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Understanding and overcoming the barriers to structural steel reuse, a UK perspective

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Abstract: To meet greenhouse gas emission targets, at global, national and sector level, reduction opportunities should be explored in both the embodied and operational carbon of the built environment. One underexploited option to reduce embodied carbon is the reuse of structural steel. However, in the UK, work by Sansom and Avery (2014) suggests a picture of declining levels of reuse. This paper explores why this is the case by identifying the practical barriers to structural steel reuse through a series of semi-structured interviews with UK construction industry members. Whilst there were many identified barriers, five practical barriers were prioritised as being most significant: cost, availability/storage, no client demand, traceability and supply chain gaps/lack of integration. These contrast with those most commonly identified in literature: cost, supply chain gaps/integration, risk, jointing technique, composite construction and time for deconstruction. Only two theoretical and practical barriers overlap. Many of the barriers from literature have a technical focus (reducing salvage yield rather than completely preventing reuse) differing from the largely systemic barriers that the interviews prioritised. These systemic barriers will need to be dealt with first to increase reuse rates. This will require a coordinated approach across the construction supply chain. Building on interview insights, this paper proposes four mechanisms to overcome these practical barriers: (1) the creation of a database of suppliers/reused section availability, (2) a demonstration of client demand (3) technical guidance and education for the construction industry and (4) government leadership. Together these mechanisms would improve reuse rates in the UK, reduce the embodied emissions of the built environment and play a crucial role in meeting greenhouse gas emissions reduction targets.

Keywords: Steel reuse, embodied carbon, barriers, circular economy, construction; sustainability

1 Introduction: the importance of embodied emissions reduction

Substantial changes are required across the construction sector, a significant user of energy and energy intensive materials, if the UK is to meet its greenhouse gas (GHG) emissions reduction target of 80% below 1990 levels by 2050 (Climate Change Act 2008). This is recognised by the sector, whose Construction 2025 aims include a 50% GHG reduction, relative to 1990 levels, in the built environment by 2025 (HM Government, 2013). There is no restriction on when in the life cycle this reduction could occur, although the focus has traditionally been on buildings in-use. However, embodied emissions (those produced from the extraction, processing, manufacturing, transport of materials and construction of the built environment) are also significant, with Giesekam et al. (2014) estimating these at 63 MtCO_{2e} in 2007 for the UK built environment. This amounts to 9.5% of the UK's 2007 reported domestically produced emissions of 666.1 MtCO_{2e} emissions (Webb et al, 2014); or 5.78% of the UK's reported consumption emissions (DEFRA, 2015). Giesekam et al. (2014) also show that, on average, almost half of the embodied built environment emissions occur outside UK borders, so will not be accounted in the UK's domestically produced emissions, only in the consumption based emissions. There has been some recognition of the importance of embodied (or capital) carbon reduction, the Green Construction Board (2013) Low Carbon Route-Map for the Built

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Environment suggests a 21% reduction, relative to 2010 emissions by 2022, increasing to a cumulative 39% reduction on 2010 levels by 2050 in order to meet the UK's 80% reduction target. A benefit of targeting embodied emissions is the immediate greenhouse gas saving, rather than savings that accrue during building use. With the urgency of the climate change challenge, a greater emphasis on embodied emissions would thus make strategic sense.

Material efficiency (which entails using less material, for longer, while delivering the same function) is a promising option for reducing embodied carbon in the built environment, as suggested by Allwood et al. (2012). The biggest emission reduction opportunities will likely be those focusing on energy intensive, bulk materials; such as steel and cement in the built environment. Globally, in 2008, 56% of steel (Allwood et al., 2012) and almost 100% of cement were used in the built environment, generating 3.2 GTCO₂.

One strategy to increase the whole life material efficiency of a structure is to increase material reuse. This enables subsequent uses of material across multiple buildings, with minimal re-processing. Steel in particular lends itself to this approach, as a quick initial review can be conducted to identify deflections, distortions and corrosion, to therefore ascertain potential suitability of reuse before demolition. However, steel reuse is not common practice in the UK, as shown by Sansom & Avery (2014); suggesting there are few drivers for reuse or that there are barriers along the supply chain preventing reuse. This paper offers a first exploration into the practical barriers to structural steel reuse that are currently faced by different actors in the UK construction supply chain.

2 Defining steel reuse

Reuse is the subsequent use of an object after its first life. The object may be repurposed, but will only have undergone minor alterations, retaining a similar (or the same) form. As a consequence, the re-occurring embodied carbon is minimal. For steel, the key distinction is that it is not re-melted, as in the case of recycling, which is the normal energy intensive end of life scenario. Table 1 characterises different types of reuse, distinguishing between in-situ reuse (on the same site) and relocated reuse (moved to another site), for whole buildings, component systems and individual elements. This framework is useful for categorising reuse case studies and for identifying common and differing barriers and drivers. In practice, the technical feasibility, environmental impacts and financial costs of each option should be assessed to ascertain the preferred strategy.

| | In-Situ Reuse | Relocated Reuse |
|-------------------------------|---|---|
| Building Reuse | Reuse of a significant portion of a building, e.g. entire structural frame, façade or envelope, in-situ | Deconstruction, and reassembly on a new site of a building frame/envelope |
| Component system Reuse | Reuse of a small part of a building in-situ, e.g. foundations | Reuse of system of components, e.g. steel truss, on a new site |
| Element Reuse | Deconstruction and reuse of elements in a new configuration | Reuse of individual elements, e.g steel section(s), on different sites |

Table 1: Characterising Variants of Reuse

The type of reuse could be determined early in a project if the building is to be reused on-site, or decided at a later stage, during the tendering for steelwork, if relocated element reuse. Reuse type will also be determined by the design team, the key players of which are shown in Figure 1, with procurement routes. The latter has three possible options: sourcing directly from a demolition contractor, sourcing from a traditional steel stockist or, with the emergence of a new stakeholder, procuring steel from a specialised reused steel stockist. Procuring directly from a demolition

contractor is also a departure from usual practices and relies on the project team being aware of who might have reused steel available.

