

# 3

# THE IMPACT OF OPEN ACCESS

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

**EBSCO**

**RED SAGE**  
CONSULTING



### About EBSCO Information Services

Established in 1944, EBSCO is one of the leading providers of information solutions in the world. We address the needs of customers in the UK and in over 190 countries worldwide, with more than 5,700 employees in 30 regional offices. Providing print and online resource management tools and related

services, we work with more than 95,000 publishers and hundreds of thousands of libraries worldwide. We are staffed by information professionals, including more than 140 librarians, who speak the local languages and understand the particular challenges faced by librarians today.



### About Red Sage Consulting

Red Sage Consulting is owned by Sarah Durrant. Durrant has 23 years of experience in the information industry, working for publishers, intermediaries, libraries, consortia, and research institutes. Through Red Sage, Durrant provides research, business development, coaching, mentoring, and training services. Durrant runs the popular Licensing and Negotiation Skills for Librarians

course on behalf of UKSG. She is increasingly engaged in coaching and leadership and development work, helping organisations and individuals adapt, innovate, and thrive within the dynamic information landscape.

To get in touch contact:  
[sarah@redsage.org](mailto:sarah@redsage.org)  
or Tel: +44 (0)7715 121910

*Produced in conjunction with Red Sage Consulting*

### Acknowledgement

EBSCO Information Services Europe and Red Sage Consulting offer their sincere thanks to the many colleagues who took part in this survey. We are very appreciative of your time, consideration, and insights.

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# ABOUT THIS SERIES OF PAPERS

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

## *Introduction*

The academic information supply chain remains a complex and highly dynamic arena due to a wide range of factors, including the continuing impact of new and emerging technologies on information delivery; the ubiquity of technology in teaching and research; changing research practices; changing user behaviour and expectations; the entry of new service providers and the evolving roles of existing players; changing business models; financial pressures on libraries and institutions and the wider economic climate; new and emerging markets; and more.

This series of papers aims to provide a better understanding of this dynamic landscape and, in particular, to explore how the traditional players within the academic information supply chain - librarians, publishers, agents/intermediaries, consortia representatives, and others in the industry - view current and possible future developments. As a first step towards this goal, EBSCO Information Services Europe commissioned a survey titled "The Future of the Academic Information Supply Chain," the results of which are presented as a series of papers<sup>1</sup> corresponding to the survey's main sections. Selected highlights from the survey also were presented at major conferences in Europe<sup>2</sup>.

The **Appendix** provides full details about the survey, its background, when it was conducted, who took part, and the response rate.

## *Papers in this series*

1. *The Future Role of the Academic Library*
2. *Access to Content: Now and in Future*
- 3. *The Impact of Open Access (this paper)***
4. *The Role of Subscription Agents*
5. *The Academic Information Supply Chain: Future Forces for Change*

## *Important Acknowledgement*

In undertaking the survey that underpins this series of papers, our intention was to take a "temperature check" of current opinion within the academic information supply chain. The objective of the papers is not

to present the definitive results of a comprehensive and scientific market survey, but to present a range of interesting views and opinions from a relatively small group of individuals with industry experience.

The papers were intended as a starting point to stimulate and inform further discussion during a series of EBSCO Information Days facilitated by EBSCO Information Services Europe during 2012.

<sup>1</sup>Available from: [contact.eu@ebSCO.com](mailto:contact.eu@ebSCO.com)

<sup>2</sup>The key findings from this survey were presented in plenary at the 2012 UKSG Annual Conference in Glasgow, Scotland, by Ian Middleton of EBSCO; also at the 2012 LIBER Annual Conference in Tartu, Estonia by Jakob Harnesk of EBSCO.

# 3

1 INTRODUCTION

2 EXECUTIVE SUMMARY

3 THE POTENTIAL IMPACT OF OPEN ACCESS

4 OPEN ACCESS: PRINCIPAL BENEFITS

5 OPEN ACCESS: PRINCIPAL DRAWBACKS

# THE IMPACT OF OPEN ACCESS

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

## Table of contents

### *Introduction*

In this paper, the third in a series based on results from a survey by Red Sage Consulting, commissioned by EBSCO Information Services Europe: *The Future of the Academic Information Supply Chain*, we present the results from a series of questions exploring *The Impact of Open Access*.

