-resistant valve plate materials;
- Advanced metal-to-metal sealing structures.

These developments will improve resistance to temperature, pressure, corrosion, and erosion, extending SSSV service life under harsh conditions [32].

(3) Development of electric and hybrid control systems

Compared with conventional hydraulic control systems, electric and hybrid control technologies provide advantages in:

- Faster response;
- Reduced dependence on hydraulic lines;
- Improved monitoring capability;
- Easier integration with intelligent completion systems.

Although electric SSSV technology is still under development, it represents an important direction for future intelligent wells and automated production systems.

(4) Reliability-based lifecycle management

Future SSSV management will gradually shift from traditional periodic maintenance toward lifecycle reliability management.

By combining:

- Failure probability models;
- Field operation data;
- Artificial intelligence algorithms;
- Digital simulation methods,

the reliability status of SSSVs can be continuously evaluated throughout their service life.

This approach can reduce unexpected failures, optimize maintenance schedules, and improve the overall safety level of oil and gas production systems [33].

The major challenges and future development trends of SSSVs are summarized in Table 3.

Table 3. Challenges and future development trends of subsurface safety valves

Current challenges	Technical causes	Future development directions
Sealing degradation	High pressure, temperature fluctuation, corrosion, erosion	Advanced sealing structures and high-performance materials
Hydraulic system failure	Control line leakage and pressure transmission problems	Electric/hybrid control systems
Lack of condition monitoring	Passive safety function only	Intelligent sensing and real-time diagnosis
Difficult maintenance in deep wells	Complex downhole environment	Predictive maintenance and lifecycle management
Limited extreme environment adaptability	Material and structural limitations	New alloys, coatings, and optimized designs

5 Conclusions

Subsurface safety valves (SSSVs) are essential safety barriers in modern oil and gas production systems and play a critical role in maintaining wellbore integrity and preventing uncontrolled hydrocarbon release. With the continuous development of deepwater oilfields, high-temperature reservoirs, sour gas fields, shale gas, and underground gas storage systems, higher requirements have been imposed on the reliability, adaptability, and intelligence of SSSV technologies.

This review summarizes the classification, structural characteristics, working principles, key technologies, and future development trends of SSSVs. Conventional hydraulic-controlled subsurface safety valves remain the dominant technology due to their mature design, reliable fail-safe operation, and extensive field application experience. However, challenges associated with sealing degradation, hydraulic control system reliability, and long-term operation under extreme environments continue to limit their performance.

Recent research has focused on improving SSSV performance through structural optimization, self-balancing mechanisms, advanced sealing technologies, high-performance materials, and reliability assessment methods. Self-balancing SSSVs can reduce opening pressure requirements and improve operational stability, while high-temperature and low-throttling SSSVs provide better adaptability for harsh environments such as thermal recovery wells and underground gas storage systems. In addition, reliability analysis methods based on fault tree analysis, Bayesian networks, and reliability models provide effective approaches for failure prediction and lifecycle management.

Future SSSV development will increasingly focus on intelligent and digital technologies. The integration of sensors, advanced control systems, artificial intelligence, and digital twin technologies is expected to enable real-time condition monitoring, early fault diagnosis, and predictive maintenance. Meanwhile, improvements in high-performance materials and sealing technologies will further enhance the ability of SSSVs to operate under high-pressure, high-temperature, and highly corrosive conditions.

Overall, the development of next-generation SSSVs requires the integration of mechanical design, materials science, control engineering, and intelligent monitoring technologies. By improving reliability, adaptability, and intelligence, future SSSV systems will provide stronger technical support for the safe and efficient development of complex oil and gas resources.

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