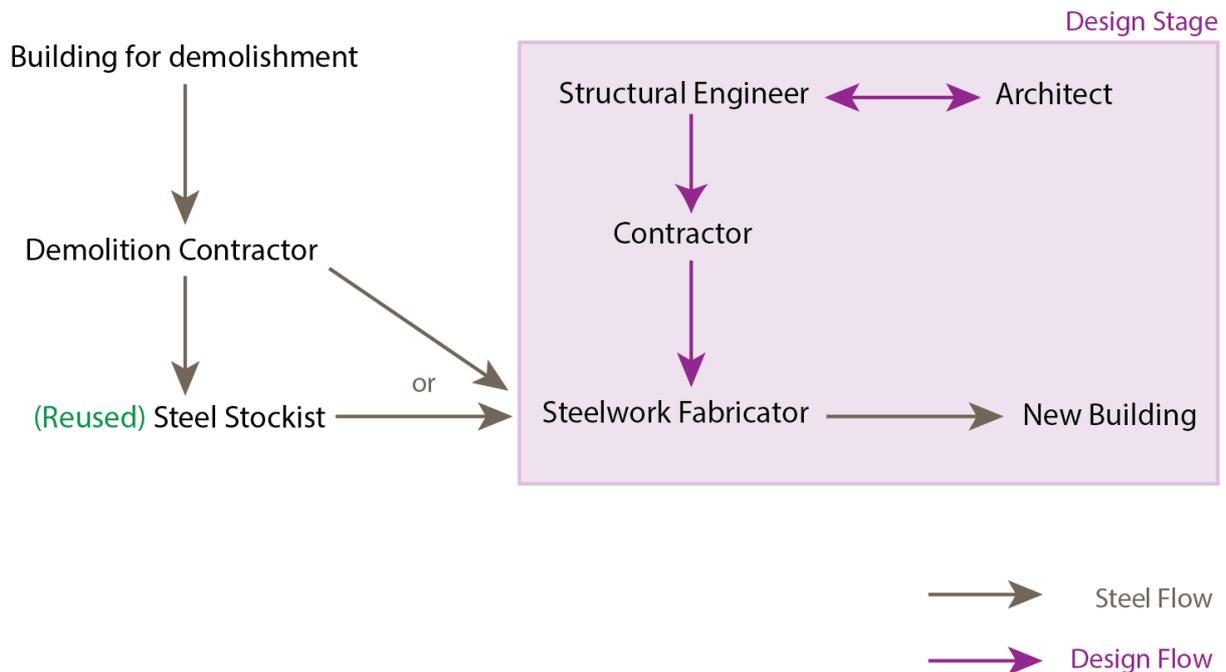


Figure 1: Mapping steel reuse flows for relocated reuse

3 State of the Art

To date, a range of literature has been published on the reuse of steel, including current reuse rates, case studies with assessments of embodied emissions savings, theoretical barriers, and the potential costs or profit opportunity. The subsequent sections highlight and summarise the key literature in this area.

3.1 Reuse rates

Reuse rates of structural steel elements in the UK were investigated by Sansom and Avery (2014). Demolition contractors were surveyed to estimate the percentage of reuse, recycling and waste of steel construction products; estimating that 5% of light structural steel and 7% of heavy structural sections/tubes from demolition sites are reused, both in situ and relocated. Whereas, Sansom and Avery state that a 2000 study showed structural steel having a 12% reuse rate and 10% reuse of secondary structural steel, averaging the figures, this is a 5% fall in structural steel reuse. This type of study is approximate as the extent of the reduction is hard to conclusively document due to different sample sizes and the response rate as a proportion of all UK demolition contractors. Cooper and Allwood (2012) suggest that 50% of cold formed sections could be reused, implying potential for significant growth in reuse rates if barriers to structural steel reuse can be overcome.

3.2 Structural Steel Reuse Case Studies

Gorgolewski et al. (2006) document a series of relocated reuse case studies, predominately in Canada, where individual steel elements and components (roof trusses) had been reused, demonstrating that the barriers to reuse can be overcome in the right market conditions.

Pongiglione and Calderini, (2014) conduct a study to explore the potential material savings by reusing steel in the theoretical development of a train station in Italy. The authors identify that steel could be sourced from a nearby industrial building, suited for deconstruction but unsuitable for renovation. Comparing two designs, one with new steel, and one with a combination of new and reused steel, a 30% saving in use of new steel was identified. This equated to a 30% saving in

embodied energy and carbon, estimated at 2915GJ and 138 TCO_{2e} respectively. Although the latter two estimates are highly dependent on the datasets used, making the material percentage saving of more interest. This study uses a case study approach to demonstrate the potential environmental benefit of reusing steel, but does not explore the practical barriers to achieving these savings.

Ness et al. (2015) outline the potential that new technologies such as radio frequency identification (RFID) and Building Information Modelling (BIM) could play in enabling greater reuse of steel. They argue that improved traceability of steel and the storage of key data over the building lifetime will unlock the residual steel at end-of-life, and estimate that embodied energy savings of 9.98 MJ/kg of steel are possible by reusing rather than recycling, based on a case study of a former manufacturing plant. However, the high costs involved in maintaining a RFID readability or a BIM model over the life of a building, may prevent the uptake of this strategy, given a visual inspection and creation of a deconstruction plan is a potentially low cost option. Akbarnezhad et al. (2014) also highlight the potential role BIM could play in improving future reuse rates.

3.3 Barriers to Reuse

Potential barriers to reuse (as well as design for deconstruction) are documented by Densley Tingley and Davison (2012) who produce a summary of barriers found in a range of engineering, management and architectural literature, including Addis & Schouten (2004), Dolan et al. (1999), Guy and Ciarimboli (unknown date), Hurley et al. (2002), Morgan & Stevenson (2005), Storey & Pederson (2003), and Moore (2010). These papers largely focus on design guidance and in doing so explore barriers to reuse. In total, twenty-four barriers were identified, mostly drawn from a theoretical view of structural steel reuse, with six barriers most commonly recognised, suggesting these may be the most significant barriers. These are as follows: the perceived risk in specifying reused materials; financial constraints - reuse could be more expensive; composite construction; lack of reuse markets/supply chains; time constraints – deconstruction can take longer; the type of jointing used and inaccessible joints.

However, barriers are not static and new technology development and case studies indicate that these barriers change over time. Uncertain structural properties of reused steel can be seen as a barrier to reuse, requiring destructive testing to determine tensile strength and thus steel grade. However, new research from Fujita & Masuda (2014) outlines an evaluation flow for inspecting steel members in existing buildings and determining their suitability for reuse, describing several non-destructive tests, including portable ultrasonic and rebound-type hardness testers and a portal optical emission spectrometer which can assess chemical composition. These tests can be used to estimate other properties including tensile strength, and from that the steel grade can be assessed, which is needed to efficiently design a steel structure. To progress steel reuse, this framework and technology should be developed into a low cost commercial offering.