Financial pressures on libraries and institutions; changing research practices; changing user behaviour and demands; evolving business opportunities and changing business models, and facilitating technologies are just a few of the factors supporting the rise of open access publishing.

We surveyed 98 respondents consisting of librarians, publishers, agents/intermediaries, consortia representatives and others in the industry, asking them to share their thoughts and opinions on the potential impact of Open Access on the academic information supply chain, and to describe the principal benefits and the principal drawbacks, as they saw them, of Open Access publishing.

### Appendix

ABOUT "THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN" SURVEY

1

# 3

## THE IMPACT OF OPEN ACCESS

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

### *Executive Summary*

The aim of this survey was to learn more about the potential impact of Open Access on different elements of the academic information supply chain. We also wanted to learn how respondents viewed Open Access.

OA was not generally believed to be the single most significant force for change.

Most respondents thought it unlikely that libraries or publishers would be disintermediated as a result of Open Access.

2

### *Principal benefits of OA*

Most respondents were in favour of OA. The most common benefits cited by respondents included:

- (a) broader societal access to the results of publicly-funded research,
- (b) higher use and citation of articles/reports than otherwise,
- (c) greater interdisciplinary use of content,
- (d) a means of access to knowledge by the developing world.

### *Principal drawbacks*

All respondent groups were concerned over costs/funding and the transition to OA in terms of the level of complexity and what processes would be required to manage the transition. Librarians had by far the highest number of concerns over OA, particularly over the integration of sustainable OA processes, whilst maintaining quality content and controlling cost. Lack of peer review was another common concern. One librarian commented that:

“

*“Models that favour the author’s manuscript version threaten to disrupt proper curation and stewardship of the scholarly record.”*

”

On 17 July 2012, the European Commission outlined measures designed to improve access to publicly-funded scientific research produced in Europe. Progress to Gold open access will mean scientific research articles are freely accessible immediately upon publication, to give Europe a better return on its €87 billion annual investment in R&D. Implementation will require co-ordinated action from all key stakeholders in the research and scholarly landscape.

For more information: <http://bit.ly/EU-OA>

# 3

## THE IMPACT OF OPEN ACCESS

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

### *The Potential Impact of Open Access*

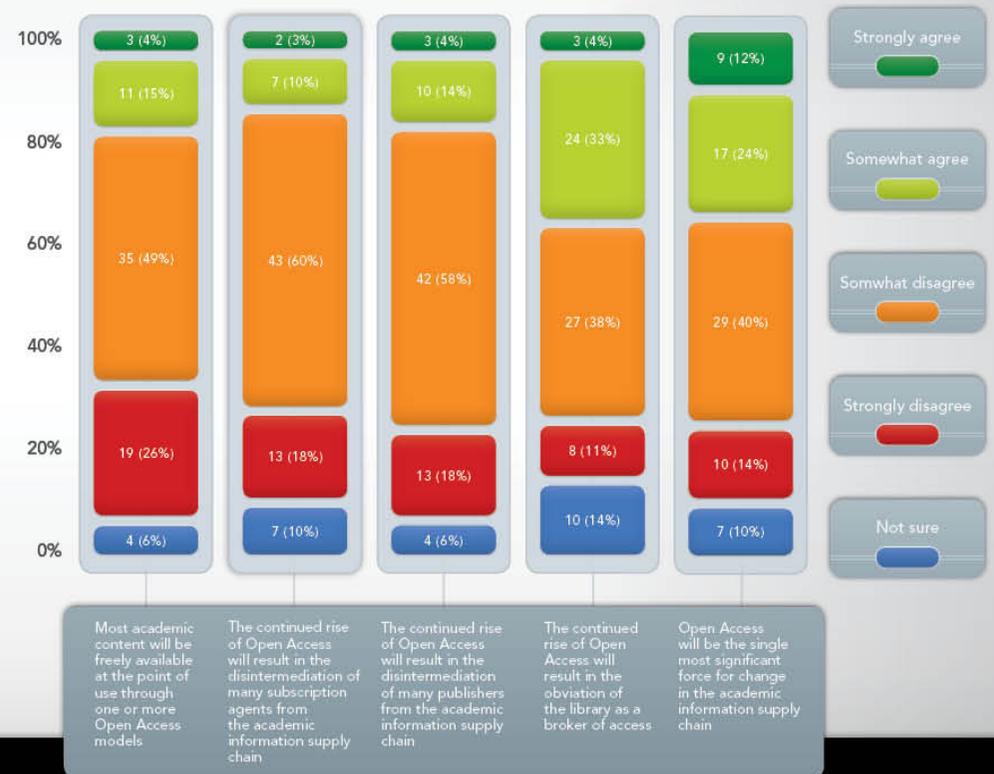
We presented a series of statements concerning the potential impact of Open Access on different sectors of the academic information supply chain. Respondents were asked to respond to these statements,

