



## Optimizing Unconventional Hydrocarbon Recovery Through Advanced Multi-Cluster and Zipper Fracturing Systems

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### Abstract

#### Abstract

In the foreseeable future, unconventional reservoir technologies will continue to be key solutions for providing hydrocarbons during the global energy transition. It is a state-of-the-art review that provides an extensive compilation of multi-cluster and zipper fracturing technology that combines geomechanical basics and selection of completion hardware with operational aspects and real-time diagnostics into an integrated analytical package. The review reveals an important research gap concerning the lack of unified stage isolation hardware selection, dynamic optimization of cluster spacing, stress shadowing mitigation and interference between wells within a single decision-support architecture. Field evidence shows that up to 40% of perforation volume in conventional plug-and-perf (PnP) operations does not contribute to production and 15–25% of estimated ultimate recovery (EUR) in parent wells can be lost due to frac hits during zipper operations (PnP and Daneshy, 2019, 2020). But ball activated (BA) systems are becoming a scalable solution, reducing completion time by 40% or more while improving perforation efficiency through better flow distribution. A detailed NPV analysis, used to evaluate the benefits of the advanced completion systems, shows that the EUR gain is between 15% and 30% and the life-cycle cost per barrel (LCC/barrel) is reduced by up to 22%. The synthesis is based on the United Nations Sustainable Development Goals (SDGs) 7 (Affordable and Clean Energy), 8, 9, 12 (Responsible Consumption), and 13 and provides a blueprint for responsible and efficient development.

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### Introduction

The shale revolution has provided a fundamental shift in how the energy markets operate and uncovered tens of millions of barrels of hydrocarbons from nano-darcy low-permeability formations that were once considered to be uneconomic. The combination of horizontal drilling and hydraulic fracturing has been the key enabling innovation that has boosted North American unconventional production to an unprecedented level; according to the International Energy Agency (IEA, 2023), the number of wells that are completed horizontally after hydraulic fracturing has increased to more than 90% of new production in North America. This has shifted the strategic goal of these operations from an engineering dream to an “operating imperative” since it seeks to maximize the Stimulated Reservoir Volume (SRV) with minimum capital expenditure (CAPEX) and environmental footprint.

Even though these methods found much use in development, the early years of unconventional showed another paradox that making fractures alone was not

enough to achieve economic production. These fractures proved to be the real key to sustained well performance, in terms of both their quality and spatial distribution and extent of connectedness. This alerting event spurred an innovation in the mechanics of completions — multi-cluster infringing completions (MCI) which seek to maximise the number of completions completed in a wellbore to an independent number of fracture initiation points per stage, and also in the spacing of wells in a pad development zipper fracturing which finds its origins in utilising the constructive interactions between the geomechanics of co-developed wellbores to enhance reservoir stimulation. Stakes are very high economically. A 10% increase in EUR even in the Permian Basin where well spend often exceeds \$8 Million means hundreds of millions of dollars added to the overall value of the field. There is however a continuing need for knowledge that is directly addressed by this review, although the separate elements of the system, the isolation hardware, the geomechanical modelling tool and the fibre-optic real-time diagnostic system have become very mature, there is

a lack of an integrated approach that optimises all the elements of the system within a comprehensive decision setting in the peer-reviewed literature. Inconsistent field effectiveness is observed with maximized coverage from perforation clusters showing only 5–40% fluid flow on the receiving well during the treatment as seen on by distributed acoustic sensing (DAS) studies (Ugueto *et al.*, 2019) and up to 15–25% of zipper operations showing negative interference between the wells sometimes called “frac hits” (Daneshy, 2020; Ajani & Kelkar, 2012). These inefficiencies are not just technical problems, but also economic and environmental issues because the area of non-productive clusters is using the chemicals, water and proppant without producing hydrocarbons.

The present state of the art in multi-cluster and zipper fracturing systems has been critically reviewed along five integrated dimensions:

- (1) Selection of stage isolation hardware and their operational trade-offs;
- (2) Geomechanical characterization as the basis for completion design;
- (3) Mechanistic understanding of perforation efficiency and the optimization of cluster spacing;
- (4) Zipper fracturing operational strategies and interwell interference management; and
- (5) Implementation of real-time diagnostic technologies to enable adaptive control.

The review also covers economic analysis and Environmental, Social and Governance (ESG) aspects and concludes with a suggested next-generation completion workflow based on an integrated approach. The synthesis is based on peer-reviewed publications from the last ten years (2015 – 2024) and gathered evidence from the Permian Basin (Wolfcamp/Spraberry), Bakken, Eagle Ford, Haynesville, and Marcellus formations.

### Justification

**Innovation:** This framework involves integrating real time DAS/DTS data with geomechanical simulators and AI-powered decision algorithms and is able to afford dynamic adjustments to pumping schedule, diversion timing, and zipper sequencing while a treatment is ongoing, which is not actually done in any known field application.

**Significance:** As the worldwide demand for more efficient energy production, while keeping pollution and other impacts at a minimum on the land surface, increases, unconventional resource production is required to do more with less: Less water, less chemicals, less emissions and less surface disturbance. The framework directly focuses on the billions of dollars that are being lost yearly

because of inefficiency in completion in a resource-heavy industry that is part of global energy security.

### Potential Real-World Impact:

**Policy:** Supplies regulators with benchmarks for completion efficiency standards and the level of environmental performance.

Accelerating industry efforts to build roadmap for the operators to generate savings between 15-22% in completion cost and 15-30% in EUR.

**Environment:** Less water used per barrel of oil equivalent (BOE) since less water gets used in an ineffective cluster treatment; less methane gas blows off the wellbore since wellbore integrity is improved.

**SDG 7 Affordable and Clean Energy:** More EUR per well lowers the price of energy obtained from alternative sources.

**SDG 8 (Decent Work and Economic Growth):** Optimized pad operations will help to create new jobs in engineering and data analytics.