3.4 Costs and Potential Profit Opportunity of Reuse

Demolition contractors have a financial incentive to sell steel as scrap for recycling. However, their return is uncertain with a risk from the fluctuating scrap price. In 2015 this was between £160/tonne to £100/tonne (letsrecycle.com, 2015). However, Allwood et al. (p.225, 2012) show that under certain economic and technical conditions, deconstruction and reconditioning is profitable, with the opportunity approximately equivalent to £100/tonne in 2009, although this did not include certification costs. More generally, the profitability of reuse will be dependent on the relative prices of steel scrap and new steel and the cost structures of companies involved in deconstruction and reconditioning. Of particular importance are the marginal labour requirements of deconstruction compared with demolition and the impact this has on the company wage bill. One consideration for demolition contractors considering deconstruction, is the lack of guaranteed demand for reused steel, whereas there is a clear demand for scrap steel. Vulotic (2013) discusses the potential of a web-based exchange portal for reused steel, concluding that the business case for this would need developing, but it could be an effective mechanism to increase demand for reused steel.

Analysis by Geyer & Jackson (2005) suggests that reused supply chains face a number of constraints, including limited feasibility of deconstruction and re-fabrication, and limited market demand for re-fabricated sections. These affect the potential profitability and scale of reuse, whereas recycling supply chains do not face these constraints. In addition, it is suggested that the 'easy win' buildings will be deconstructed first, meaning that potentially, with increasing steel reuse, the cost savings decrease as deconstruction and re-fabrication become technically more challenging and thus more expensive (Geyer & Jackson, 2005). Whilst this might be the case, there is a significant proportion of 'easy win' buildings, which could be targeted to increase current reuse. Those more challenging buildings to deconstruct could be demolished if economic gains from reuse were negligible.

3.5 Conclusions from literature review

Existing literature demonstrates that there are material/emissions savings from steel reuse, and case study assessment demonstrates that it is practical under the appropriate market conditions.

Together these show that steel reuse is a viable emissions reduction strategy, but in the UK it is far from common practice, and the latest assessment shows a picture of declining reuse. Exploration of barriers to reuse have to date focused on the theoretical, and give a global view, with the following six barriers most commonly discussed: perceived risk in specifying reused materials, financial constraints, composite construction, lack of a reuse market/supply chain, time constraints and restrictive joint types. However, there is a lack of understanding of the actual, practical barriers to steel reuse, and who in a design team faces these. It is important to understand what different design team members perceive as the major challenges, as this may influence how they approach and respond to reuse opportunities. This paper explores the practical barriers to steel reuse, focusing specifically on the UK market, across the delivery supply chain, supplying new insights into where practical barriers exist, investigating who in the supply chain is affected by these barriers. Building on this, recommendations to overcoming the identified barriers are identified and discussed to facilitate increased steel reuse in the UK.

4 Methodology

A series of semi-structured interviews were conducted with a range of practitioners across the UK construction supply chain in order to gather information on the barriers and benefits experienced and perceived when reusing structural steel. Interviewees were identified through a range of techniques, including approaching experts at the 2014 annual Steel Construction Institute event, contacting known professionals in the construction industry and finally through the snowball technique – where existing interviewees identify other experts to participate. Interviewees with both experience and no experience of steel reuse were selected so information could be gathered from those who had first-hand knowledge of structural steel reuse and from those who were in a position to reuse steel, but to date had yet to do so. The interviewees selected were predominately structural engineers, contractors and fabricators as these are the stakeholders who would specify and deploy reused steel on new construction projects. Two architects were also interviewed in order to gauge wider design team perceptions on steel reuse. Efforts were made to select a representative sample of companies across the delivery supply chain.

A semi-structured interview technique was selected as a set series of questions enabled consistency and comparable interview responses, but further expansion questions could be added in order to gain deeper insights where appropriate. A common set of twelve questions was developed for all interviewees – both those with and without experience of steel reuse. A second set of questions was also developed, which varied depending if the interviewee had experience or not of steel reuse. The question set for those without experience consisted of thirteen sub-questions, and the set for those with experience had twenty-one sub-questions. The additional questions for those with experience were project specific, gathering details on the project(s) where steel was reused in order to gather both case study insights and the interviewees' experience of reusing steel on these project. A full list of all interview questions can be found in the Supplementary Information for this paper.

The barriers discussion is the predominate focus of this paper, three different techniques were undertaken to explore these, an unprompted discussion, a prompted discussion, and a prioritisation of the barriers. An initial *unprompted* discussion of barriers to structural steel reuse was instigated with interviewees; allowing them to respond, without being led, with their first impressions on what the barriers were to reusing steel. Following this, a list of barriers compiled from literature were shown to respondents, who were asked to state for each possible barrier if they thought it was or was not a barrier to structural steel reuse, respondents could also state if they were unsure (*prompted barriers*). In order to gain an understanding of the perceived significance of each barrier, interviewees were asked to reflect on the earlier discussions and state, in their opinion, the three most significant barriers to steel reuse (*prioritised barriers*). From this, they were then requested to consider and discuss methods to overcoming these barriers. A broader discussion of any personal experiences with reusing steel was then conducted (where the two sets of questions were utilised). The interviews concluded with a series of forward looking questions on the future potential of steel reuse and the role of design for deconstruction. Generally, the interviews lasted between 60-90 minutes to ensure good coverage and depth of responses and were ideally conducted face to face, but on occasion, circumstance determined that a telephone interview was required. Table 2 summarises the different interviewees, their roles, experience of steel reuse and each interview type. For the analysis, the interview responses were thematically coded, based on knowledge of the relevant literature, grouping similar responses together so the frequency of occurrence could be assessed.

| Interviewee No. | Company Category | Role | Experience of Steel Reuse | Interview Type |
|-----------------|---------------------|---|-------------------------------------|----------------|
| 1 | Contractor | Principle Engineer | No | Face to face |
| 2 | Contractor | Head of Sustainability | Yes – in-situ | Face to face |
| 3 | Contractor | Engineer | Yes – relocated | Face to face |
| 4 | Contractor | Senior Design Manager | No (considered but not implemented) | Face to face |
| 5 | Structural Engineer | Structural Engineer | Yes – relocated | Telephone |
| 6 | Structural Engineer | Senior Engineer | Yes – in-situ | Face to face |
| 7 | Structural Engineer | Senior Engineer | No | Face to face |
| 8 | Structural Engineer | Senior Engineer | Yes - relocated | Telephone |
| 9 | Fabricator | Safety, health and environmental director | No | Telephone |
| 10 | Fabricator | Technical Advisory Engineer | Yes - relocated | Telephone |
| 11 | Fabricator | Senior Design Engineer | No | Face to face |
| 12 | Architect | Architect | Yes – in-situ | Face to face |
| 13 | Architect | Architect | Yes – in-situ | Face to face |

Table 2: Interviewee Information

5 Results: barriers to and benefits of structural steel reuse

This section summarises the key findings from the interviews. It is split into four sub-sections, the first three deal exclusively with barriers to structural steel reuse, distinguishing between the unprompted, prompted and prioritised barriers, covered in sub-sections one to three respectively; the final sub-section discusses the perceived benefits of structural steel reuse.

