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Inclusion orientation dependent flaking process in rolling contact fatigue observed by laminography using ultrabright synchrotron radiation X-ray

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Key words: Rolling contact fatigue; Crack path; Image processing; Inclusions; Finite elements

1 Abstract

2 The formation and propagation of cracks in rolling contact fatigue were observed by synchrotron
3 radiation computed laminography, and the effect of stringer-type inclusion orientation was examined.
4 For longitudinal inclusions, cracks started forming at their tips. After cracks propagated toward the
5 rolling direction, a longitudinal crack was kinked simultaneously at both its tips, and propagated
6 toward the direction perpendicular to the rolling direction to form lateral cracks. After kinking,
7 horizontal cracks were formed from the deepest point of a lateral crack, leading to flaking. On the
8 other hand, for specimens with lateral inclusions, cracks propagated to the lateral direction without
9 the formation of longitudinal cracks. Since the propagation life of lateral cracks and that of horizontal
10 cracks were unrelated to the inclusion orientation, the rolling contact fatigue life of specimens with
11 longitudinal inclusions was considerably longer than that of specimens with lateral inclusions.

12 1 INTRODUCTION

13 Rolling contact fatigue (RCF) is a crucial factor for mechanical elements subjected to rolling
14 contact. To extend the service life of machinery subjected to rolling contact, such as bearings, gears,
15 wheels, and rails, it is necessary to investigate the RCF mechanism and mechanics. In gears, wheels,
16 and rails, macroscopic slips play an important role in the RCF damage process,^{1, 2} where strong
17 friction (tangential force) is induced on the rolling contact surface, and surface cracks start to form
18 and propagate obliquely from the surface and eventually grow to form RCF damage called shelling³
19 or pitting.² In contrast, bearings are generally applied under pure rolling contact and oil lubrication
20 with weak friction without macroscopic slips. In this case, it has been believed that cracks start to
21 form beneath the surface, leading to RCF damage called flaking.

22 The above-described difference was attributed to the stress intensity factor range of cracks below
23 the surface,⁴ or shear stress distribution.⁵ Not only the initiation site, but also the initiation mechanism
24 of cracks differs in RCF between strong and weak friction, *i.e.*, shelling/pitting and flaking.⁶ The
25 mechanics of shelling/pitting was analyzed on the basis of fracture mechanics^{1,7,8} and on the basis of
26 shear stress calculated by finite element (FE) analysis.⁹⁻¹¹ Microstructural alterations of the matrix
27 beneath the surface have been considered as important causes of RCF without friction under oil
28 lubrication. Such alterations may be a dark etching area (DEA),^{12,13} dark etching constituent (DEC),¹²
29 dark etching region (DER),^{12,14} and martensite transformation from retained austenite,¹³ which occur
30 in high-stress regions under the ball track. As the number of fatigue cycles increases, characteristic
31 microstructures appear, such as the white band (WB),^{12,13} which is type a of shear band, the white
32 etching band (WEB),^{12,14} white etching area (WEA),^{12, 15-19} white etching cracks (WEC),^{14,16} brown
33 etching layer (BEL),¹⁵ and butterfly cracks.¹⁷ The WEA was found to be composed of ultrafine
34 nanocrystalline ferrite grains, voids, and spherical carbides, as observed by transmission electron
35 microscopy.¹⁶⁻¹⁸ Hiraoka et al.²⁰ observed that WEA occurred after microcrack initiation. Martin et
36 al.²¹ examined microstructural alterations, which develop with cyclic stressing under rolling contact,
37 and attempted to define their nature and formation mechanisms. In many cases, ‘winglike’ structural
38 alterations, commonly called ‘butterflies’, were microcracks associated with inclusions.^{19,22,23} Evans
39 et al.¹⁷ conducted 3D reconstruction of the butterfly wing by cross-sectional focused ion beam (FIB)

40 milling with an average slice thickness of 350 nm. Although numerous studies have been conducted
41 on microstructural alterations, the process from microstructural alteration to flaking has not yet been
42 clarified.

43 On the other hand, Kanetani and Ushida reported that cracks usually started forming from non-
44 metallic inclusions rather than WBs.¹² The detrimental effect of inclusions in terms of RCF has been
45 discussed,^{17,19,20,24-41} and it has been found that the size, shape, orientation, location, composition of
46 inclusions, and interface conditions between inclusions and the surrounding matrix can be considered
47 to be factors affecting the RCF life. The refinement of inclusions contributes to improving the RCF
48 strength. Chen et al.²⁵ investigated how the type, size, and location of inclusions control crack
49 initiation in the RCF test. Lewis and Tomkins³⁰ applied the root-area parameter model to predict
50 microcrack propagation from inclusions. Hashimoto et al.²⁹ concluded that smaller inclusions, high
51 interfacial strength, and smaller differences in Young's modulus between an inclusion and the
52 surrounding matrix led to longer RCF life.

53 Most of the above-mentioned studies focused on internal inclusions. It has been recognized that
54 flaking starts from inclusions beneath the surface where the ball track is located and the shear stress
55 is greatest, and the cracks grow from them toward the surface.^{39,40} On the other hand, Nagao et al.²⁶
56 reported that the mechanism depended on the shape of inclusions, *i.e.*, horizontal cracks were formed
57 from spherical inclusions, whereas lateral cracks were first formed from stringer-type inclusions
58 whose long axis was perpendicular to the rolling direction (lateral inclusion). In this case, horizontal
59 cracks were formed after the formation of lateral cracks. The formation and propagation of lateral
60 cracks were considered to be controlled by the normal stress, whereas the propagation of horizontal
61 cracks was controlled by the shear stress. Tsuchida and Tamura³² observed that horizontal cracks
62 were formed from spherical inclusions, however; they considered that crack initiation was controlled
63 by the normal stress. These observations were conducted by terminating the RCF test before flaking
64 occurred and cutting the specimens. Therefore, sequential observations of the initiation and
65 propagation of the lateral crack and horizontal crack, and the flaking process have not been conducted.

66 Alley and Neu⁴¹ analyzed the effect of the orientation on lateral inclusions. Their analysis was
67 based on the stress beneath the surface, which was calculated by FE analysis. They found that RCF
68 strength is lowest for inclusions with the orientation of 45°, where the orientation is defined as the
69 complementary angle between the long axis of an inclusion and the normal of the surface, and the
70 RCF strength is highest for the orientation of 0° (vertical inclusion). On the other hand, Allison and
71 Pandkar⁴² evaluated the RCF limit of longitudinal and lateral inclusions using the maximum
72 orthogonal shear stress beneath the surface calculated by FE analysis, and concluded that the effects
73 of the inclusion orientation and geometry on the RCF limit were minor.

74 Another subject concerning RCF is the failure probability, because the basic rating life of bearings,
75 L10 life, is defined as the RCF life where 90% of specimens fail under identical loading and
76 lubrication conditions. Using the orthogonal shear stress calculated by FE analysis and using the *S-N*
77 curve obtained by the conventional fatigue test, the various research groups evaluated fracture
78 probability in RCF, where the scatter of RCF life values attributed to the scatter in the conventional
79 fatigue test⁴³⁻⁴⁶ or crystalline anisotropy.⁴⁷ Kerrigan et al.²⁷ and Unigame²⁸ reported that the inclusion
80 distribution obtained from the statistics of extreme values can be used to predict L10 life.

81 Since the phenomena causing RCF have been considered to occur beneath the surface,
82 observations have been conducted destructively by cutting specimens. Thus, successive observations
83 of RCF have not been conducted. Naeimi et al.⁴⁸ and Jessop et al.⁴⁹ observed macro RCF-cracks
84 formed in rails using an industrial computed tomography (CT) scanner with a resolution of around 1
85 mm; however, this resolution is not sufficient for observing microcracks. On the other hand, 3D
86 imaging of materials with submicron resolution can be accomplished by using ultra-bright
87 synchrotron radiation X-rays, called SR- μ CT. By SR- μ CT imaging, we successfully observed the
88 shape and propagation behavior of fatigue cracks.^{38,50-52} Microstructural alterations related to fatigue
89 crack initiation were also observed by diffraction contrast tomography (DCT) using ultrabright
90 synchrotron radiation X-rays.^{53,54} SR- μ CT has been applied to the observation of the RCF process;
91 however, the penetration depth of ultrabright synchrotron radiation X-rays is limited, so the sample
92 size should be less than 1 mm in all directions. Then samples should be cut from a bulk specimen to
93 include damaged areas. Stiénon et al. calculated the stress field around nonmetallic inclusions in
94 bearing steels in RCF tests using three-dimensional (3D) shapes obtained using SR- μ CT at the
95 European Synchrotron Radiation Facility (ESRF).^{33,34} The authors used SR- μ CT at the synchrotron
96 facility SPring-8 (Super Photon ring-8 GeV) to observe specimens exhibiting RCF-induced cracks,
97 and 3D imaging of the damage before flaking. To observe RCF damage before flaking, a circular hole
98 with a diameter of 15, 30, or 50 μ m and a depth of 50 to 200 μ m was formed in the specimen by
99 electrodischarge machining to investigate the effect of the shape of inclusions on crack initiation,
100 where the artificial hole simulates a stringer-type inclusion. Since the use of the artificial hole enabled
101 us to restrict the damaged area, the crack initiation and propagation from the hole before flaking could
102 easily to be observed.²⁴ To observe RCF damage, samples for SR- μ CT were cut out from this
103 specimen. It was found that many horizontal cracks started forming from the hole and were arranged
104 at almost equal distances before flaking. Lateral cracks were also formed; however, it was not clear
105 which was first, horizontal or lateral crack formation.