Fiber optics sensing & AI assisted completion design is the key for the adoption as standard infrastructure - SDG 9 (Industry, Innovation and Infrastructure).

Under SDG 12 (Responsible Consumption and Production) lowers chemical and water use per BOE made.

**SDG 13 (Climate Action):** Optimize completions to minimize flaring, methane leakage and equipment operating time.

### Stage Isolation Methods: The Foundation of Zonal Control

In multi-stage hydraulic fracturing, the architecture/engineering is the foundation of stage isolation, which is the vehicle that mechanically steers fracture energy to the individual reservoir stages along the length of a horizontal well. The choice of isolation technology is not an operational choice but a strategic one that dictates the speed to completion, accuracy of fluid placement, and integrity of the wellbore and completed interval and consequently the producibility of the completed interval.

### Plug-and-Perf (PnP) Systems: Operational Precision at a Cost

Today, the plug-and-perf system is still the primary completion method utilized in North American unconventional mud operations where it is used for its flexibility of operation and control in zoning. A wireline or coiled tubing run and a gun activation are completed for each stage cycle to generate the multiple frac plugs (composites) and perforate the steel casing at predesigned depths (Figure 1). The same procedure can be repeated

from toe to heel and allows engineers to real-time optimise both stage and cluster placement in light of the discovery of the unexpected geology encountered during the drilling (Maxwell 2014). The main strength of the

system is its ability to change perforation location, the number of clusters, and stage lengths after drilling as a function of the sophisticated wellbore-logging data.



Figure 1: A perforating gun for creating pathways in the casing for the fluid injection during the hydraulic fracturing treatment of a well. (Source: U.S. Geological Survey, 2016)

But, the same level of activity reflects the non-productive time (NPT) and cost of operating PnP. Every time wireline is run, they have a discrete window of time for an operational stop where pumping is halted, resulting in the loss of time and mobilization expense. In addition, composite frac plugs will need to be drilled out after stimulation and prior to putting wells on production, a step that creates debris in the casing, can result in incidents with the tool string and adds one to two days per lateral to time to first oil (Weddle *et al.*, 2018). The biggest development in NPT elimination is fully dissolvable frac plugs (FDFs), built from a magnesium alloy to degrade along with other components, which allows them to leave the formation without the need for drill-out operations. However, their consistent dissolution under a variety of downhole temperatures (60°C to 180°C) and brine chemistry experienced at different basin is still a developing area (Zhou *et al.*, 2023).

#### **Ball-Activated (BA) Systems: The Operational Efficiency Frontier**

Ball activated sliding sleeve systems are a paradigm shift towards continuous and uninterrupted pumping operations. It is preinstalled as a part of the casing string during well construction and eliminates the need for repeated wireline runs by means of a number of incrementally sized ball seats. The flow sequence begins

when a calibrated ball is dropped onto the surface and acts as a seat on its corresponding profile, the pressure differential puts the sleeve in an open position, and the treatment fluid is able to enter the formation. An entire lateral can be stimulated with the same balls moving from heel to toe, thus decreasing completion time by 35-45% versus conventional PnP (Economides & Martin, 2007; Liu *et al.*, 2021).

The resulting speed increase has gigantic economic consequences. Quicker turnaround not only lowers the cost of rig-time, but increases the time to first barrel when operating unconventional wells, and boosts the early cash flow profile of unconventional wells a major consideration, as unconventional wells have high initial decline rates. But there are limitations to the BA paradigm. Traditional systems prescribe locations of stages in the casing design phase so that during drilling the favorable flexibility of location adaptation to the geological heterogeneity is sacrificed. Also, the conventional BA system results in a step up in inner diameter from the heel, because of ball seats accumulated (smaller inside), which influences the flow area of the well and wells future well interventions. Next generation liner top BA (Ball Seat) systems eliminate these constraints, allowing them to return the inner diameter to full bore but still provide the speed benefits (Zhou *et al.*, 2023; Nguyen *et al.*, 2023).

**Table 1:** Comparative Analysis of Plug-and-Perf (PnP) and Ball-Activated (BA) Completion Systems Across Key Performance Metrics

PARAMETER	PNP – STANDARD	PNP – DISSOLVABLE PLUG	BALL-ACTIVATED (BA)
COMPLETION TIME	High (5–7 days/lateral)	Moderate (4–5 days)	Low (3–4 days)
CLUSTER EFFICIENCY	50–60% (uneven flow)	50–65% (uneven flow)	65–78% (engineered flow)
OPERATIONAL FLEXIBILITY	High (post-drilling adjustment)	High (post-drilling adjustment)	Moderate (pre-set at casing run)
NPT / INTERVENTIONS	High (pump-down, drill-out)	Moderate (no drill-out required)	Very Low (continuous pumping)
WELLBORE RE-ENTRY	Full-bore after drill-out	Full-bore after dissolution	Limited (traditional) / Full (advanced liner-top)
COST PER STAGE	\$80,000–\$120,000	\$90,000–\$140,000	\$60,000–\$90,000
EUR IMPROVEMENT VS. BASELINE	Baseline	+5–10%	+15–25%
BEST APPLICATION	Complex geology; variable stage lengths	High-stage-count laterals	Long laterals; high stage counts; time-sensitive pads

*Note. Data synthesized from Weddle et al., (2018), Economides & Martin, (2007), Nguyen et al., (2023), and Zhou et al. (2023). NPT = non-productive time and EUR = estimated ultimate recovery.*

**Geomechanical Characterization: The Indispensable Foundation**

In the literature published, a mathematically consistent completion design often starts with an understanding of geomechanics. Because of the geologic variations in mineralogy, brittleness, NFD, and alpha in unconventional reservoirs, geometric intuition typically fails in the completion design for unconventional reservoirs and frequently results in poorer than expected performance. Building a calibrated Mechanical Earth Model (MEM) is now accepted as a best practice to de-risk the completion designs in the complex unconventional formations (Zoback et al., 2010).