5.1 Interview Results: unprompted barriers

This section outlines interviewees' unprompted responses to an open question 'what do you think are the main barriers to structural steel reuse?' Interviewees were also asked to explain why they perceived this as a barrier. The results are summarised in Figure 2, and outlined below.

One barrier, 'supply chain dynamics and availability of reused structural steel', was mentioned most by respondents (out of total of fifteen barriers identified); eight (of the thirteen) interviewees stated that was a barrier. In essence this barrier, according to a contractor interviewed, was ensuring that *'the right steel is available in the right part of the country, when the client wants it, and quick enough'*. The requirement, therefore, is that reused steel is as easy to source as new steel, and incurs minimal risk of project delays. However, there is a strong perception that this is not currently the case. Six interviewees stated they were unsure where you would source reused steel from, and were sceptical that appropriately sized steel would be available. Concern over potential 'additional costs' from reused steel was also flagged as a barrier, where in the project delivery that these costs might occur is discussed further in section 5.2. A 'lack of awareness' about reused steel across the supply chain was the third most frequently mentioned unprompted barrier. 'Lack of client demand' was also highlighted as a barrier by three interviewees, suggesting that clients could drive steel reuse. 'CE marking' (introduced for fabricated steelwork from July 2014), 'traceability/certification', and 'design team buy-in' were all mentioned as barriers by three different interviewees. Seven more barriers, as shown in Figure 2, were also proposed by one or two interviewees, implying these are less significant or immediately obvious than those barriers more commonly discussed.

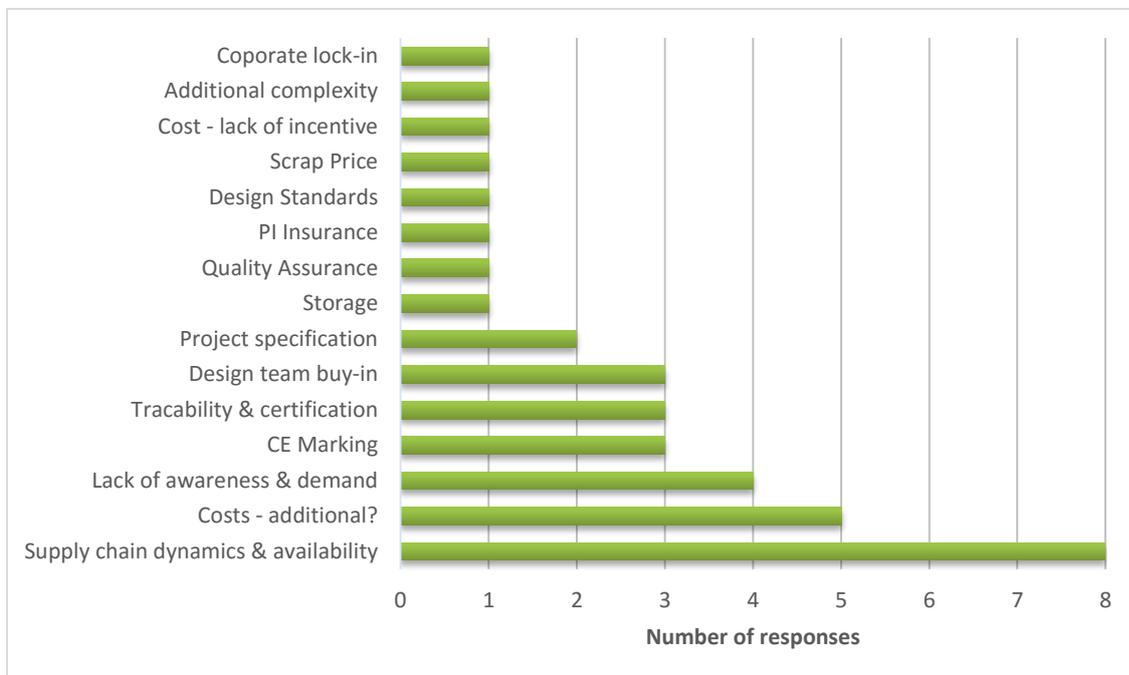


Figure 2: Respondents view of barriers to structural steel reuse, from the unprompted discussion

5.2 Interview Results: prompted barriers

After the unprompted discussion, interviewees were asked to review a list of barriers compiled from existing research on structural steel reuse and indicate if they perceived these barriers to exist when reusing structural steel in the UK. For each barrier, interviewees were asked to explain their answer. Figure 3 shows the results of these discussions from twelve interviews, (due to restricted interview time one interviewee was not asked this question). Six barriers were identified by ten or more respondents, suggesting that these are the most commonly perceived barriers:

- Lack of client demand
- Lack of supply chain coordination and integration
- Storage of recovered materials
- Construction sector inertia
- Lack of information about existing structure and materials

- Jointing technique

'Lack of client demand' was almost unanimously considered a barrier. It was suggested that if more clients requested reused steel, the market would change significantly and the design team would work together to achieve steel reuse. Although one architect suggested that lack of client demand is *'not so much of a barrier, but more of a lack of incentive'*. In addition, interviewees recognised that this current barrier could become a driver of future reuse. 'Lack of supply chain coordination and integration' was a frequently identified barrier. When invited to explain further, there was little consensus regarding who would procure and supply reused steel. Two interviewees indicated there might be a role for a new stakeholder, not currently operating in the construction steel supply chain. Linked to this, is the need for 'storage of recovered materials'. Interviewees proposed that to match supply and demand, elements would likely need to be stored for a period after salvage. Further research could analyse the steel stockholding capacity in the UK, undertaking discussions with current industry players to ascertain the likelihood of them expanding their product offering to include reused steel. Inertia in the construction sector and unwillingness to deviate from business-as-usual practices was also highlighted as a barrier. One interviewee stated that *'things get put in the "too-difficult-box"'* and another said this inertia is driven by cost, as changes from business as usual could result in cost increases. However, many respondents did feel that this particular barrier could be overcome through increased client demand, as the supply chain can and does effectively respond to this. A lack of information about the existing structure and recovered materials was considered by many to be a barrier, although many interviewees thought this could be overcome by testing (which might incur minimal costs) and improved in the future through asset tagging. Testing was also thought to overcome the barrier of a 'lack of performance guarantees for reused materials', another barrier highlighted.