thinking about the next 3-5 years and basing their responses on what they thought would be the case (not on what they would like to be the case).

3

### Survey responses to statements concerning Open Access

Please respond to the following statements (please comment on what you think will be the case, not what you would like to be the case): Thinking about the next 3-5 years:



Most academic content will be freely available at the point of use through one or more Open Access models

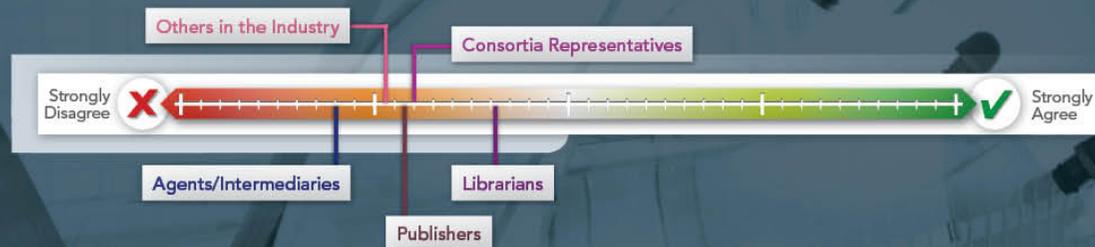
The continued rise of Open Access will result in the disintermediation of many subscription agents from the academic information supply chain

The continued rise of Open Access will result in the disintermediation of many publishers from the academic information supply chain

The continued rise of Open Access will result in the obviation of the library as a broker of access

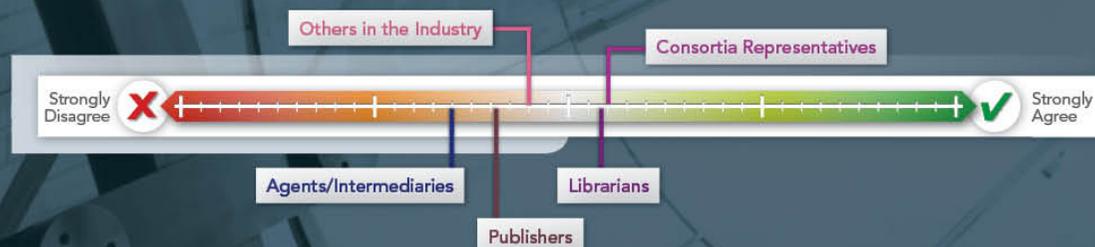
Open Access will be the single most significant force for change in the academic information supply chain

*Most academic content will be freely available at the point of use through one or more Open Access models*



The majority of respondents disagreed with the suggestion that most academic content will be freely available at the point of use through one or more Open Access models. Whilst most librarians disagreed, almost a third of librarians did agree that this would be the case.

