

Evaluation of Elsevier cancellation

1.1. Background

After lengthy negotiations with Elsevier starting in the spring of 2016, the license agreement was cancelled on 30 June 2018. The reason for this was that the publisher was unable to accommodate the requirements of the Bibsam Consortium:

- Immediate open access to all articles published with Elsevier by researchers affiliated with the participating organisations of the consortium,
- Reading rights to Elsevier's 1 900 journals for with the participating organisations of the consortium,
- A sustainable price model that enables the transition to open access.

In Sweden, 44 organisations participated in the agreement, which ran from January 1st, 2014, to June 30th, 2018.

1.2. Aim

Evaluate the consequences of the cancellation of the Elsevier agreement, based on the following perspectives; users (researchers/research students at higher education institutions (HEIs) and users at government agencies), participating organisations and consortium:

- 1. Users (researchers/research students at higher education institutions (HEIs) and users at government agencies)**
 - Users' strategies to access material after the cancellation,
 - Users' reactions and attitudes to the cancellation,
 - Users' attitudes to publishing with Elsevier post-cancellation,
 - Users' attitudes to being editors and peer-reviewers for Elsevier journals post-cancellation.
- 2. Participating organisations**
 - How have the organisations worked with information and communication on the cancelled agreement?
 - How has the cancelled agreement affected workflows?
 - Have the organisations worked with information and communication on alternative roads to access? If applicable,

what systems/services are used by libraries to help researchers to access articles and at what costs?

- How have the organisations handled interactions and separate subscriptions with Elsevier?
- How do the organisations use the “saved” money?
- To what extent has the cancellation affected budgetary work?
- How have Vice Chancellors handled the cancellation?

3. Consortium

- How has the consortium worked with information and communication on the cancelled agreement?
- What attention has the cancellation received internationally?
- How has the cancellation affected Elsevier?
- How has the cancellation affected other negotiations?

The evaluation group may prioritize and possibly revise the above questions, in dialogue with the Bibsam steering committee.

The evaluation will serve as a basis for continued negotiations with Elsevier and other publishers. Its findings should be of use in strategic discussions with HEIs, research funders, and representatives of the Ministry of education and research, on future business models on OA to research publications.

1.3. Method

The collection and analysis of the following quantitative and qualitative data:

- consortium and HEI/library economic data
- Publication data from Scopus/Swepub
- Survey and interview data from researchers/students, Vice Chancellors and library staff from participating organisations of the consortium, regarding attitudes, financing, OA requirements or preferences, and different metrics.

1.4. Reporting

- Findings are to be reported continuously to the Bibsam steering committee as well as to the open access advisory group established within the Forum for National Library Collaboration and Development.
- Materials collected from October 2018 to March 2019 are to be analysed and written up in a Swedish report in June 2019.
- Relevant findings are to be published in a peer-reviewed OA journal.

1.5. Evaluation group

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