'Jointing technique', largely welded connections for steelwork was thought to be a barrier by many respondents as the steelwork would have to be cut out. However, some posited that this still might be the fastest way to deconstruct a building and wondered if the steel would still be reusable if carefully cut out. Other concerns were raised regarding the additional time required for deconstruction, as this would increase costs. 'Inaccessible joints' were also thought to be a barrier for this reason, in addition to limiting reuse potential. In contrast, 'composite construction' (concrete and metal deck flooring with shear studs connected to steel floor beams) was thought to be a barrier by only half the respondents, with one contractor stating that it just affects *'what percentage yield you could get out of the structure'*.

Concerns about additional costs were considered a barrier in the unprompted discussion, and in this prompted discussion, a series of possible areas for additional costs were suggested. Two thirds of respondents thought that additional design costs and increased deconstruction costs would be barriers; while five thought insurance costs could be a problem. Although there was debate as to whether it might be personal indemnity insurance, or collateral warranties that would be affected; four respondents were uncertain if this was a barrier as it could be overcome by testing and traceability of steel. The impact on project programme due to additional deconstruction time, including associated costs, was perceived as a barrier by only a third of interviewees. One contractor stated that *'programme is just perception'*, and an architect thought that deconstruction could easily be factored into a project if it was a known entity at the beginning of the project. Fabrication costs were also thought to be a barrier by a third of respondents, with two fabricators saying it *'should be like any other job as long as you know the steel grade'*, and the third stating that it *'would be dependent on the building'*. Only a quarter thought material costs would be a barrier. One respondent even stated that *'in theory it should be cheaper'*. No interviewees cited 'prohibitive domestic policy', 'access to finance' or 'competition' as barriers to structural steel reuse. 'Competition' was thought to be a driver for reuse. Seven respondents suggested that that abilities and experience of steel reuse would make them more competitive during tenders for certain clients.

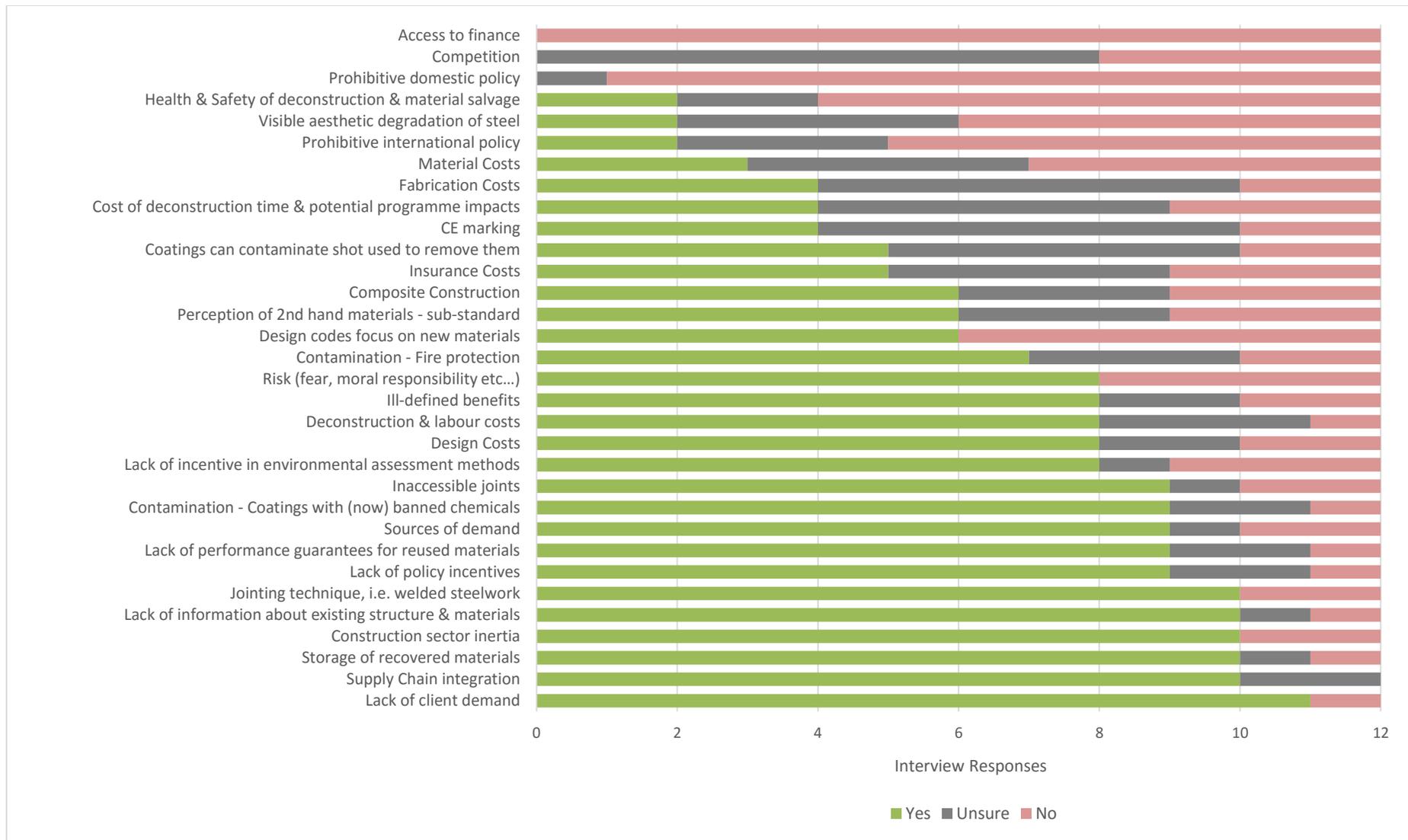


Figure 3: Prompted interview results, from left to right: yes, maybe and no responses to suggested barriers