*The continued rise of Open Access will result in the disintermediation of many subscription agents from the academic information supply chain*

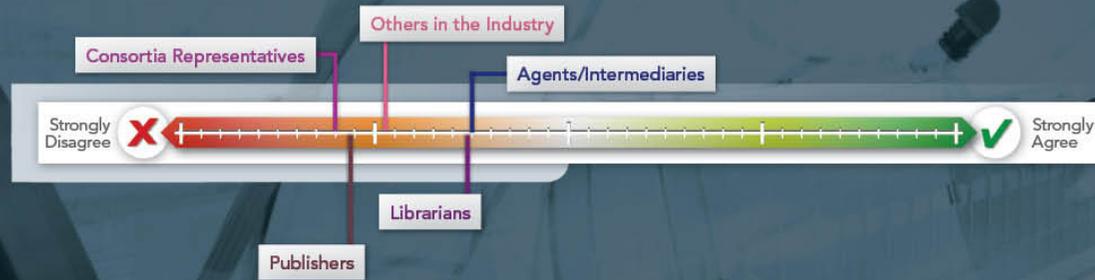


Most respondents disagreed that the continued rise of Open Access would result in the disintermediation of many subscription agents from the academic information supply chain. However, half of librarians and consortia representatives agreed that the rise of Open Access could result in some subscription agent disintermediation.

The growth in electronic resources in the last 15 or so years has shaped the intermediary role considerably and the spread of Open Access may prove to be a similar scale catalyst. In terms of opportunities, in another paper in this series on the Changing Role of Subscription Agents, a significant number of respondents think there could be a substantial role for agents in processing article charges and helping to manage OA funds.

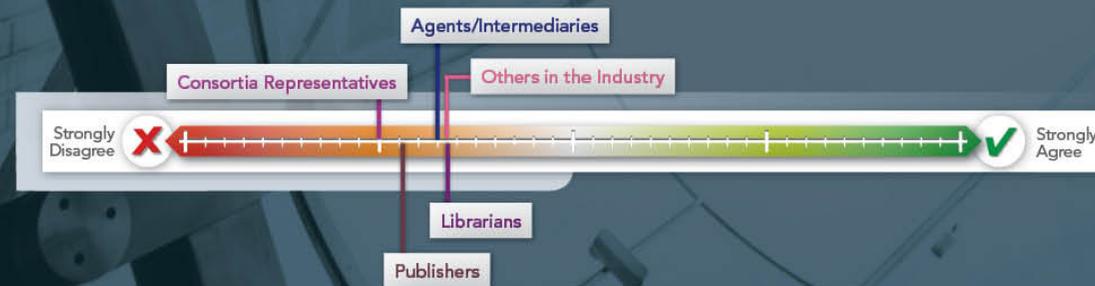
**3**  
**THE POTENTIAL  
 IMPACT OF  
 OPEN ACCESS**

*The continued rise of Open Access will result in the disintermediation of many publishers from the academic information supply chain*



A large majority of respondents disagreed that the continued rise of Open Access would result in the disintermediation of many publishers from the academic information supply chain.

*The continued rise of Open Access will result in the obviation of the library as a broker of access.*



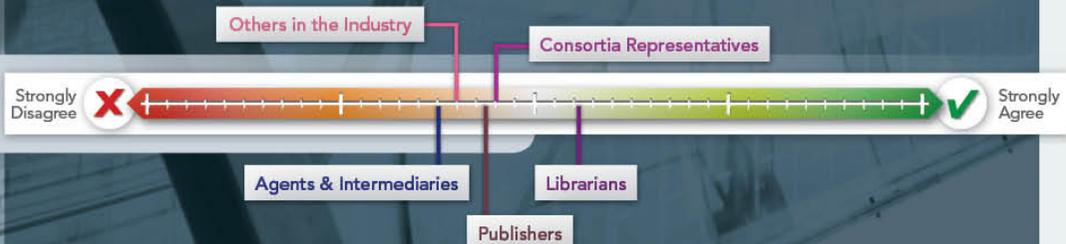
A large majority of respondents (including 84% of publishers and 100% of others in the industry) disagreed with the suggestion that the continued rise of Open Access will result in the obviation of the library as a broker of access.