**Key Geomechanical Parameters for Fracture Design**

There are three principal stress components, minimum horizontal stress ( $\sigma_{hmin}$ ), maximum horizontal stress ( $\sigma_{Hmax}$ ), and overburden stress ( $\sigma_v$ ) that control the behavior of hydraulic fracture and along with it, the elastic moduli of the rock (Young's Modulus, E, and Poisson's Ratio,  $\nu$ ) are critical parameters. Young's modulus controls fracture width – the stiffer (higher Young's Modulus), the narrower and longer the fracture and the more compliant (lower Young's Modulus), the wider and shorter the fracture. Poisson's ratio affects fracture shape and effectiveness in transmitting pressure. In the Eagle Ford Shale, Young's modulus typically could be correlated with calcite content; carbonate-rich intervals have been correlated with E values of 30–60 GPa, while clay-rich intervals could be correlated with E values of 10–25 GPa

(Goodarzi et al., 2022). This heterogeneity at the millimeter to meter scale is the direct control of the temporal variation of fracture initiation and propagation. A hierarchy of methods for in-situ stress data acquisition exists. The dipole sonic logs can be used to generate continuous wellbore scale profiles of the dynamic elastic moduli derived from the compressional and shear wave velocities. Because core based triaxial tests give static elastic constants whereas dynamic elastic constants can be measured on the offshore structure, they will normally differ by 10-30% which will need an empirical correction factor (Fjaer et al., 2021). The industry standard to directly measure closure pressure ( $\sigma_{hmin}$ ) and near-wellbore flow properties is still Diagnostic Fracture Injection Tests (DFITs), where a small volume of fluid is injected and pressure decline is recorded (Barree et al., 2015). When these data sources are integrated into a 3D MEM, the mechanical stratigraphy, or change of rock properties with depth, that is important for fracture height containment and inter-stage communication can be determined by the engineer.

**Numerical Modeling and Mechanical Earth Models**

The MEM is used as input to modern hydraulic fracture simulators, from planar 2D/3D models to more complicated unconventional fracture models (UFMs) that incorporate a natural fracture network. A well-calibrated model helps optimize (enable 'what if' scenarios) cluster spacing, stage length, fluid volume as well as proppant schedule before fluid is pumped, significantly de-risking

the operation (Weng, 2015; Figure 2). Fully coupled geomechanical reservoir simulators also provide an understanding of pore pressure and stress change during production, which can provide accurate prediction of

long-term decline behaviour and geomechanical consequences of infill well development.

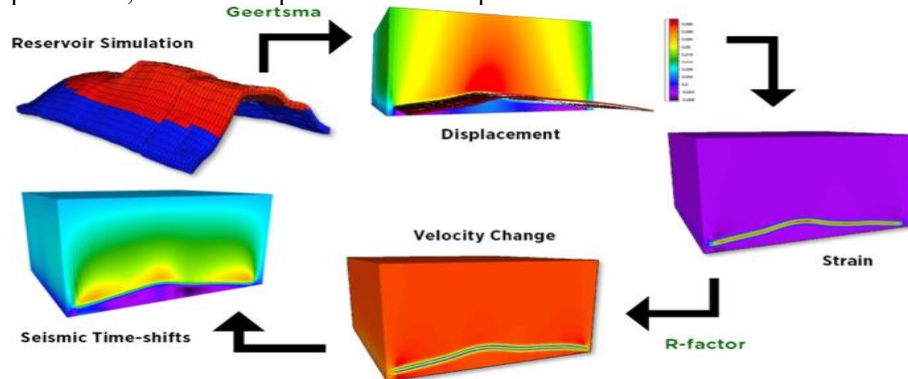


Figure 2: Workflow that shows how geomechanical data can be used to characterize and model the reservoir. (Source: Alao, 2026)

This Method has the drawback that the data themselves are subject to fundamental data uncertainty due to subsurface characterization. Well logs are one-dimensional and represent just a small fraction of the profile; core samples are limited and costly and there is a lot of uncertainty between the core or log data points. With the advent of machine learning methods trained on an integrated data set from multiple wells, prediction of geomechanical property distribution in 3D space with established uncertainty bounds is increasing (Anifowose *et al.*, 2017). This data-based enhancement to the physics-based models is an important area in completion geomechanics.

### Cluster Spacing Optimization and Perforation Efficiency

The point where geomechanical thinking and insight needs to be taken into engineering decisions is when the perforation cluster locations within each treatment stage are designed. The goal is to create multiple fracture limbs that are hydraulically separated from others that are initiated at each skyjacking stage and each fracture will stimulate a different reservoir volume without robbing from its neighbors.

### From Geometric to Engineered Cluster Placement

The most significant industry development related to unconventional completion design and placement for that matter is the transition from “geometric” (uniform spacing) cluster placement to “engineered” cluster placement. In the presence of rock type variability, geometric designs in heterogeneous reservoir demonstrate to be inefficient, where the set inter-cluster distance is fixed at 50-100 ft, irrespective of the rock-type properties.

One engineered methodology involves using the local MEM to locate clusters in intervals with similar geomechanics, defined as a similar breakdown pressure, brittleness and natural fracture density, thus ensuring the probability of all clusters receiving fluid (McDaniel *et al.*, 2021).

Modern completions include tighter cluster spacing (15 to 30 ft) compared to early designs (80 to 120 ft), which has been the industry trend to favor and grow more dense fractured networks and SRV. There is, however, an important point of diminishing returns: When the spacing falls below a threshold for a given formation, inter-fracture stress shadows are strong enough to inhibit fractures in the outer clusters, so that a preferred, unconfined fracture can form at the zone's center. The optimum cluster spacing (OCS) range based on the reservoir depletion efficiency and stress shadowing effect in the Eagle Ford wet gas window was determined to be 14–20 ft (Morales *et al.*, 2024). In the Wolfcamp A in the Midland Basin, which has more in-situ stress anisotropy, optimal spacing was reported to be 20-35 ft (Shahri *et al.*, 2021). This highlights the fact that the spacing should not be treated as a general design parameter, but rather depends on the reservoir.