106 The mechanism of RCF crack initiation and propagation was discussed referring to the results
107 obtained by SR- μ CT and FE analysis.^{24,55-57} The introduction of the circular hole led to higher tensile
108 residual stress than that in the same region without the hole. In the case of a 15- μ m-diameter hole,
109 the RCF life, decreased with increasing hole length. On the other hand, in the case of a hole 50 μ m
110 in diameter, the hole length does not affect RCF life.

111 For successive SR- μ CT imaging of the RCF process, specimens must be sufficiently small to allow
112 the transmission of X-rays. We employed a specimen with a cross-sectional area of 500 μ m \times 500
113 μ m;³⁵ however, the mechanism of RCF in a thin specimen is different from that in a bulk specimen,
114 *i.e.*, the specimen broke without flaking. Therefore, synchrotron radiation computed laminography
115 (SR- μ CL) was employed, which allows the high-resolution, nondestructive imaging of thin plates
116 and hence successive observations of the RCF process leading to flaking with a specimen 1.0 mm
117 thick, 10 mm wide, and 24 mm long including vertical MnS inclusions.³⁵ It was found that lateral
118 cracks started forming from the inclusions first. After the formation of a lateral crack, the horizontal
119 crack was formed from the lateral crack and propagated leading to flaking. To elucidate the effects
120 of the orientation of stringer-type inclusions, RCF tests of a specimen with transverse inclusions were

121 conducted,^{36,37,58} the RCF mechanism was found to be similar to that in a specimen with vertical
122 inclusions.

123 In the present study, RCF tests of specimens with longitudinal inclusions were conducted, and
124 nondestructive successive observations of RCF crack initiation and propagation were accomplished
125 by SR- μ CL for the first time. The results of these tests were compared with those obtained for
126 specimens containing inclusions with transverse and vertical orientation, those published by the
127 authors in previous papers^{36,37,58} to obtain the basic data for designing the optimum shape of
128 inclusions. In these experiments, a model material with large stringer-type MnS inclusions was
129 employed because inclusions in commercial bearing steel are too small to observe by SR- μ CL. Elastic
130 FE analysis was conducted to clarify the differences in the crack initiation mechanism and mechanics
131 in specimens with lateral inclusions, where the lateral inclusions include both transverse and vertical
132 inclusions. The difference in fracture probability depending on inclusion orientation was also
133 discussed. Vertical and transverse inclusions exist in mass-produced thrust and radial bearings,
134 respectively, whereas longitudinal inclusions appear in large wrought bearings.

135 2 EXPERIMENTAL PROCEDURES

136 The material was the same bearing steel (modified JIS SUJ2) as that in a previous study,³⁶ whose
137 chemical composition (in mass %) was as follows: 1.01 C, 0.33 Si, 0.45 Mn, 0.003 P, 0.049 S, and
138 1.50 Cr, with Fe making up the balance. The steel was not a commercial bearing steel, but it was
139 fabricated in our laboratory to intentionally contain a high concentration of sulfur to enable the
140 observation of crack initiation from stringer-type MnS inclusions. The deteriorative effect of MnS
141 inclusion on RCF was reported for steel bearings.^{26,28,59} The steel was forged from an ingot with a
142 diameter of 70 mm, and inclusions had preferential alignment along the forging direction. After the
143 spheroidizing annealing of cementite particles, specimens were cut from the forged bar to obtain the
144 inclusion orientation, as shown in Figure 1. The dimensions of the specimen for SR- μ CL imaging
145 were 10 mm in width, 24 mm in length, and 1 mm in thickness. The thickness of the specimen was
146 determined to allow the transmission of X-rays with sufficient intensity for imaging.³⁶ The specimen

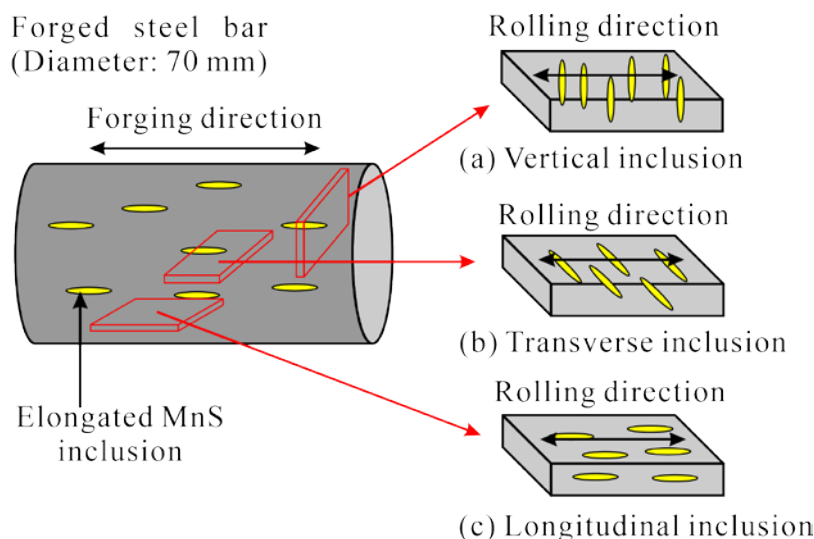


Figure 1 Orientation of inclusions in specimens

147 was quenched at 1103 K for 0.5 h and tempered at 453 K for 2 h. The average dimensions of MnS
 148 inclusions were 28.2 μm in length and 12.0 μm in diameter. Although those are much larger than the
 149 inclusions containing in actual bearings, the flaking mechanism is considered to be similar because
 150 the stress concentration is similar for similar shape inclusions.⁵⁷ Specimens with an artificial hole with
 151 a diameter of 15 μm and a depth of 200 μm , which was introduced by electrodischarge machining
 152 and simulates a vertical inclusion, were employed only for a preliminary test for the comparison of
 153 crack propagation behavior between rotating contact and reciprocal contact; other specimens had no
 154 artificial hole.

155 To conduct the RCF test near the experimental hatch of beam lines of the synchrotron radiation
 156 facility, SPring-8 (Super Photon Ring 8 GeV), a special ball-on-disk RCF testing machine was
 157 developed, as schematically illustrated in Figure 2, in which an eccentric cam converts the rotary
 158 movement of the motor to the reciprocal movement of the linear stage, the vibroconverter detects
 159 flaking of the specimen, and the proximity sensor detects the edge of the linear stage to count the
 160 number of cycles. In contrast to the conventional RCF testing machine in which the specimen rolls
 161 in one direction, our specimen moves reciprocally. Since the distance between the center of rotation
 162 of the motor and the center of the cam was 1.5 mm, the sliding distance of the ball on the specimen
 163 was 3.0 mm. A ceramic ball with a diameter of 6.0 mm and Young's modulus of 300 GPa was
 164 employed, and the specimen was immersed in naphthenic lubricant oil with a kinetic viscosity of 8.46
 165 mm^2/s to eliminate friction force.³⁶ The tests were carried out with reciprocating contact, whereas only
 166 the preliminary test in rotating contact was carried out to compare these two test procedures for specimens
 167 with an artificial hole. In general, bearings are subjected contact stress lower than 2 GPa, the contact
 168 stresses of higher than 5 GPa were also employed for accelerated testing of RCF^{11, 26, 28, 32}, because the
 169 RCF mechanism for the contact stress higher than 5 GPa is considered to be similar with that lower than
 170 2 GPa. In the present paper, results for a maximum Hertz stress, p_{max} , of 5.39 GPa are discussed. Since
 171 only 48 h was allowed for the use of the beam line of the synchrotron radiation facility every six
 172 months, the value of p_{max} was selected such that the RCF life was less than 48 h. RCF tests were