**3**  
**THE POTENTIAL  
 IMPACT OF  
 OPEN ACCESS**

## Open Access will be the single most significant force for change in the academic information supply chain

Slightly more than half of all respondents disagreed that Open Access would be the single most significant force for change in the academic information supply chain.

However, the librarian cohort group was more in agreement with the statement with slightly more than half responding that Open Access would be the single most significant force for change in the academic information supply chain.



### 3 THE POTENTIAL IMPACT OF OPEN ACCESS

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## The Potential Impact of Open Access: Comments

### Librarians

*“The trend towards Open Access will definitely continue, and it will continue to drive change in the information supply chain, but it is difficult to predict the end point. My feeling is that we will end up with a very mixed picture for the foreseeable future, and that publishers and intermediaries should not fight against the trend but seek to embrace it by providing the facilities and services that authors and readers really want.”*

*“The benefits of OA outweigh the costs, and I believe and hope that OA will continue to grow in importance.”*

### Publishers

*“If Open Access is to succeed in the long run we will need a form of post-publication peer-review, particularly as PLOS-One clones get bigger and less discerning. I’m not aware of any good model for this... yet.”*

*“The phrase “library as broker of access” is jarring... in an OA world, the librarian returns to a world of curation, selection, discovery and information literacy - surely that is far more relevant?”*

### Consortia Representatives

*“It (OA) increases access to content mainly to those who would rarely pay for the content in any case... users and libraries continue to prefer to search for and access content through aggregated, organised, and full-featured, and attractive platforms - as provided or facilitated by the publishers/vendors.”*

### Others in the Industry

*“The question of how much Open Access threatens the existing model really depends on whether funding becomes widely available in all areas for OA. Some disciplines where there is funding OA is a logical step - in other areas where funding for research does not and is not likely to include the cost of publishing it is difficult to see how the model will change significantly. Mandates without funding would appear to be very weak.”*

*“Who can possibly be against the principle of Open Access? If we could move to OA tomorrow, there would be huge benefits to both producers and consumers of research.”*

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# 3

# THE IMPACT OF OPEN ACCESS

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN



## Benefits of Open Access:

### Institutional Benefits

- A greater range of publications potentially strengthening teaching and research
- Greater access to the University's research by all stakeholders/funders
- Greater impact for our own research (measured by citations, downloads)
- Maximises our return on investment (research funder)
- Increased visibility for our best research which may help to secure future funding
- Showcases our best research - free to anyone

## Key themes from Librarians

### Access Benefits

- Greater impact for researchers
- Free, unfettered access to content
- Global access
- Facilitates re-use of information, any time and anywhere
- Broadens access to content that may otherwise be unaffordable at an institutional or individual level

### Financial Benefits

- Saves money
- Moves us away from the traditional subscription model
- Potentially improved citation rates (publications are brought to a wider audience)

Further Comments from Librarians

*"Mainly political. The sense that it is 'wrong' to buy content that has been 'given away' and that academics work for publishers for free. I don't think there is actually much of a problem in getting access to content in academia."*

*"Removes barriers for global access and re-use of information, any time and anywhere - these are the fundamental goals of librarianship."*

## Benefits of Open Access: Key themes from Publishers

### Improved dissemination/access

- Maximum dissemination
- Global access, free at point of use (provisos: peer review process; properly funded)

### Financial Benefits

- Potential for increased advertising revenues
- Upfront payment before costs are incurred
- Predictable revenue stream
- Shorter time for new journals to become established/financially viable
- Puts the financial issue back with authors/funders not the "budget" of libraries
- Dealing with fewer sources of income

### Strategic Benefits

- Provides a choice of business models
- Allows exploration of alternative pricing models
- More opportunities for publishers to add value, including to content originating from other sources
- Aligns publishers with the stated aims of funders and universities
- A platform to publish good quality content that did not make it into top journals

Comments from Publishers

*"Our role is to disseminate content to users; providing there is a business model to sustain it, OA may prove to be a very good model to fulfil that role."*

*"It provides a choice of business models which permits more new entrants into the publishing industry and has the potential to upset the dominance of some large publishers."*

## The Principal Benefits of Open Access

We were interested in learning more about how respondents viewed Open Access, specifically the benefits and drawbacks as they see them. We asked colleagues firstly to state, **from the perspective of their organisation**, what they saw to be the principal benefits of Open Access.