### Limited Entry Perforation Design and Fluid Distribution

The natural variation in the near-well environment (heterogeneity) causes differential resistance to fracture initiation in fractures originating from a single stage in the engineered clusters. The cluster with the lowest net pressure requirement will receive the most treatment fluid, while other clusters will be left under stimulated. The 'limited entry' (LE) perforation design is the primary mitigation strategy: by deliberately restricting the number

and/or diameter of perforations, engineers impose a deliberately high perforation friction pressure drop ( $\Delta P_{perf}$ ) at the wellbore. When  $\Delta P_{perf}$  is engineered to exceed the variation in fracture initiation pressure across clusters, fluid is effectively forced into a more uniform distribution.

$$\Delta P_{perf} = (0.2369 \times \rho \times Q^2) / (n^2 \times Cd^2 \times d^4) \quad (1)$$

Where  $\Delta P_{perf}$  is perforation friction (psi),  $\rho$  is fluid density (lb/gal),  $Q$  is pump rate (bbl/min),  $n$  is number of perforations,  $Cd$  is discharge coefficient (~0.6–0.9), and  $d$  is perforation diameter (inches). Maximizing  $\Delta P_{perf}$  by reducing  $n$  or  $d$  forces equalized fluid distribution across clusters.

Wang & Sharma (2022) demonstrated that LE designs with perforation friction exceeding 800 psi achieved cluster efficiency improvements of 25–35% in Permian Basin horizontal wells, based on DAS confirmed fluid entry profiling. The critical engineering challenge is to achieve sufficient perforation friction for equalization without creating excessive surface treating pressure or erosion-induced perforation enlargement that degrades the LE effect over the course of the treatment.

### Zipper Fracturing Operations and Inter-Well Geomechanics

Zipper fracturing the coordinated, alternating stimulation of two or more adjacent horizontal wells from a shared pad has become standard practice in unconventional pad development. The technique has two value propositions: optimisation of the use of equipment and geomechanical enhancement by engineering a stress field between co-developed wells.

### Geomechanical Mechanics and Operational Variations

Stress interference between adjacent wells is the basic geomechanical idea behind the zipper fracturing process. If the stage in a well in Well A is fractured, the fracture will squeeze the surrounding rock mass and increase the minimum horizontal stress across the inter-well space. When the same stage in Well B is fractured later, the stress from the previous fracture acts as a barrier and is higher than normal, causing the fracture from Well B to be deflected away from Well A, into more rock that has not been stimulated, adding additional SRV between the two wells. When optimally timed, this process forms a more complex and branching fracture network than can be created with isolated well stimulation (Roussel & Sharma, 2011; Guo *et al.*, 2021).

Three major modes of operation are reported in literature (Figure 3). Simultaneous fracturing refers to fracturing both wells at the same time, which reduces equipment cost and doubles the equipment utilization, yet infers risks of fracture competition, if the inter-well stress field is not

carefully managed. The industry standard, sequential zipper fracturing, alternates stages between wells (A1, B1, A2, B2), leaving enough time for the stresses to redistribute between wells. Modified zipper fracturing adds a designed stage offset (A1, A2, B1, B2) where a higher stress is imposed before commencing treatment in the adjacent well, but this results in increased complexity and possibly an increased constructive stress effect (Nagel *et al.*, 2013). Along these lines, 90-day cumulative production improvements of 18–26% were observed with sequentially zipped wells in the Permian Basin as compared to non-zipped, sequentially stimulated wells (Tian *et al.*, 2019).

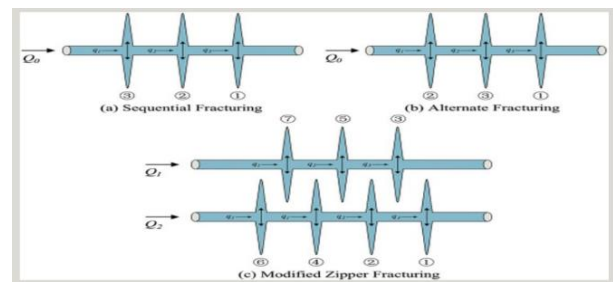


Figure 3: Schematic diagrams showing the differences in fracture geometry between (a) sequential fracturing, (b) alternate fracturing, and (c) modified zipper fracturing (with staggering), showing increased complexity. (Source: Tian *et al.*, 2019)

### Frac Hits: The Defining Challenge of Multi-Well Development

In a zipper operation there is the well-defined and potential problem of communication between the well being Zhanged (the child), and the offset well (usually the older well and has already been exhausted) due to the proximity of the wells (the parent well). One of the most economic-significant events in unconventional operations is a frac hit. Several wells observed the effects of direct pressure communication, including casing deformation in the offset well, and has been reported in as many as 10–15% of the parent wells in the Permian Basin that are less than 500 ft away (Ajani & Kelkar, 2012). When fluid enters a producing offset well, it results in an expensive shut-in, water clean out of the treated well, and fluid to be produced containing proppant which will cause production equipment damage. Most important: Fracture energy allocated to parent well corresponds to an irreversible loss of fracture network quality and EUR for the child well.

Frac hits are not a binary occurrence but fall on a spectrum from light pressure pulses that only sensitive gauges can reveal to very severe direct fluid connection that requires the intervention of workover. Daneshy (2020) divided the

severity of a frac hit into three categories; pressure communication, fluid communication, and mechanical damage and found that inter-well distance, treatment volume, and the distance to the depleted parent well pressure zone are inversely correlated with the likelihood of each tier. Strategies to mitigate communication include dynamic parent well pressure management (injecting to maintain high parent well bottomhole pressure to 'shield' it from approaching child fractures), optimized zipper sequencing (avoiding stages closer to the parent well), and real-time monitoring the pressure (to detect and respond to communication at an early stage before extensive damage occurs) (Manchanda *et al.*, 2020).