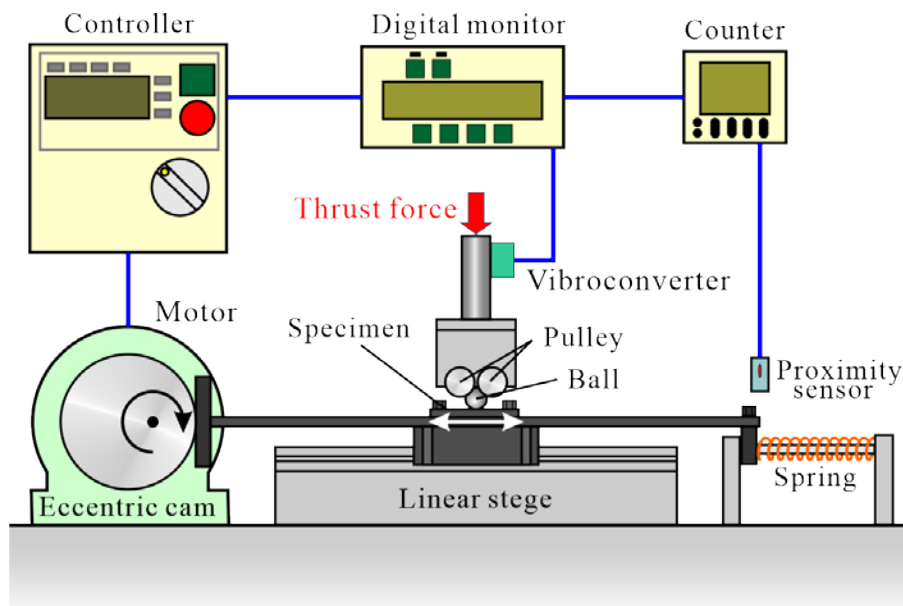


Figure 2 Rolling contact fatigue testing machine for laminography.

173 interrupted to conduct optical microscopy and SR- μ CL imaging to observe the crack initiation and
174 propagation behaviors. SR- μ CL imaging was carried out at an undulator beam line of SPring-8. The
175 experimental setup and the 3D reconstruction procedure are given elsewhere.³⁶

176 3 Experimental Results

177 3.1 Comparison of RCF behaviors between reciprocal and rotating testers

178 Since the rolling direction of bearings is usually only one way but is reciprocal in the present study,
179 the crack propagation behaviors in the two methods are compared. Since the RCF life is probabilistic,
180 depending on the scatter of inclusion size and shape, an artificial hole with a diameter of 15 μ m and
181 depth of 200 μ m was formed in specimens by electrodischarge machining to simulate a vertical
182 inclusion and to reduce the scatter. Figure 3 shows the appearance of the surface around the hole at
183 $N=1.00\times 10^6$ cycles, indicating no significant difference in initial crack morphology. Figure 4 shows
184 the propagation behavior of the crack at the surface, where the results of using reciprocal and rotating
185 testers were obtained on two and three specimens, respectively. No significant difference was
186 observed in the crack propagation behavior and RCF life, although the flaking occurred as a result of

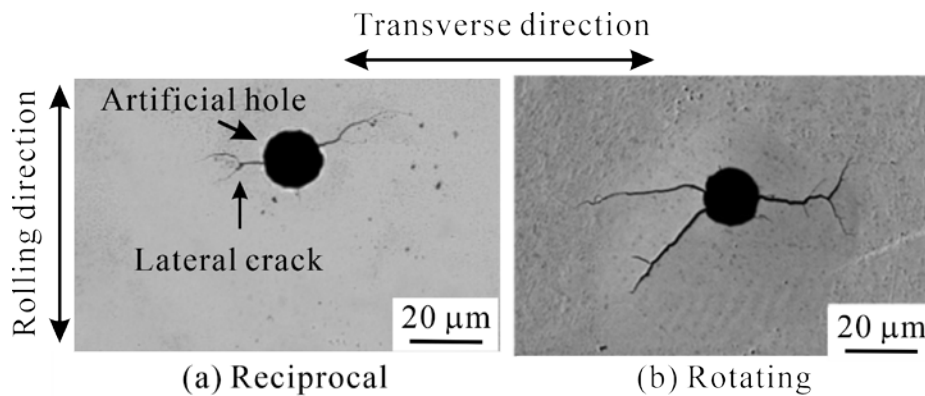


Figure 3 Lateral cracks emanating from artificial hole simulating vertical inclusion at $N = 1.00\times 10^6$ cycles.

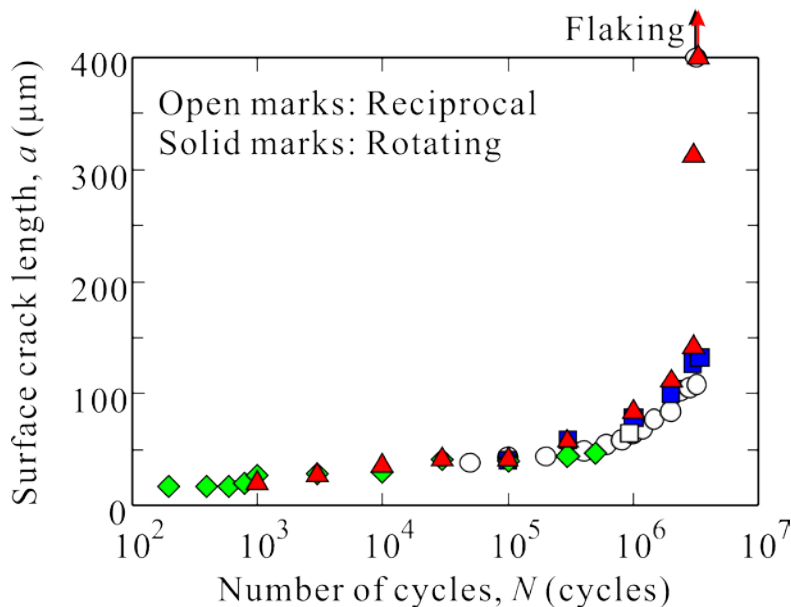


Figure 4 Propagation behavior of lateral cracks emanating from artificial hole.

187 the propagation of the horizontal crack beneath the surface, which was not observed from the surface.
 188 Therefore, the propagation behavior of the horizontal crack must also be similar for the two cases.

189 Since the morphology of lateral cracks emanating from inclusions are similar between vertical and
 190 transverse inclusions, the propagation behavior and RCF life in reciprocal and rotating RCF tests are
 191 considered to be similar.³⁷ They must also be similar for cracks in specimens with longitudinal
 192 inclusions because they are determined by the stress field far from the inclusions.

193 **3.2 Optical microscopy at surface**

194 Even though inclusions also exist beneath the surface, laminographies described in 3.3 showed
 195 that RCF cracks always first start forming from inclusions at the surface. Then, the crack initiation
 196 and propagation behaviors at the same site of the specimen surface were observed successively by
 197 optical microscopy; the results are shown in Figures 5 (Case I) and 6 (Case II). Longitudinal cracks
 198 started forming at the longitudinal ends of MnS inclusions, where the stress concentration is the
 199 highest, and propagated toward the rolling direction. Cracks have never been seen to form from other
 200 types of inclusion such as Al₂O₃ and TiN because the concentrations of these compounds are below
 201 the detection limit and the size of such inclusions are smaller than that of MnS inclusions.

202 As shown in Figure 5 (e), one tip of a longitudinal crack kinked to form a lateral crack when its
 203 length reached 90 μm. Figure 6 (d) indicates that both tips of the longitudinal crack kinked when the
 204 length of the longitudinal crack reached 129 μm, indicating that the kinking occurred almost
 205 simultaneously at both tips, except in the case shown in Figure 5 (e). Therefore, the kinking occurred
 206 when the length of the longitudinal crack reached approximately 100 μm regardless of the size of the
 207 inclusions where longitudinal cracks started to form. After the kinking, the lateral crack propagated