Where there are many responses, these have been grouped under loosely themed headings for ease of reading/navigation.

# 4

### Benefits of Open Access: Key themes from Agents/Intermediaries

- Global dissemination of content
- Lower barriers - easier access and usage for patrons
- Latest research published more quickly
- Possible increased complexity in the supply chain
- More content enabling intermediaries to deliver better resource discovery services
- Less work on the back-end for the publisher i.e. expensive fulfilment systems

### Benefits of Open Access: Key themes from Consortia Representatives

- No need for access management
- No need for licence management
- Broader society access to publicly-funded research
- Higher use and citation of articles/reports
- Greater interdisciplinary use of content
- A means of access to knowledge by the developing world
- Improve world science by free access to science
- Cost reduction

Comments from



Consortia Representatives

*"I can't tell yet. I'm sure researchers like it, but it has to be supported in some way and there is cost impact on academics in one way or another."*

Further Comments from



Agents/Intermediaries

*"Increased complexity in managing the many-to-many relationships."*

*"We can make a lot more content available in our pre-harvested index - thus providing better resource discovery for libraries and their users."*

### Benefits of Open Access: Key themes from Others in the Industry

- Wider dissemination of research
- Gold OA maximises access to content while covering publishing costs
- Increased focus on end-user and usability due to increased competition between publishers and platforms
- More "good quality" research made available
- Makes re-use possibilities easier
- A shop window for research
- Ability to source solutions globally for the benefit of humanity
- Equality of access

Further Comments from



Others in the Industry

*"Who can possibly be against the principle of open access?"*

*"As a research funder, ensuring everyone can access all the research we have funded is the best way to maximise the return on our research investment."*

*"OA represents (a) broader societal access to the results of publicly-funded research and (b) higher use and citation of articles/reports than otherwise, (c) greater interdisciplinary use of content and (d) a means of access to knowledge by the developing world."*

# 3

## THE IMPACT OF OPEN ACCESS

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

*Drawbacks of Open Access: Key themes from Librarians* Several librarians indicated "None" in response to this question.

### "Philosophical"

- Gaining buy-in from academics for the Green and Gold access
- Challenging the perception that OA means low quality
- Challenging the perception that OA means 'free'
- Possible challenge to the library's role in collection development if not involved in OA
- Difficult to make transition

### Financial

- Concern that the costs of article publication charges (APCs) could be greater than the cost of subscriptions
- Concern that larger institutions shoulder more of the burden
- Sustainability is not assured
- Lack of transparency around what is being paid for - costs are not known
- Developing funds to support publication is challenging
- Lack of an internal funding model whilst traditional subscriptions and Gold OA co-exist
- Moving from the current subscription model to the OA model...will incur additional (transition) costs
- Overall cost likely to be similar for a research-intensive institution
- High costs charged by various publishers
- Lack of consistency in pricing

### Process

- Concern about peer review process
- Threat to proper curation and stewardship of the scholarly record
- Displacement of the library from some primary roles e.g. as broker, as discovery agent
- Diversity of publisher policies leads to backlogs and frustration from academics
- The administrative mechanisms for institutional memberships and/or author payments using grant funding are still undeveloped
- Managing payments
- Integration of green and gold routes of OA into the supply chain
- Ensuring and managing access

### Technical

- Discoverability
- Concern that metadata and discoverability may be erratic or inconsistent

### Other

- Reluctance on part of academics to publish due to lack of established reputation of OA journals
- Inability of many traditional publishers to do it effectively, lack of critical mass of data across HE community to demonstrate how much we are doing

### Further Comments from Librarians

*"Lack of an internal funding model while both traditional subscription models and gold OA co-exist."*

*"Models that favour the author's manuscript version threaten to disrupt proper curation and stewardship of the scholarly record."*

*"Displacement of the library from some of its primary roles, e.g., as a broker and as a discovery agent."*

*"Hybrid open access routes from some publishers appear to be sometimes rather cynical exercises in revenue creation."*



## The Principal Drawbacks of Open Access

# 5

Here, we asked colleagues to state, **from the perspective of their organisation**, what they saw to be the principal **drawbacks** of Open Access.