5.3 Interview results: prioritised barriers

The next section of the interview focused on prioritising barriers. Interviewees were invited to consider which barriers, both prompted and unprompted, were the most significant for the construction supply chain and how they might be overcome. In total, eleven different major barriers were highlighted, as listed in Table 3. The three top barriers were 'cost' (although it was thought this would reduce over time due to economies of scale); 'availability and storage'; and 'no client demand/client perceptions'. 'Quality assurance and traceability' and 'gaps in the supply chain' were also identified by a quarter of interviewees as major barriers. These barriers are all largely systemic across the construction sector rather than technical engineering barriers.

| Barrier | Responses of top 3 barriers | Options to overcome the barrier |
|---|-----------------------------|---|
| Cost | 6 | <ul style="list-style-type: none"> - Good case study projects to demonstrate what works and the benefits - Economies of scale & shift to more reuse would mean the market would likely drive the cost down - Government incentive to kick-start industry, either subsidise or create shared storage facility, making availability known - An assessment to show costs are worthwhile & potential scalability - Might be more economical if done at scale - Reused steel would need to come into the shop the same as new sections, economies of scale might help this |
| <i>General</i> | (3) | |
| <i>Deconstruction</i> | (2) | |
| <i>Shot-blasting</i> | (1) | |
| <i>Fabrication</i> | (1) | |
| Availability & Storage | 6 | <ul style="list-style-type: none"> - Network of suppliers/procurement options required & clear availability - Create links between demolition contractors & stockists, but for business to change would need to know there is demand - Make it clear what is available, there needs to be an equivalent of the blue book on designers' desks, although this could be in a website form - Need demand to incentivise demolition contractors to deconstruction and salvage; & a list of suppliers of reused steel - On-site testing to speed up process |
| No client demand & client perceptions | 4 | <ul style="list-style-type: none"> - Paperwork/testing to show quality of reused steel - Government leadership in their procurement could stimulate a change - Showing reuse can be cost effective - Show potential for 'green' marketing |
| Quality assurance & traceability | 3 | <ul style="list-style-type: none"> - Testing & clear guidance required - Need to better understand the steel reuse process |
| Supply chain gaps & lack of supply chain integration | 3 | <ul style="list-style-type: none"> - Need to incentivise deconstruction, show demand/financial gain to supply chain so gaps to deconstruct, store & test reused steel are filled by those who see a business opportunity |
| No clear financial incentive | 2 | <ul style="list-style-type: none"> - Client demand & better understanding of economic viability - Policy incentives, or credit in environmental assessment methods |
| Inertia in the construction sector | 2 | <ul style="list-style-type: none"> - Education & clear guidance for reuse would support change - Need to show a clear financial gain/incentive to get industry to change from business as usual |
| Impact on design | 2 | <ul style="list-style-type: none"> - Prevent reuse dominating a project, balancing environmental factors with client requirements - Consider when reuse is introduced, giving clear guidance for reuse - so whole supply chain can facilitate & meet a defined good reuse practice |
| Lack of designer knowledge | 1 | <ul style="list-style-type: none"> - Clear guidance for reuse, as well as educating the sector about steel reuse as an option, technical case studies |
| Lack of incentives | 1 | <ul style="list-style-type: none"> - Incentives for stockists - financial; clients - help with planning, or environmental assessment credit; deconstructing buildings - incentive needed here too |
| Lack of defined benefits | 1 | <ul style="list-style-type: none"> - Highlight and document the benefits, & give guidelines for when reuse is most beneficial |

Table 3: Top barriers to structural steel reuse as identified by interviewees

5.4 The benefits of steel reuse

The final part of the interviews dealt with potential benefits from reusing steel, with interviewees asked, *'in your opinion, are there any benefits of using re-used steel? What are they?'* All interview respondents felt that there were benefits to reusing steel. Many focused on the environment benefits, including, reduced embodied carbon and energy, reduced use of virgin materials, and improved sustainability, with one respondent stating that it is *'the right thing to do'*. The potential for growth of a reused steel market was also perceived by one respondent as a benefit for UK Plc, and several discussed the marketing benefit of reducing embodied carbon through increased steel reuse. All interviewees stated that they would consider reusing steel in future projects, and the two contractors and two structural engineers who had experience reusing steel (in-situ, component reuse; and re-located, element reuse) all said it was a positive experience.

6 Discussion

This section discusses the barriers according to interviewee's experience and role. It also compares the interview findings to those theoretical barriers from existing literature and discusses the emerging themes to overcome the significant, systemic barriers identified through interviews. Four, non-exclusive, complimentary, options are identified to overcome the practical barriers highlighted by interviewees. These are: (1) the creation of a database of suppliers/reused section availability, (2) a clear demonstration of client demand (3) technical guidance and education for the construction industry and (4) government leadership. These suggestions will be discussed further in sub-sections 6.2 to 6.5.

The major barriers were mapped across the supply chain to explore if there was any correlation between place in the supply chain and perception of the significant barriers. There did not appear to be any strong correlations, although this may be due to small sample size. Responses about quality assurance and traceability were all from either contractors or steelwork fabricators likely speaking to their perception of carrying the majority of this risk. However, all the other major barriers discussed were distributed across the supply chain.

The barriers were also mapped across those six interviewees (out of thirteen) who had successful experience of steel reuse (four in relocated reuse, two with in-situ reuse). This yielded only one correlation: the three interviewees who felt that there was a supply chain gap, all had experience of steel reuse (two relocated, one in-situ).

6.1 A comparison of barriers to structural steel reuse between literature and interview stages

A comparison was made to show how barriers from literature compare with the top barriers across the interviews stages, as shown in Table 4. From interview stages, the top five prioritised barriers are compared to the top six unprompted and prompted barriers, with the percentage of respondents citing each barrier shown. This was to explore if and how interviewees' understanding of reuse evolved as they considered how it would affect them and how the entire supply chain might need to adapt. Across the stages there was some variation in the frequently discussed barriers, however, all major barriers were picked up as common barriers in either the unprompted or prompted discussions – or in some cases both (client demand and availability/storage). In the prompted barriers discussion, cost was broken down into different areas, e.g. design costs and material costs, thus cost overall wasn't one of the most commonly identified prompted barriers due to a lack of consensus on which potential cost would be the biggest barrier.