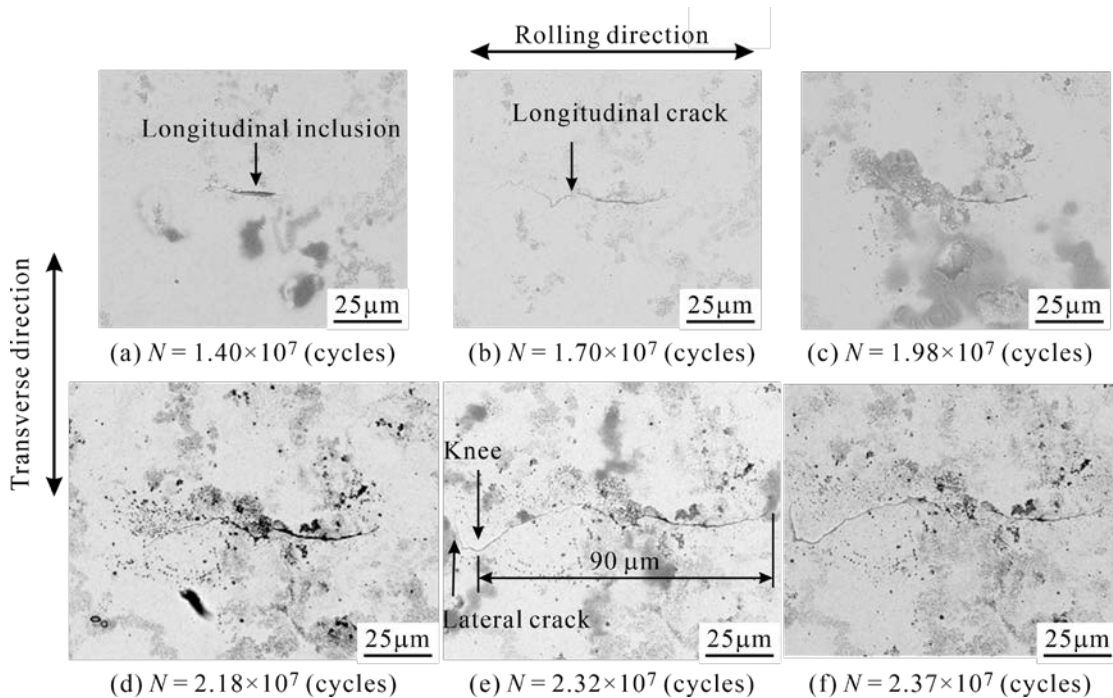


Figure 5 Crack initiation and propagation at surface observed by optical microscopy (Case I).

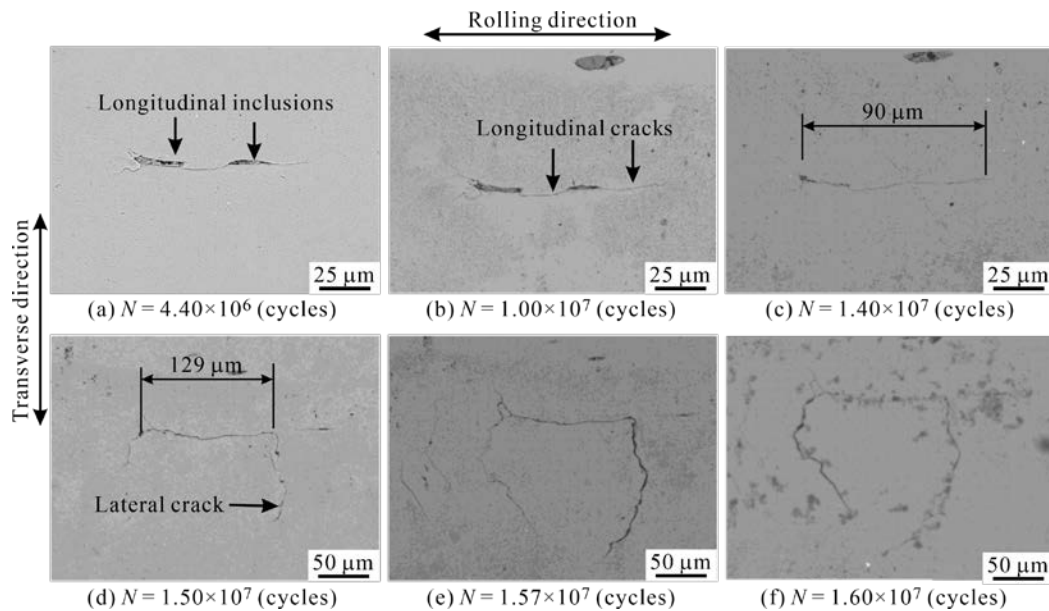


Figure 6 Crack initiation and propagation at surface observed by optical microscopy (Case II).

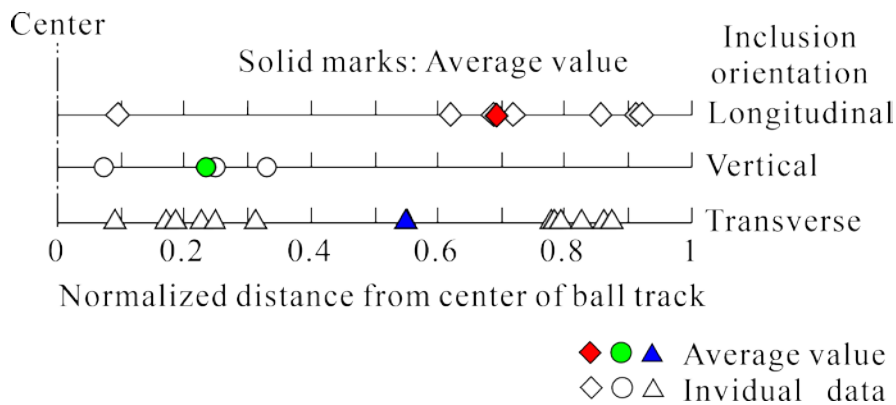


Figure 7 Distance between crack initiation site and center line of ball track, where distance was normalized by ball track width.

208 toward the transverse direction without the propagation of longitudinal cracks towards the rolling
 209 direction.

210 Figure 7 shows the crack initiation site in the ball track, where the distance along the transverse
 211 direction from the center of the ball track is normalized by half the ball track width. These values are
 212 the site for the initiation of the longitudinal crack for specimens with longitudinal inclusions, and the
 213 site for the formation of the lateral crack for specimens with transverse and vertical inclusions.
 214 Although the scatter is large, the average distance of the crack initiation site of specimens with
 215 longitudinal inclusions is close to the edge of the ball track, and close to the center line of ball track
 216 for specimen with vertical inclusions.

217 3.3 Laminography

218 3D SR- μ CL images of inclusions and cracks are shown from Figures 8 to 10, where (A) and (B)
 219 are the top and side views, respectively. In these images, dissimilar objects were indicated by colors
 220 depending on their depth from the surface; however, cracks and inclusions cannot be distinguished
 221 automatically in each SR- μ CT imaging process. Then, inclusions were identified as objects that did

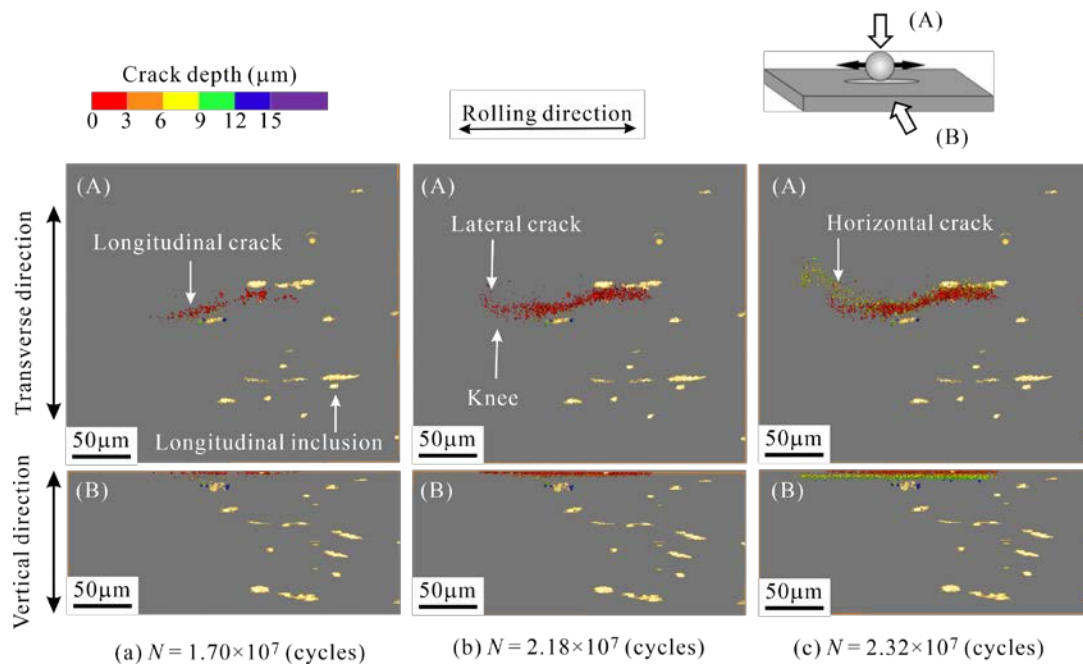


Figure 8 Laminography showing crack initiation from inclusion and propagation in sample with longitudinal inclusion, where color code indicates distance from sample surface (Case I). Upper and lower figures show views from upper and side, respectively.