### Stress Shadowing: The Critical Geomechanical Constraint

For multi-cluster and multi-stage fracturing, the main constraint in the well from a geomechanical perspective is stress shadowing, which is the creation of a higher minimum horizontal stress along the length of the hydraulic (cleat) fracture. It is necessary to have an understanding and control of stress shadowing to ensure

even fracture distribution and maximizing the productive fracture surface area per stage.

### Physical Mechanisms and Consequences

If the fracture is propped open, the rock matrix surrounding the fracture is displaced permanently and the fracture is closed in compression in the plane perpendicular to the fracture leading to an increase in  $\sigma_{\text{min}}$  in the adjacent volume. This 'shadow' of high stress comes with a number of consequences when treating fractures later: (1) fractures formed in high stress areas need a higher breakdown pressure, making them harder to open and easier to leave unopened by fluid flowing to and stimulating less resistant clusters; (2) fracturing that involves pushing over the shadow into the high stress zone can propel fractures away from their direction toward the less stressed zone and thus reduce the propped fracture half-length by 15–35% (Nagel & Sanchez-Nagel, 2011; Wu *et al.*, 2017); and (3) the high stress in the shadow zone limits the extent of propping and therefore reduces the fracture conductivity of subsequent fractures that interact with an existing fracture (Figure 4).

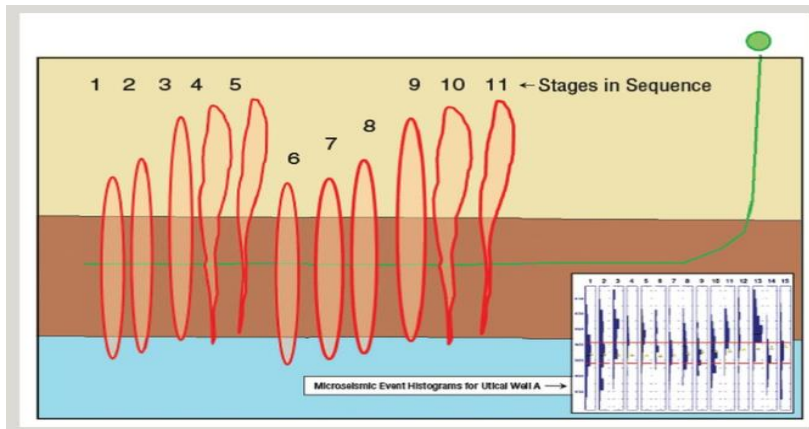


Figure 4: Stress shadowing's influence on multi-stage fracture spacing, displaying sequential stages and microseismic event histograms. (Source: Dohmen *et al.*, 2015)

### Quantifying the Stress Shadow

The magnitude of the stress perturbation created by a single planar fracture can be estimated from the classical Sneddon (1946) solution for an internally pressurized elliptical crack, which yields the following simplified approximation for the stress increment at a perpendicular distance  $r$  from a fracture center:

$$\Delta\sigma \approx (p_{\text{net}} \times a^2) / (r^2 + a^2)^{3/2} \text{ [simplified 2D approximation]} \quad (2)$$

$\Delta\sigma$  is the increment of stress (MPa),  $p_{\text{net}}$  is the net fracture stress (MPa),  $a$  is the fracture half-height (m) and  $r$  is the perpendicular distance from the fracture plane (m). We see that the amplitude of the shadow effect

decreases very quickly with the distance between clusters as the dependence is inverse power 3.

Field data from the Bakken Formation show that microseismicity features reveal fracture half-length can be reduced by 20-40% on later stages of a multi-stage sequence, systematically, and due to stress shadowing (Nagel & Sanchez-Nagel, 2011). To take advantage of instead of fight this phenomenon, advanced treatment sequencing strategies have been developed. A method to intentionally fracture non-adjacent clusters first and then to use the stress shadows generated to create a more complex, branching fracture is known as the 'Texas Two-

Step' and has shown an improvement in SRV complexity in field trials in the Permian Basin (Sardinha *et al.*, 2014).

### Real-Time Monitoring and Adaptive Control Technologies

The biggest breakthrough in hydraulic fracturing technology today is the ability to see, measure and react to fractures in real time as they occur downhole. A major paradigm shift is going from a today's "prescriptive" approach, which is "design and execute," to one that is "responsive" and allows real-time feedback between what was designed to be completed and what is actually being completed downhole.

### Fiber-Optic Sensing: Distributed Acoustic and Temperature Sensing

The industry's most accurate real time view of downhole fracture behaviour is provided by permanently installed fiber-optic cables cemented in the annulus, or strapped on the production tubing. Distributed Acoustic Sensing (DAS) looks into Rayleigh reflection patterns across the optical fiber length to generate thousands of virtual microphones all along the wellbore. The acoustic

signature of the fluid and proppant exiting the perforation clusters produces characteristic DAS responses that can let the engineers quantify the flow contribution (or the lack of flow contribution) of each perforation cluster in real time (Ugueto *et al.*, 2019; Jin & Roy, 2017). The maps obtained from DAS have consistently demonstrated that between 30 and 40% of stage fluid volumes are not spent on perforation clusters in conventionally designed PnP completions, offering by far the best quantitative assessment of what the multitude of inefficiency is in these traditional completion designs.

The same fiber-optic system can be used for Distributed Temperature Sensing (DTS), which uses the temperatures difference formed by the introduction of cool fracture fluid into the warm formation. Wellbore temperature changes offer a complimentary spatially resolved measure of fluid into the well which is ideal for identifying the major fracture clusters and verifying the effectiveness of diversion treatments. Altogether, DAS and DTS are a dual-observable data set that coupled to surface treatment pressure and rate allows for real-time, quantitative cluster efficiency assessment that does not need post job intervention. (Figure 5).