Furthermore, there is a marked difference between those barriers most commonly discussed in literature to those highlighted as major barriers in the interviews, with only two common ones: 'cost' and 'supply chains gaps & lack of integration'. In many cases, the main barriers raised in literature, in practice, were felt to limit potential recovery of reused materials (e.g. jointing, composite construction and time for deconstruction) but weren't actually perceived as preventing

reuse in the industry. The interviews with practitioners conclusively highlighted overarching, systemic barriers that need to be addressed to facilitate steel reuse, which contrasts with existing literature. Understanding and overcoming these systemic barriers should have a significant impact in improving steel reuse. The four identified options to overcoming these systemic barriers, as highlighted at the start of the section, are discussed in the following sub-sections.

| Barrier | Literature | Semi-Structured Interviews | | |
|--|------------|----------------------------|----------|-----------|
| | | Unprompted | Prompted | Top Three |
| Cost | | 42% | | 50% |
| Availability/Storage | | 67% | 83% | 50% |
| No client demand | | 33% | 92% | 33% |
| Traceability | | 25% | | 25% |
| Supply chain gaps & lack of integration | | | 83% | 25% |
| Inertia | | | 83% | |
| Lack of information about reused materials | | | 83% | |
| Joining technique | | | 83% | |
| CE Marking | | 25% | | |
| Design team buy-in | | 25% | | |
| Risk | | | | |
| Composite Construction | | | | |
| Time constraints for deconstruction | | | | |

Table 4: Comparison of top five-six barriers from literature and across the interview stages, with the percentage of interviewees who highlighted the respective barrier shown

6.2 A database of suppliers and section availability for reused steel

Where to source reused steel from and uncertain availability was identified as a key barrier by many interviewees. However, this barrier would only apply to relocated element and component system reuse. A database of suppliers was commonly mentioned as a method to overcome this barrier, taking this a step further, knowledge of which sections are available would remove any uncertainty about supply. There are already reclamation yards in the UK, and many of these have a website showing availability of materials. However, it could take significant amounts of time to source materials in this manner and a review of these sites by the authors revealed very few structural steel sections were available. Procurement in a similar manner to that of new sections would be an easier adjustment for the supply chain. One option would be the emergence of a new player within the steel reuse supply chain, that of a reused steel stockholder, as shown in Figure 1. Existing stockists could also expand their offering to include reused steel. This would provide clarity in sale and procurement routes for the supply chain. If a database of reused stockists was maintained, they could be contacted to ascertain stock availability, or this could be listed on websites, as suggested by Vukotic (2013). However, steel stockists are unlikely to emerge until there is a clear business benefit and demand for reused steel, the simultaneous development of these will likely take time. Thus, short-term transition solutions to facilitate increased reuse and overcome some of the initial barriers will likely be required. These will be intrinsically interlinked with a prediction or demonstration of an increased demand for reused steel, as more demand should fuel the transition; as discussed in the next section.

6.3 The feasibility of demonstrating a demand for reused steel

A key barrier discussed in the interviews was insufficient client demand for reused steel. However, one contractor stated that there are *'some clients who would love to do it, but it's too big a risk to demand it'*. This suggests that some clients are not only receptive to the idea but actively want

design teams exploring it as an option. With growing awareness across the construction sector of the significance of embodied carbon, material efficiency and the circular economy, the reuse of materials is gaining visibility, making it more likely that demand for reused steel will increase. However, demand will need to be clear and the market conditions right for demolition contractors to alter their business model to deconstruct and salvage materials. This move into deconstruction, under the appropriate cost conditions, would enable demolition contractors to expand into new markets and would provide increased revenue.

For this to work there would need to be a mechanism for designers, contractors and clients to show a demand for reused steel, enabling demolition contractors to respond and supply it. A web-portal that matches the supply and demand for reused steel would be an effective mechanism to achieve this. Such a web portal, Planet Reuse (2015), exists in the USA for all reused materials, where users state if they have reused materials or want reused materials. Funding has been obtained to explore the feasibility of a more specialised reuse web-portal for relocated steel elements and components in the UK; Figure 4 shows how this web-portal might work.

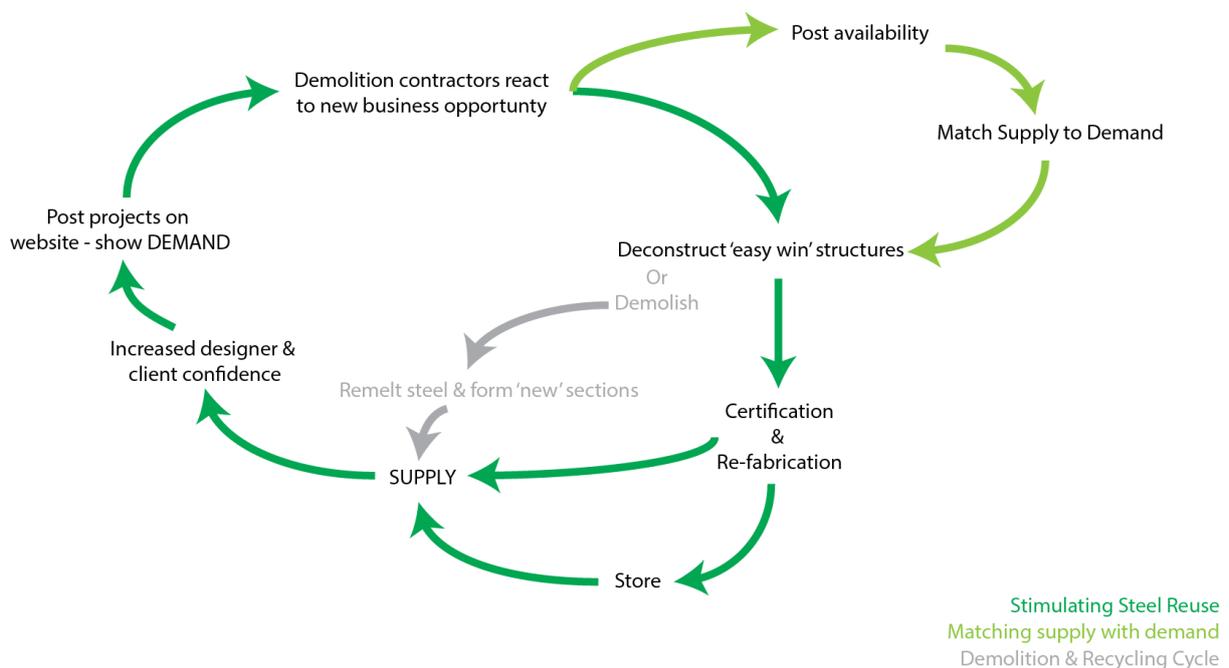


Figure 4: Matching supply and demand of reused steel

6.4 Guidance and education for reused steel

In the interviews there was a consensus that there is a lack of guidance on reusing steel, particularly design and testing requirements, as well as a lack of industry awareness that steel reuse is a viable option. Targeted steel reuse guidance and education for clients, structural engineers, architects and contractors were suggested to overcome both of these barriers. For example via information documents, webinars, seminars, or built into Continuing Professional Development (CPD).