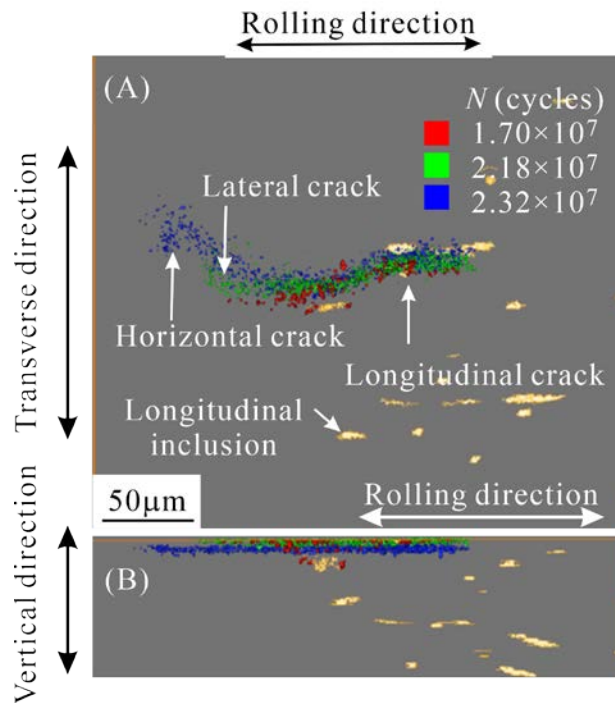


Figure 9 Laminography showing crack initiation from inclusion and propagation in sample with longitudinal inclusion, where color code indicates number of cycles at each observation (Case I). Upper and lower figures show views from upper and side, respectively.

222 not change their shape or size in every observation, and they are indicated in pale yellow in the figures
 223 regardless of their location. However, the locations of inclusions changed after flaking because of the
 224 large plastic deformation of the specimen. Inclusions and cracks could not be distinguished, and both
 225 are indicated in color depending on their depth in Figure 10 (c).

226 Figure 8 (Case I) was obtained from the same specimen as that shown in Figure 5, where (a), (b),
 227 and (c) correspond to the optical micrographs in Figures 5 (b), (d), and (e), respectively. The kinking

228 of the longitudinal crack can be recognized in Figure 8 (b), although it was not observed in the optical
 229 micrograph obtained at the same number of cycles (2.18×10^7 cycles) as shown in Figure 5 (d). Figure
 230 8 (c) indicates that the horizontal crack formed from the bottom of the lateral crack. Figure 9 shows
 231 the same crack (Case I), where each color indicates images obtained at each number of cycles. The
 232 formation sequence of the longitudinal, lateral, and horizontal cracks is clearly shown in this figure.

233 Another example of the flaking process is shown in Figure 10 (Case III), where two cracks are
 234 recognized, named Crack 1 and Crack 2. As shown in Figure 10 (a), the horizontal crack was already
 235 formed at the bottom of the lateral crack at the time of the first observation of Crack 1. After that, the
 236 horizontal crack propagated in both the rolling and transverse directions, as shown in Figure 10 (b),
 237 and further propagated to cause flaking, as shown in Figure 10 (c), where white arrows shown in (b)
 238 and (c) indicate the same position. The other crack, Crack 2, was also formed along an inclusion, but
 239 it remained a longitudinal crack.

240 4 Discussion

241 4.1 Flaking process

242 The following flaking process for specimens with a lateral inclusion was reported in our previous
 243 paper.³⁷ (1) A lateral crack is formed from an inclusion. (2) The crack propagates toward the lateral
 244 direction. (3) After the lateral crack propagates to a critical depth, a horizontal crack is formed from
 245 the lateral cracks. (4) The horizontal crack propagates under the surface to cause flaking. As described
 246 in the previous section, the flaking process for specimens with longitudinal inclusions was different.
 247 In this specimen, a longitudinal crack is formed first and propagates until it reaches a critical length.
 248 After the formation of the lateral crack, the RCF process for the specimen with longitudinal inclusions
 249 is similar to that of specimens with lateral inclusions. The formation of a longitudinal crack is an
 250 additional process for specimens with longitudinal inclusions. These processes are different from that
 251 previously proposed, in which the flaking starts from inclusions beneath the surface where the ball

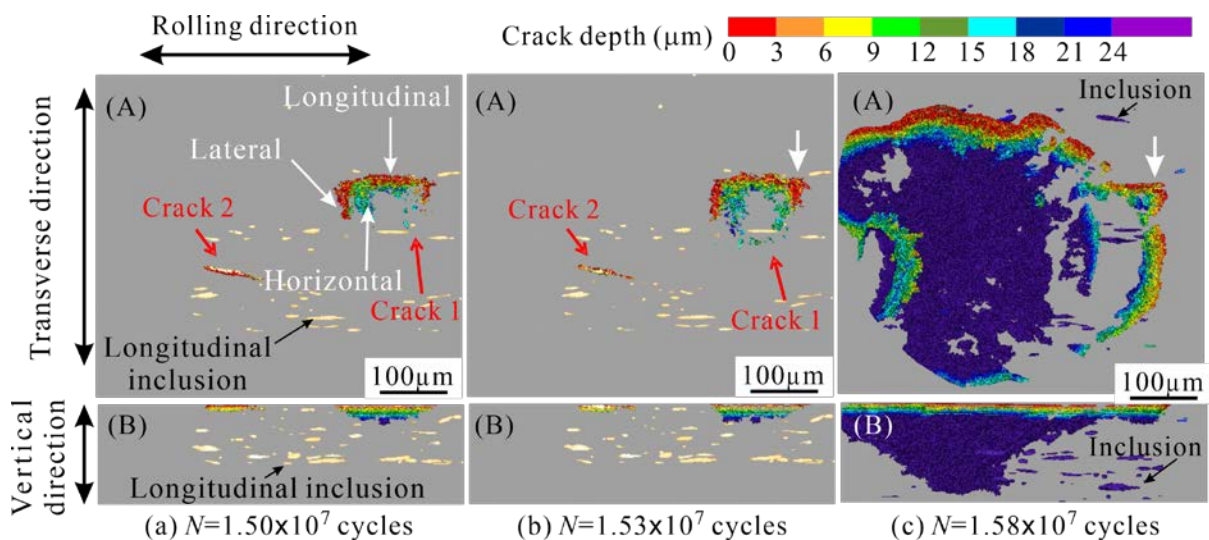


Figure 10 Laminography showing crack initiation from inclusion and propagation in sample with longitudinal inclusion, where color code indicates distance from sample surface (Case III). Upper and lower figures show views from upper and side, respectively.

252 track is located and the orthogonal shear stress is greatest, and the cracks grow from them to the
253 surface.^{39,40}

254 For specimens with longitudinal inclusions, the number of cycles of longitudinal crack initiation
255 was between 1.40×10^7 and 1.70×10^7 for Case I (Figure 5) and between 4.40×10^6 and 1.00×10^7 for
256 Case II (Figure 6). The number of cycles of lateral crack initiation was between 1.98×10^7 and
257 2.18×10^7 for Case I (Figures 5 and 8) and between 1.40×10^7 and 1.50×10^7 for Case II (Figure 6).
258 The number of cycles for crack initiation and flaking of the specimens will be described in 4.3.

259 4.2 Stress analysis

260 Since the effect of inclusion orientation on the RCF process is controlled by the stress field of
261 matrix at the location of inclusions,^{5,42} and it can be approximated by that of an isolated inclusion in
262 the matrix when the volume fraction of inclusions is low. The stress field of a homogeneous material
263 induced by the contact with a spherical ball is axisymmetric about the normal of the contact surface,
264 passing through the center of the contact ball. Under such an axisymmetric stress field, inclusions
265 located at the same distance from the axis of symmetry and oriented to the same angle relative to the
266 radial direction, are subjected to similar stress defined by the polar coordinate system. Consider two
267 sites as inclusion locations, Points A and B, whose distance from the axis of symmetry is the same,
268 as shown in Figure 11. The stress field defined by the polar coordinate system is similar between
269 Points A and B. When the specimen moves along the x -axis (rolling direction), a stringer-type
270 inclusion at Point A, whose longitudinal direction is perpendicular to the x -axis, is a transverse
271 inclusion, whereas a stringer-type inclusion at Point B, whose longitudinal direction is parallel to the
272 x -axis, is a longitudinal inclusion. For an inclusion at Point A (transverse inclusion), the change in
273 the stress components with the movement of the specimen toward the rolling direction is equivalent
274 to their change along the x -axis, whereas for the inclusion at Point B (longitudinal inclusion), their
275 change is along the x' -axis, which is parallel to the x -axis.