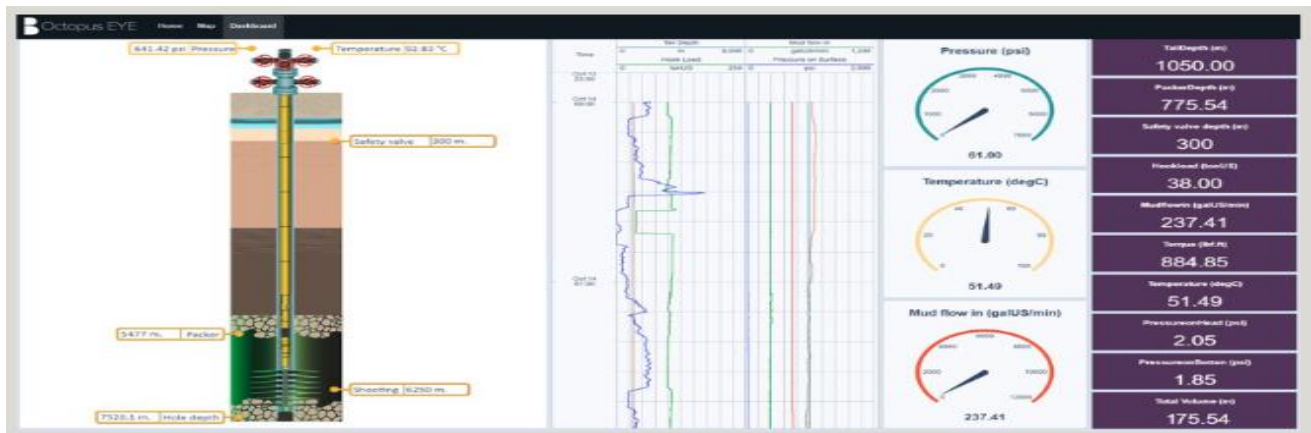


Figure 5: Real-time monitoring interface showing the completion process and key parameters like pressure, temperatures, etc., and fluid entry aspects.

**Microseismic Monitoring:** Microseismic monitoring uses arrays of geophones which can be placed on the surface, in shallow monitoring wells or downhole in the treatment wellbore to capture and map the very small shear-slip events that occur in response to the propagation of the fracture network. The subsequent 3D distribution of microseismic event locations offers the most widely observed direct measure of the extent of the SRV. The data from microseismic is routinely used to validate fracture simulator predictions, validate assumptions used in analysis by MEM, and to identify unexpected fracture growth, including those that grow up out of the zone that

could be communicating with overlying water-bearing formations (Maxwell, 2014).

**Chemical and Mechanical Diversion:** Real-time diagnostics can be most effective if they are directly linked to a fluid adaptive diversion strategy to prioritize treatment fluid delivery to less performing clusters. Particulate diverters are generally the polylactic acid (PLA) particulates designed to degrade within the reservoir temperature and pressure range, and introduce slugs of these particulates into dominant fracture entry points, which bridge the perforation cluster or the near-

well-point fracture. The pressure that results is then rechanneled to other clusters which are not being stimulated. DAS was successfully utilized for real-time diverter deployment to identify and then restimulate under-performing clusters to improve efficiencies by 20–28% and increase 90-day gas production in a field trial in Haynesville Shale (Wheaton, Miskimins, & Barree,

2020). The mechanism of action of a viscoelastic surfactant (VES) diverter is different and involves a viscosity increase that is proportional to the flow velocity in the dominant fracture entries to produce self-regulating flow redistribution without the need to make decisions as to which diverting to provide.

**Table 2:** Comparative Assessment of Real-Time Diagnostic and Diversion Technologies for Multi-Cluster Completion Optimization

TECHNOLOGY	MEASUREMENT TYPE	SPATIAL RESOLUTION	KEY ADVANTAGE	KEY LIMITATION
<b>DAS (DISTRIBUTED ACOUSTIC SENSING)</b>	Acoustic (Rayleigh scatter)	~1 m along wellbore	Real-time, continuous cluster efficiency quantification	Requires permanent fiber installation; capital-intensive
<b>DTS (DISTRIBUTED TEMPERATURE SENSING)</b>	Temperature differential	~1 m along wellbore	Thermal fluid entry confirmation; complements DAS	Delayed thermal response; less effective in low-rate clusters
<b>MICROSEISMIC</b>	Shear-slip seismic events	±15–50 m (depth dependent)	3D SRV mapping; fracture height confirmation	Uncertain event-to-fracture attribution; requires dedicated monitoring well
<b>PLA PARTICULATE DIVERTERS</b>	Mechanical pore-throat plugging	Cluster-scale	Strong diversion signal (pressure response); low formation damage	Potential incomplete degradation at low temperatures; cost
<b>VES DIVERTERS</b>	Viscosity-controlled flow resistance	Cluster-scale	Minimal formation damage; self-regulating	Difficult to quantify diversion success in real time
<b>TILTMETER ARRAYS</b>	Near-wellbore fracture opening strain	Stage-scale	Provides fracture azimuth/dip data	Low resolution; near-wellbore only

*Note. Synthesized from Ugueto et al. (2019), Holt et al. (2022), Zhang & Sun (2023), Maxwell (2014), and Barree et al. (2015). DAS = distributed acoustic sensing, DTS = distributed temperature sensing, VES = viscoelastic surfactant, and SRV = stimulated reservoir volume.*

**Economic Analysis: Quantifying the Value of Advanced Completions**

Finally, if it is going to be worth utilizing any advanced completion technology, it will require improved economic returns. Paradigms of different completion are compared on an analytical basis through the net present value (NPV), which includes capital expenditure, production performance, operating costs and commodity price sensitivity.