The multifaceted benefits of reusing steel should also be highlighted so it is considered more often as an option. This should build on existing work by Bioregional and WRAP; for example 'The reclaimed building products guide' (2008), which quotes a BRE environmental profile, showing reused steel has a 96% environmental impact saving compared to 'new' steel (with 60% recycled content). There is a risk of inefficient reuse of steel due to overly conservative design and potential difficulty in sourcing specific sections. Guidance should therefore highlight this risk, reducing the former and encouraging early sourcing where possible.

Building on this, detailed guidance is required on the process of designing with reused steel. A set procedure for testing (destructive and non-destructive) would be useful, with a list of suitable test houses. This guidance should be developed by, or in conjunction with, an industry body, for example the Steel Construction Institute (SCI) or the Institute of Structural Engineers (IStructE) in the UK, to ensure credibility across the construction sector. Guidance should also be given on the applicability of CE marking; taking the form of a published common understanding from the main industry associations (for example SCI, IStructE, and British Constructional Steelworkers Association (BCSA)) to overcome this potential barrier and remove uncertainty for the industry. The suggested guidance would enable more designers and contractors to confidently reuse structural steel, and to increase reuse rates.

6.5 The role of Government

Government intervention to increase structural steel reuse could take many forms. Softer initiatives might include setting up a registry for suppliers of reused steel, information sharing, awareness raising, and recognition for projects leading steel reuse, for example through industry awards. These initiatives should be launched in conjunction with industry associations who are focused on improving the sustainability of construction, or joint government and industry initiatives, such as the Green Construction Board.

Local governments could incorporate design for deconstruction objectives into local planning regulations in order to increase the future amount of reused steel available. One option to increase the steel available for reuse locally would be to require all buildings that register for demolition to have a pre-demolition audit to ascertain what materials could be salvaged, there is already a standard procedure for this and they can be carried out as part of BREEAM certification (BRE, 2015). If there are substantial carbon savings to be made, over a minimum threshold, there could be a notice issued by the Local Authority Building Control requiring deconstruction and material salvage. Central government could also be involved to standardise the approach.

Central government could also catalyse demand through public sector procurement rules, specifying a percentage mass of all steelwork to be reused. There is already a precedent from 'Insights from the Government Buying Standards' determining that, as a minimum, all new builds in Government Estate achieve a BREEAM excellent rating (BRE Global, 2015). In 2013, public funded construction was £20bn, accounting for 37% of the value of all new projects in the UK (ONS, 2014). Cooper et al., (2016) use input-output techniques to estimate that the construction sector spent £1.7bn on steel used in construction in 2011. Assuming that 37% of this steel expenditure goes into public funded construction projects and the price of reused steel is 10% lower than new steel, replacing 5% of new steel with reused steel could save £3m. If implemented, this level of demand should reduce design and certification costs through economies of scale, would raise awareness across the construction sector, increase designer/contractor confidence and encourage increased deconstruction of buildings supply reused steel to public sector projects.

The UK government also has the option to provide fiscal incentives to stimulate and support new business development related to reuse; for example subsidising the storage of reused steel. However, this is unlikely to occur in the current political climate unless an initiative is designed to be fiscally neutral. Furthermore, reuse has not received much government interest to date in spite of the potential macroeconomic benefits. For example, reuse would reduce the trade deficit in steel products, valued at over £230m in 2014 (estimated from HMRC, 2015). It has also been shown by Cooper et al. (2016) that reuse has the potential to lead to a modest increase in domestic employment in the construction sector supply chain, as deconstruction is more labour intensive than demolition. Possible reasons for the current lack of government interest are: the legislative focus on operational rather than embodied emissions, lack of awareness around steel reuse as a viable emissions reduction strategy, and a general reluctance to legislate and thus overtly intervene in a sector which is so critical for future UK economic growth (BIS, 2012).

6.6 Conclusions and Next Steps

This paper has characterised structural steel reuse into six areas, splitting in-situ reuse from relocated reuse, dividing each of these into three different scales of reuse: building, component and element reuse. This is significant as different reuse types will present different opportunities and will face different barriers. By characterising into these types, these opportunities and barriers can be specifically discussed. To understand these opportunities and barriers, a series of semi-structured interviews were held with participants from across the UK construction supply chain. From in depth debate of the different barriers to structural steel reuse, the following were prioritised by interviewees as being most significant: cost, availability/storage, lack of client demand, traceability of steel, and supply chain gaps/lack of coordination. These barriers are systemic and thus require a coordinated approach and interventions across the supply chain. A key conclusion is that the practical barriers highlighted in this paper differ from some of those most commonly discussed in literature: cost, supply chain gaps/lack of integration, risk, jointing technique, composite construction and time for deconstruction. The latter three barriers in particular are technical barriers that will reduce the practical recovery rate from specific buildings, which may, in the long term, limit availability once 'easy win' buildings have been deconstructed, but, as identified in the interviews, systemic barriers such as cost, supply chain gaps/integration and lack of demand present a more immediate and significant practical challenge for the industry that must be tackled first.

Derived from the interviews, four complementary mechanisms are proposed to overcome the systemic barriers, these are as follows: (1) the creation of a database of suppliers/reused section availability, (2) a demonstration of client demand (3) technical guidance and education for the construction industry and (4) government leadership. Further work is currently exploring a web-portal to match supply and demand, in order to address and implement mechanisms (1) and (2). Clients and design teams on an individual basis could also create a greater demand for reused steel, and greater demand should stimulate changes in the demolition sector. Guidance and education for the construction sector, to improve confidence and skills in designing and building with reused steel, is also required, and should be supported and potentially led by professional institutions. Further research and commercialisation of quick, cheap testing methods to demonstrate steel properties would also be beneficial, in order to demonstrate traceability and improve designer and contractor confidence in the grade and quality of procured reused steel. There is also a role for government, at national and local level to show leadership in this area, in particular by encouraging pre-demolition audits and deconstruction, and through public procurement. The energy/greenhouse gas emissions saved and resources conserved make a strong environmental case for reuse, these were highlighted by interviewees as the major benefits of reuse. By implementing the recommended mechanisms, the identified barriers to structural steel reuse can be overcome, increasing steel reuse and thus enabling the benefits from reuse to be realised.

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