276 When the transverse inclusion moves from Point A to C, all stress components defined by the polar
277 coordinate system fixed to the ball are similar, whereas the antiplane shear stress component defined

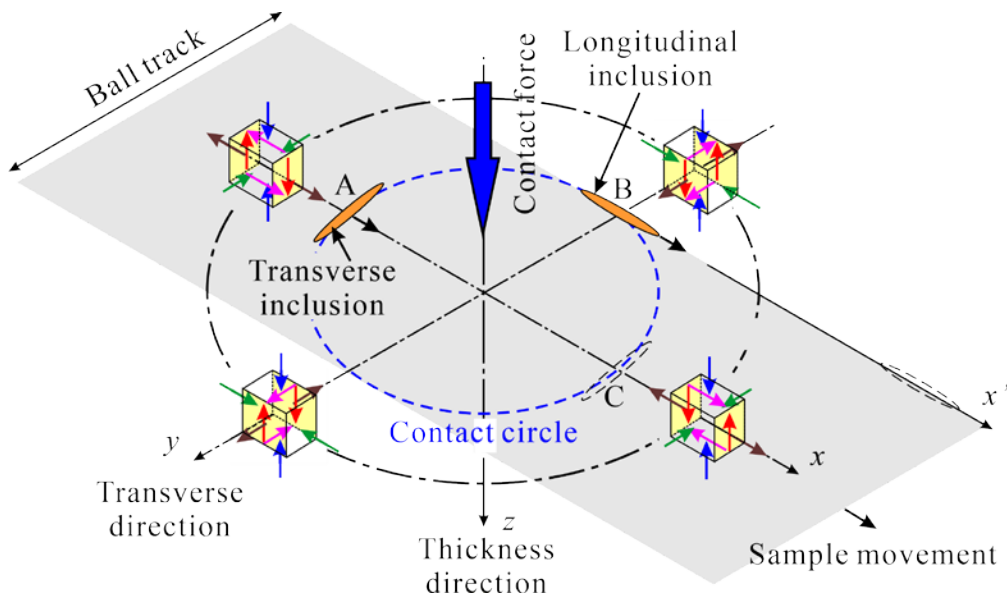


Figure 11 Schematic illustration of axisymmetric stress field due to contact force.

278 by the Cartesian coordinate system fixed to the specimen acts in opposite directions. Stress
279 components fixed to the specimen, except the antiplane shear stress, are similar at Points A and B,
280 indicating that the antiplane shear stress is alternating and other stress components are pulsating
281 during one pass of the contact ball. For the transverse inclusion located at Point B, each stress
282 component fixed to the specimen, including antiplane shear stress, are pulsating and take maximum
283 values at Point B in each pass of the contact ball. Therefore, the amplitude of the antiplane shear
284 stress acting on the transverse inclusion is twice that acting on the longitudinal inclusion, whereas the
285 amplitudes of other stress components are pulsating either for transverse and longitudinal inclusion.
286 The antiplane shear stress acting on a longitudinal inclusion at Point A is also alternating; however,
287 the stress concentration of this inclusion is significantly smaller than that of a longitudinal inclusion
288 at Point B. The stress concentration of a longitudinal inclusion at Point B is the same as that of a
289 transverse inclusion at Point A. Then, the difference in crack initiation behaviors between transverse
290 and longitudinal inclusions can be explained by the difference in the amplitude of antiplane shear
291 stress acting on these inclusions. In the case of a vertical inclusions at Point A, the stress is alternating,
292 whereas that is pulsating at Point B. Therefore, cracks start formation at Point A.

293 To confirm the above idea and the change in the antiplane shear stress due to the contact force, FE
294 analysis was conducted for the matrix, and the stress components defined by the Cartesian coordinate
295 system were calculated. ABAQUS Ver. 6.12 was used for the FE analysis. Although the elastic–
296 plastic analysis is required for a precise analysis, the 3D elastic FE analysis was conducted because
297 Makino et al. found through elastic–plastic FE analysis of RCF for specimens with artificial hole
298 which simulate the vertical inclusion, that plastic strain appears only during the initial few cycles
299 because of elastic shakedown.⁵⁵ They also showed that the shape of the stress distribution is almost
300 independent of the length of the hole, and is almost the same as that without a hole, while the peak
301 stresses depend on the length of the hole. The difference in peak stress for transverse and lateral
302 inclusions at the contact circle must be the same because they are mechanically equivalent under
303 axisymmetric loading.

304 The FE model consisted of a rectangular block and a hemisphere, and symmetry was considered
305 in the analysis.²⁴ The length, width, and height of the blocks were 20 mm, 6 mm, and 6 mm,
306 respectively, where infinite elements as defined in ABAQUS were applied in the region shown in
307 Figure 12. The length, width, and height of the solid element region were 10 mm, 3 mm, and 3 mm,
308 respectively. Therefore, accurate analysis was possible with a small number of elements. The actual
309 number of elements was 118,828 for the rectangular model and 32,914 for the hemispherical model.
310 Hertz stress of 5.22 GPa, Young’s modulus of 205.8 GPa, and Poisson’s ratio of 0.3. The radius of
311 the contact circle was 0.346 mm. In the previous paper employing similar FE analysis,²⁴ the
312 distribution of contact pressure obtained by FE analysis was calculated and compared with the
313 distribution obtained by Hertzian theory. No significant difference was found between them,
314 indicating that the FE model could simulate the contact condition assumed by the Hertzian theory.

315 Since the experimental results show that RCF cracks always start at the surface and the antiplane
316 shear stress is considered to be the driving force of crack initiation, the distribution of the antiplane
317 shear stresses at the surface calculated by the FE analysis is shown in Figure 12, where the antiplane
318 shear stresses τ_{xz} and τ_{yz} act on the plane normal to the rolling direction for specimens with lateral

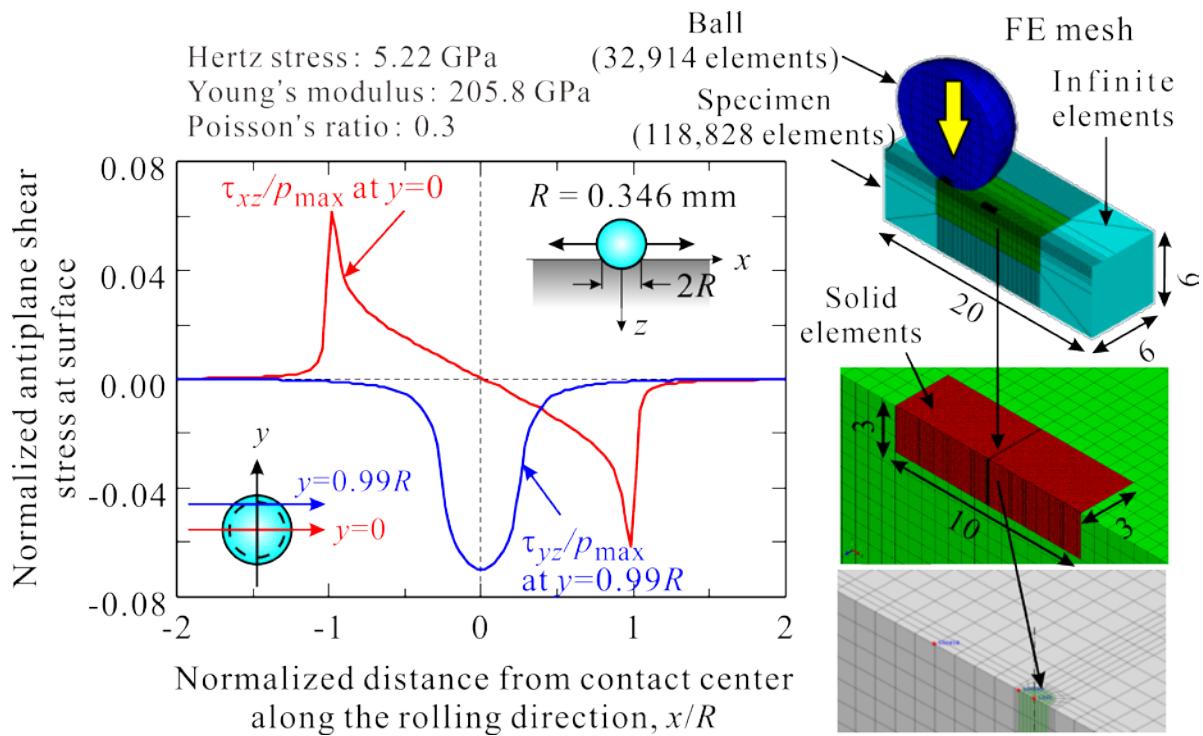


Figure 12 Distribution of antiplane shear stress at surface.