**NPV Modeling Framework** A representative NPV model was constructed to compare three completion scenarios: (1) a baseline standard PnP system; (2) an advanced PnP system with limited entry perforation

design and real-time DAS monitoring; and (3) a BA system with continuous pumping, engineered cluster spacing, and integrated diversion. The model parameters are representative of a 10,000 ft lateral in the Midland Basin (Wolfcamp A), with 50 stages, an oil price of \$70/bbl (WTI), a discount rate of 10%, and a 30-year well life. Production forecasts were derived from Arps hyperbolic decline curve analysis calibrated to basin-specific analog well data (Ugueto et al., 2016; Bhattacharya & Nikolaou, 2016).

$$NPV = \sum_{t=1}^T [(Rt - Ct) / (1 + r)^t] - C_0 \quad (3)$$

Where  $R_t$  is annual revenue from production (\$),  $C_t$  is annual operating cost (\$),  $r$  is the annual discount rate (decimal),  $C_0$  is initial capital cost (drilling + completion, \$), and  $T$  is well life (years). The Arps decline model governs  $R_t$ :  $q(t) = q_i / (1 + b \cdot D_i \cdot t)^{1/b}$ , where  $q_i$  is initial rate,  $D_i$  is initial decline rate, and  $b$  is the hyperbolic exponent (0.8–1.4 for tight oil).

**Economic Performance Comparison: Table 3:** Economic Comparison of Three Completion Paradigms for a Representative 10,000-ft Lateral Horizontal Well (Midland Basin, Wolfcamp A)

ECONOMIC METRIC	BASELINE PNP	ADVANCED PNP + DAS	BA SYSTEM + DIVERSION
INITIAL COMPLETION COST (PER WELL)	\$7.2M	\$7.9M (+10%)	\$7.6M (+6%)
COMPLETION TIME (DAYS)	6.2 days	6.0 days	3.8 days (-39%)
CLUSTER EFFICIENCY (%)	~55%	~72%	~75%
365-DAY CUMULATIVE OIL (BBL)	280,000	336,000 (+20%)	364,000 (+30%)
EUR (30-YEAR, BBL)	1,050,000	1,260,000 (+20%)	1,344,000 (+28%)
NPV (10%, 30 YR)	\$4.1M	\$5.3M (+29%)	\$5.9M (+44%)
LIFECYCLE COST PER BOE	\$25.70	\$21.90 (-15%)	\$20.10 (-22%)
TIME TO BREAK-EVEN (OIL PRICE)	\$48/bbl	\$44/bbl	\$42/bbl

Note. Synthesis and extrapolation of data from Nguyen *et al.* (2023), Bhattacharya & Nikolaou, (2016) and Weddle *et al.*, (2018). Discount rate is 10%, an oil price assumption of \$70/bbl WTI was used, and a 50-stage well with 10,000 ft lateral assumed. BOE = Barrel of Oil Equivalent; EUR = Estimated Ultimate Recovery.

The analysis of the economy clearly suggests there is a gradient of the value creation of the systems from the baseline to advanced completion. The BA system with built in diversion affords the highest EUR and NPV, largely due to two factors: first, completion time was reduced by 39% which resulted in faster production onset and reduced rig-day expenses and, second, cluster efficiency improved by 20%, providing direct increase in productive fracture surface area. The advanced PnP system with DAS clearly shows that the technology investment does not have to be all or none: half-way measures towards upgrading PnP (real time monitoring and adaptive diversion) give EUR and NPV benefits of 20% and 29% at 10% higher investment cost over the reference system.

**Environmental, Social, and Governance (ESG) Considerations**

Advanced fracturing technologies are technologically and economically independent of and cannot be divorced from

their environmental and social context. In a world of unprecedented regulatory and public gaze, the advent of unconventional development and its new characteristics has placed the process of fracturing under a harsh spotlight, which has led to a more robust ESG system in addition to technical performance measures.

**Water Resource Management (SDG 6):** Hydraulic fracturing requires a lot of water; 5 to 20 million gallons of water on average are used in a single multi-stage completion in the Permian Basin (Scanlon *et al.*, 2017). There are two ways in which advanced completion technologies can help save water. First, increasing cluster efficiency will have the effect of using a higher proportion of the injected fluid to generate productive fractures and not absorb into clusters that are not contributing, resulting in an increase in the 'hydraulic efficiency' (BOE produced per gallon of fluid injected) of the job. Second, faster BA completions lower total time water is spent being handled on the surface, resulting in a smaller time window for

water to be stored, transported and disposed. The greater use of produced water recycled by major operators in the Permian Basin to 70-90% rate further reduces demands for freshwater (Scanlon *et al.*, 2017).

#### **Induced Seismicity and Geohazard Management:**

Deep injection disposal of wastewater is the biggest contributor to induced seismic activity in the United States midcontinent, and is the most common method of managing produced water from unconventional operations. By contrast, the seismic risk from hydraulic fracturing per se has been relatively low but not insignificant, inasmuch as some fractures may generate risk of reactivation of faults when they intersect zones of critically stressed faults on which the treatment is located. Based on the expert opinion of those who have interacted with the MEM as it has started to address the question of induced seismicity during fracturing, the initial defense against induced seismicity is geomechanical modeling, that is the formal incorporation of fault stability analysis into the MEM workflow. More and more jurisdictions are now requiring real-time seismic monitoring with 'traffic light' provisions to indicate decreases in pumping rates when a certain magnitude of the seismic event is observed and to cease pumping when even larger event magnitudes are observed.

**Atmospheric Emissions and Climate Impact (SDG 13):** Pressure is mounting for the hydraulic fracturing industry to do more to curb the amount of methane natural

gas's main ingredient in the atmosphere, as methane has a global warming potential around 80 times that of carbon dioxide. ACUMSAT, which places satellite-derived data in real time into simulators, is a key factor in helping to reduce emissions; several MPR models run in situ to help manage high Santos levels during acid gas injection; new completion technologies have helped lower emissions in several ways: A reduction in completion time increases downtime on diesel-powered pump fleets (which are a major CO<sub>2</sub> source on remote pads), casings have improved to reduce the risk of sustained closure pressure to wells caused by casing failure, and more efficient fracture networks have allowed for a reduction in the number of wells to develop an acreage area, decreasing surface disturbance. Converted electric fleet powered by field gas or grid power (e-fracs) is the largest opportunity for emissions reduction and is being increasingly implemented on a larger scale by major players (Alvarez-Espinoza & O'Sullivan, 2021).