319 (transverse/vertical) inclusions and on the plane normal to the lateral direction for specimen with
 320 longitudinal inclusions, respectively. The distributions of τ_{xz} and τ_{yz} are along the center of the ball
 321 track ($y = 0$) and just inside of the ball track edge ($y = 0.99R$), respectively, where $R (= 0.346$ mm) is
 322 the radius of the contact circle, *i.e.*, the half-width of the ball track. These values are maximum along
 323 the contact circle. Theoretically, the maximum values of τ_{xz} and τ_{yz} should be the same; however, the
 324 calculated $\tau_{xz,\max}$ is slightly smaller than $\tau_{yz,\max}$ because it is truncated owing to the rapid change in
 325 $\tau_{xz,\max}$ along the contact circle, where the calculated shear stresses depend on the mesh size of the FE
 326 analysis. Figure 12 is equivalent to the time variation of the stress components in the Cartesian
 327 coordinate system fixed to an inclusion (in other words, the specimen), where the abscissa axis
 328 represents time. The time variation of stress components during each motion of the specimen indicates
 329 that τ_{xz} is alternating and τ_{yz} is pulsating. These results of the FE analysis confirm that the supposition
 330 that the axisymmetric stress field is due to ball contact is appropriate. Again, this result indicates that
 331 the difference in the crack growth direction between specimens with lateral and longitudinal
 332 inclusions can be explained by considering the movement of inclusions fixed to the specimen, *i.e.*,
 333 the lateral inclusion receives an alternating cyclic stress, whereas the longitudinal inclusion receives
 334 a pulsating stress. Since the maximum stress is the same, the stress amplitude in the case of a
 335 longitudinal inclusion is half that in the case of a lateral inclusion.

336 Because of the stress concentration due to inclusions, RCF cracks start to form at the tips of
 337 inclusions; however, the stress amplitude in specimens with longitudinal inclusions is half that for
 338 specimens with lateral inclusions as mentioned above. This is why the crack initiation life for
 339 specimens with longitudinal inclusions is significantly longer than that for specimens with lateral
 340 inclusions. Owing to the long crack initiation life of specimens with longitudinal inclusions,
 341 inclusions originally located at the surface disappeared because of wear at the ball track. This seldom

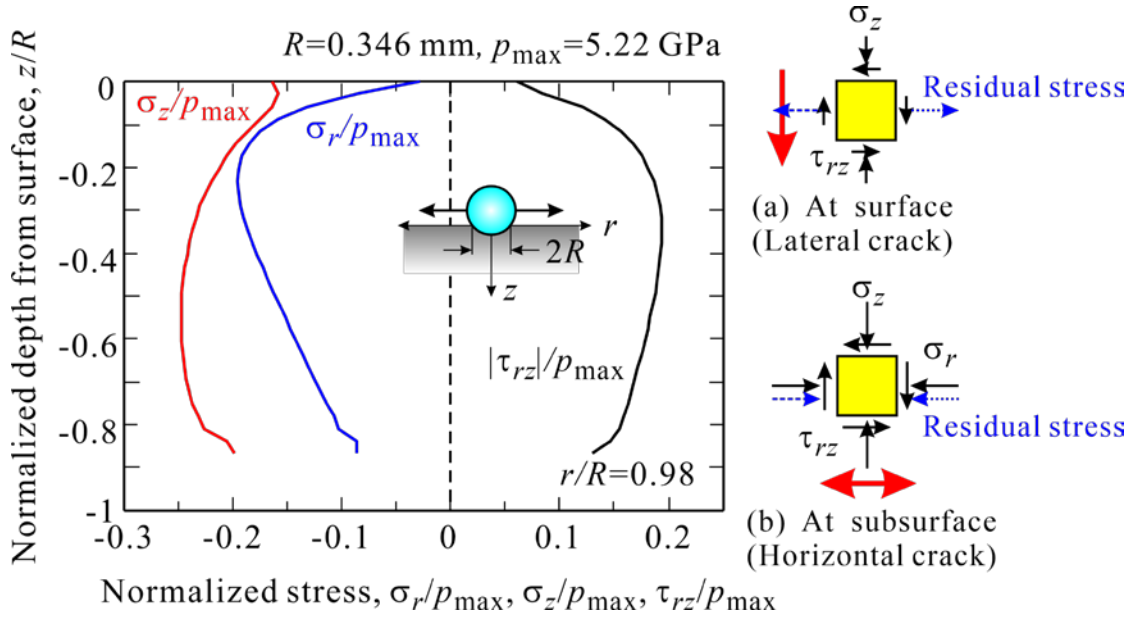


Figure 13 Stress distribution due to contact stress in depth direction.

342 happened with lateral inclusions. Then, inclusions beneath the surface appeared at the new surface,
 343 and cracks started to form from such inclusions. Small stress amplitude and wear synergetically
 344 elongate the crack initiation life of specimens with longitudinal inclusions.

345 Since the antiplane shear stress at the surface is maximum along the contact circle shown in Figure
 346 12, RCF cracks in specimens with lateral inclusions tend to start forming at the center of the ball track,
 347 whereas the initiation site tends to be along the edge of the ball track for specimens with longitudinal
 348 inclusions, where the ball track is an envelope of the contact circle. This is consistent with the
 349 experimental results shown in Figure 7.

350 As shown in Figures 5 and 6, the kinking of the longitudinal crack occurred at almost the same
 351 crack length under comparable Hertz stress, and the kinking occurred almost simultaneously at both
 352 tips of a longitudinal crack, indicating that kinking is governed by the critical value of a mechanical
 353 factor such as the stress intensity factor, not a microstructural or metallurgical factor.

354 Contrary to the previously proposed mechanism that flaking starts from inclusions beneath the
 355 surface^{39,40}, the present experimental results showed that the horizontal crack formed after the
 356 formation of a lateral crack started forming at the surface. Therefore, the mechanics of flaking should
 357 be reconsidered. It has been believed that crack initiation is controlled by the orthogonal shear stress
 358 acting on the plane parallel to the surface and that the initiation and propagation of a horizontal crack
 359 causes flaking; however, the shear stress has a conjugate component, acting on the plane
 360 perpendicular to the surface. Indeed, results of laminography indicate that the existence of a lateral
 361 crack triggered the formation of a horizontal crack. As long as the orthogonal shear stress is the
 362 driving force of lateral crack formation and propagation, the normal stress acting on the plane where
 363 the orthogonal shear stress acts must govern the crack propagation plane. The normal stress acting on
 364 the plane perpendicular to the surface is the radial stress, σ_r , which is σ_x for the lateral crack started
 365 to form from a lateral inclusion, σ_y for the longitudinal crack started to form from a longitudinal
 366 inclusion, and σ_z acting on the face of the horizontal crack for specimens with each type of inclusion.

367 To examine the normal stress, the distribution of these stress components in the depth direction at
 368 the edge of the contact circle is calculated by FE analysis and shown in Figure 13. Since, the location
 369 of the transition from lateral to horizontal cracks is independent of the existence of inclusions, 3D FE
 370 analysis for the matrix was conducted. Figure 13 indicates that σ_r vanishes at the surface, but σ_z
 371 is compressive everywhere. According to the results of the elastic–plastic FE analysis conducted by
 372 Makino et al.,⁵⁵ the rolling-contact-induced residual stress in the radial direction is tensile at the
 373 surface, decreases in the depth direction, and changes to compressive some distance below the surface.
 374 Since the compressive stress acting on the crack face has a negative effect on crack propagation
 375 because of the friction acting on the crack plane, lateral crack initiation prevails over horizontal crack
 376 initiation near the surface; however, the antiplane shear stress decreases and the compressive residual
 377 stress acting on the plane increases with crack extension toward the depth direction. On the other
 378 hand, the conjugate shear stress and normal stress acting on the face of the horizontal crack is
 379 unchanged with crack extension as long as the horizontal crack propagates at the same depth.
 380 Therefore, near the surface, the lateral crack prevails over the horizontal crack, whereas the horizontal
 381 crack prevails some distance beneath the surface.

382 The authors have analyzed lateral and horizontal crack propagation behavior based on the fracture
 383 mechanics of an artificial hole.⁵⁵ Similar analysis must be better for more quantitative analysis;
 384 however, present analysis could confirm the stress analysis based on the axisymmetric stress field
 385 equivalent to Hertzian theory, and could explain the effect of inclusion orientation.

386 4.3 RCF life

387 Weibull plots of the RCF life are shown in Figure 14, and three-parameters in the Weibull plot and
 388 the average RCF life for each inclusion orientation are shown in Table 1. The smaller the shape

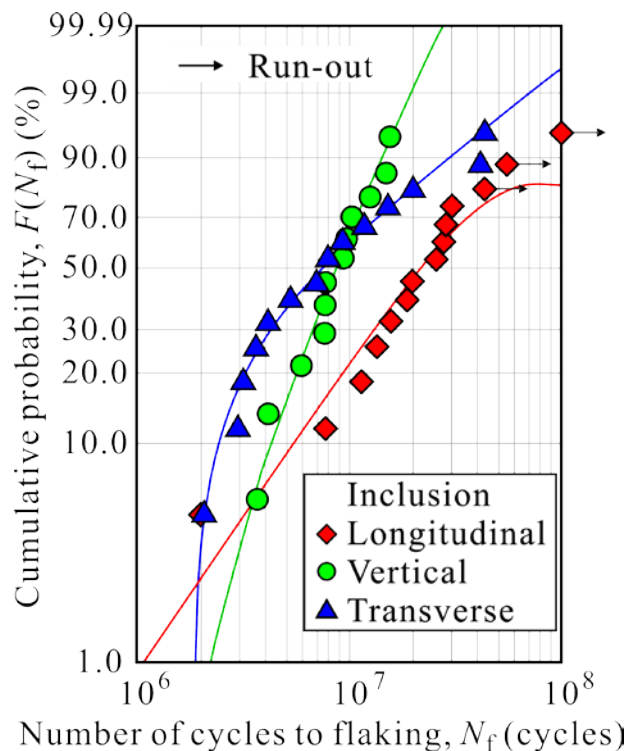


Figure 14 Weibull plot of rolling contact fatigue life.

Table 1 Effect of inclusion orientation on parameters in Weibull plot and average RCF life.

Inclusion orientation	Correlation	Number of samples, n	Shape parameter, α	Scale parameter, β	Location parameter, γ	Average RCF life (50 % fracture) (cycles)
Longitudinal	0.958	14	1.44	2.26×10^7	1.99×10^3	1.75×10^7
Vertical	0.984	12	2.08	8.95×10^6	1.23×10^6	8.74×10^6
Transverse	0.989	14	0.761	9.49×10^6	1.90×10^6	7.76×10^6

389 parameter, the more spread out the distribution,⁶⁰ and it is smallest for the specimen with vertical
 390 inclusions, indicating that the scatter of the diameter of inclusions is smaller than that of the length
 391 of inclusions because the RCF life is affected by the shape and size of the inclusion.

392 The average RCF life is almost the same for specimens with vertical and transverse inclusions. In
 393 contrast, Alley et al.⁴¹ estimated the effect of the orientation of the lateral inclusion on the RCF life,
 394 and concluded that the strength of the specimen with transverse inclusions is higher than that of the
 395 specimen with vertical inclusions due to the difference in stress concentration. Allison and Pandkar⁴²
 396 concluded that the RCF life of a specimen with longitudinal inclusions is almost the same as that of
 397 a specimen with transverse inclusions. Actually, the RCF life of a specimen with transverse inclusions
 398 is longer than that of a specimen with vertical inclusions in the long-life region ($F > 50\%$).
 399 Conversely, the former is shorter than the latter in the short-life region ($F < 50\%$). The RCF life of a
 400 specimen with longitudinal inclusions is always longer than that of a specimen with the lateral
 401 inclusions, indicating that the results of the FE analysis without considering the actual mechanism do
 402 not provide an accurate estimation.

403 Figure 15 shows plots of the lateral crack length, a , measured at the specimen surface against the
 404 number of cycles after crack initiation, $N - N_i$, where N_i is the lateral crack initiation life for specimens
 405 with the lateral inclusion and the longitudinal crack initiation life for specimens with the longitudinal

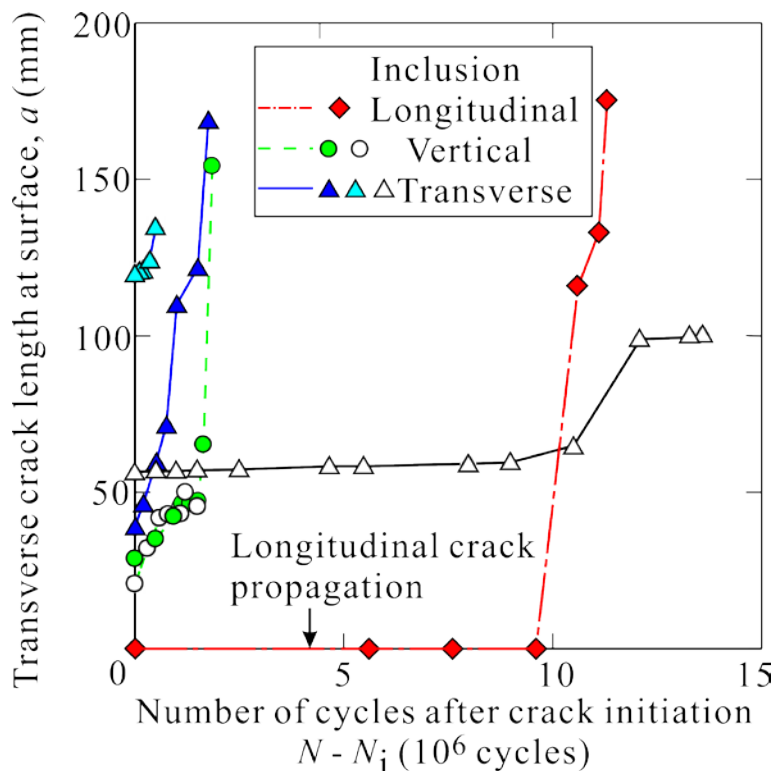


Figure 15 L-type crack propagation behavior observed at surface of specimen.

406 inclusion. Except data indicated by open triangles, for which flaking did not occur, the lateral crack
407 propagation behaviors in specimens with longitudinal inclusions are similar to those in specimens
408 with lateral inclusions.

409 To determine which process described in 4.1 is responsible for the difference in RCF life, the crack
410 propagation life for each process was examined and shown in Figure 16, which shows the crack type
411 observed at each number of cycles up to flaking. Except for one crack in a specimen with transverse
412 inclusions that did not lead to flaking, the propagation lives of the lateral crack and the horizontal
413 crack were similar for all types of specimen because cracks propagate far away from the initial
414 inclusions. Therefore, the difference in RCF life depending on the orientation of inclusions should be
415 attributed to the difference in the lateral crack initiation life. Therefore, the main difference in the
416 RCF life for specimens with longitudinal inclusions compared with other specimens must originate
417 from the longitudinal crack initiation and the propagation in the rolling direction.

418 **5 CONCLUSIONS**

419 In the present study, successive nondestructive 4D (3D imaging + time) observations of the
420 formation and propagation of cracks in rolling contact fatigue (RCF) were performed on high-strength
421 steel by synchrotron radiation computed laminography (SR- μ CL), and the crack path under RCF was
422 discussed for specimens with stringer-type MnS inclusions elongated toward the rolling direction
423 (longitudinal intrusion). The present results and those of previous RCF tests on specimens containing
424 lateral (*i.e.*, transverse and vertical) inclusions were also compared. The following results were
425 obtained.

- 426 1. Surface observation of the RCF process by optical microscopy showed that cracks were started
427 forming from longitudinal inclusions. After propagation toward the rolling direction, the crack
428 became kinked simultaneously at both tips of the longitudinal crack at the surface, and propagated
429 toward the direction perpendicular to the rolling direction. The crack length at the time of kinking
430 (the distance between knees $\approx 100 \mu\text{m}$) was almost independent of the length of the starter inclusion
431 under comparable contact stress, indicating that the condition of kinking is determined by a
432 mechanical factor.
- 433 2. Laminography of the RCF process showed that faces of cracks observed from the surface were
434 vertical to the surface. After cracks reached a critical depth ($\approx 10 \mu\text{m}$), horizontal cracks were
435 formed from the deepest point of the lateral crack, leading to flaking. The critical distance is
436 thought to depend on the contact stress.
- 437 3. The formation of the longitudinal crack was the main difference in the RCF process of specimens
438 with longitudinal inclusions, compared with that of specimens with lateral inclusions.
439 Consequently, the RCF life of specimens with longitudinal inclusions was twice that of specimens
440 with lateral inclusions. Not only mechanical factors but also wear is important in longitudinal crack
441 initiation from longitudinal inclusions.
- 442 4. The effect of inclusion orientation on the crack path in RCF behavior could be explained in terms
443 of antiplane shear stress acting on inclusions. Longitudinal inclusions received pulsated cyclic

444 stress, whereas the lateral inclusions received alternating cyclic stress. The antiplane shear stress
445 amplitude of the former was half that of the latter. The formation of the horizontal crack was
446 determined by the normal stress that acts on the orthogonal shear stress.

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452 **CONFLICT OF INTEREST**

453 The authors declare that they have no conflict of interest.

454 **AUTHOR CONTRIBUTIONS**

455 Y. Nakai, D. Shiozawa, S. Kikuchi, T. Makino, and Y. Neishi conceived of the presented idea. T.
456 Makino and Y. Neishi contributed to sample preparation. H. Saito, T. Nishina, and H. Kobayashi
457 carried out the experiment. T. Makino performed the FE analysis. All authors contributed to the
458 interpretation of the results. Y. Nakai, D. Shiozawa, S. Kikuchi, T. Makino, and Y. Neishi contributed
459 to the final manuscript.

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