**Integrated Framework and Future Directions:** The synthesis discussed here culminates this review in a central and intriguing conclusion that can be summarized by the goal of unconventional completion design a smart integration of the geomechanics, hardware, operational strategy, and real-time adaptive control in one decision-making framework. One application of this principle, to be followed in the boats operation might be laid out in the following steps:

- 1 – Pre-Drilling Geomechanical Intelligence: Obtain and integrate core, log (dipole sonic and image) and DFIT data and build a calibrated 3D MEM on the target interval.
- Step 2 – Simulator-Guided Completion Design Conduct ensemble hydraulic fracture simulations with the MEM that includes stress shadowing and natural fracture interactions for optimization of cluster spacing, limited entry perforation design and stage length.
- Step 3 – Hardware Selection: See formation heterogeneity and operational priorities and select isolation system (BA for high stage count, time sensitive pads or engineered PnP for complex geology where adaptive placement of clusters is needed).
- Step 4 – Fiber-Optic Infrastructure Deployment (installing permanent DAS/DTS fiber during casing run for real-time treatment monitoring).
- Step 5 – To execute treatment with real time DAS/DTS cluster efficiency monitoring and Deploy particulate or VES diverters when DAS identifies clusters that are not contributing.
- Step 6 – Post-Treatment Model Calibration: Adjust the pre-frac simulator with treatment information, and confirmed DAS cluster efficiencies and calibrate the MEM for application to future wells on a pad.
- Step 7 – Production-Based Learning: Harmonize fractured model and early production from parent and children wells to optimize completion design of infill wells using knowledge gained from parent-child well interaction observed.

There are still key research gaps that hinder the realization of this integrated framework. First, the published production performance comparisons between BA and PnP are short-term (90-365 days) and tend to be

statistically limited for long-term (>3-year) comparisons, because many of the published studies compared short-term production performance measures which may not reflect the production performance measures that dominate EUR calculations. Second, real-time, autonomous diversion control is still at a 'proof-of-concept' stage, testing of which has been limited and not widely validated on field scale using machine learning. Third, there is little standardized lifecycle environmental impact analysis (LCAs) literature available in the peer-reviewed community which regularly compares the per-BOE environmental impacts across different completion designs such as water usage, chemicals, atmospheric emissions, etc. to enable policy makers to encourage designs with a smaller environmental impact.

#### Stakeholder Perspectives: Academic vs. Industry

**Priorities:** Literature survey shows that academic research and industry operational challenges are two fields which do not seem to agree much on even a perusal of the literature. Most research efforts have been directed towards numerical modeling of simplified fracture geometries, theoretical optimisations of cluster spacing in homogeneous media and simple fundamental geomechanical parameter sensitivity analysis. As basic to the science as they are, the studies typically ignore the operational aspects that play a large role in making field of execution decisions, equipment reliability, wireline risk, proppant transport uncertainty and the non-stationarity of the actual formation properties (Cipolla & Wallace, 2014). The case studies published by industry, by contrast, often disclose proprietary information, provide conclusions valid only for the operators in the case, and the conclusions may be strongly influenced by short-term economic considerations that may differ from the long-term goals for managing the reservoir.

The convergence of these perspectives in an open, multi-well, standardized dataset along with a common and numerical modeling approach, is the most pressing scientific need in the unconventional completion engineering arena. Programs such as the Frac Focus chemical disclosure registry and the DOE unconventional reservoir research consortium are initial examples of moves in this direction, but even the progress made is limited in the amount of data provided to meet the model calibration and validation needs of the next generation of completion frameworks that are getting closer to being integrated.

#### Conclusion

This review has given a detailed, critical synthesis of the state-of-the-art multi-Cluster/zipper fracturing systems for unconventional hydrocarbon recovery. With these new shale completion workovers, it's not about the blend

of technologies; but the intelligent application of those technologies and their integration into the systems approach which will give the shale spacing the best chance to be completed successfully.

There is no ambiguity about the data and facts and successful outcomes are clearly being achieved where economic outcomes are better as a result of the benefits of highly capable completion systems. The ball activated systems can decrease completion times by 35–45%, the advanced perforation design can bear fruit in cluster efficiencies up to 72–78% compared to 55% and the combined use of these technologies can deliver EUR gains of 20-30%, while helping to save 15-22% of LCOB. When designing and sequencing well stimulation programs, zipper fracturing almost always leads to a 18-26% boost in early cumulative production compared to introducing a well stimulation program without taking inter-well interaction into account. Meanwhile, this review has also revealed significant knowledge gaps in the current knowledge landscape limiting the industry's ability to fully realize the potential of these technologies: lack of long-term (>3 year) production comparisons across completion paradigms, lack of AI based real-time adaptive control systems that have been tested at field scale, and lack of standardized life cycle environmental analyses. The gaps in understanding and knowledge will necessitate a joint effort to create open datasets, a greater increase in the number of permanent monitoring infrastructures using fiber-optic technology, and a continued investment in multi-disciplinary research to integrate geomechanics, materials science, data science, and petroleum engineering disciplines.

This correlation of these technical developments with the SDG's of the United Nations (Exp. 7, 8, 9, 12 and 13), points out that unconventional completions are not merely a step towards solving today's energy world problems, but also towards the energy efficiency and knowledge base of the future. The multi-layered approach described in the present review will also help engineers, operators and policy makers to develop a "how-to"-list to achieve the challenge of doubling up.

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