Again, where there are many responses, we have grouped them under loosely themed headings for ease of reading/navigation.

## Drawbacks of Open Access: Key themes from Publishers

### Financial Concerns

- Loss/erosion of subscriptions
- Pricing whilst subscription model is still active (e.g. hybrid model)
- The need to charge more than current OA fees to cover costs
- High impact journals have much higher costs per manuscript published
- More payments to process
- Cash flow
- Could compromise quality and the value added by publishers

- Lack of funding for OA, particularly in Humanities and Social Sciences
- Sustainability: funding not necessarily available for:
  - all subject areas
  - to meet the quantity of research output
  - to support peer review, quality control, editorial work, platforms for discoverability
  - to meet any/all costs over time

### Editorial Concerns

- Quality - peer review might suffer
- Low author interest, particularly in Humanities and Social Sciences
- Lack of known and trusted brands

### Other concerns

- Different stakeholders in the purchasing process of Gold OA
- Sustainability of green OA
- Applicability to the Humanities



### Further Comments from



### Publishers

*"What originates in STM can impact HSS when the latter environment isn't ready for it; OA is far less well known; funding sources in HSS are typically far less common."*

*"To truly cover all of the costs currently covered via subscriptions and licences, publishers would need to charge more than is often suggested as the OA fee."*

*"Most authors have no interest in OA or any means to pay for it, particularly in the Humanities and Social Sciences."*

*"There are various risks in transitioning to OA in terms of whether the OA models adopted will be sustainable (i.e. will support the work of organising peer review, quality control, editorial work, platforms for discoverability, and the development of known and trusted brands for disseminating knowledge)."*

*"High impact journals, with high rejection rates, have much higher costs per manuscript published."*

## Drawbacks of Open Access: Key themes from Agents/Intermediaries

### Financial Concerns

- Loss of subscription revenue
- New service and pricing options needed
- The content subscription agents sell will decrease

### Quality Concerns

- Several in this cohort voiced concerns about lack of editorial and all-round quality
- Lack of ranking and trusted branding
- Volume [replacing] quality and relevance, inevitably leading to lower standards

### Other Concerns

- Future role(s) for agents
- Requires changing processes away from invoicing at point of purchase, to invoicing at the point of submission
- The need for better, common identifiers regarding quality/status of articles

- Open Access still requires intermediation, just in different ways

### Further Comments from



### Agents/Intermediaries

*"Volume (because that is what drives revenues in most OA models) instead of quality and relevance, could inevitably lead to lower standards in scholarly publishing."*

*"[OA] Moves the focus away from the invoicing at point of purchase, to invoicing at the point of submission, which would mean agents would have to change our processes to meet this different requirement."*

5

OPEN ACCESS:  
PRINCIPLE  
DRAWBACKS

## Drawbacks of Open Access: Key themes from Consortia Representatives

- Collation and integration of OA material into Discovery services
- Convincing researchers to make their output available
- The tenure and preferment processes in most disciplines at most universities still favour publication in journals that do not happen to be OA
- Convincing researchers
- The cost

## Drawbacks of Open Access: Key themes from Others in the Industry

### Financial Concerns

- The whole idea of scholarly journals switching to OA is likely not feasible and will not produce the savings some expect
- Scholars not being able to afford to publish either because funds are not there or they are controlled by others
- OA requires that content creators underwrite their costs through other services
- Funding
- Managing funding
- Sustainability - for funders, producers and consumers

### Other Concerns

- The disintermediation of the current supply chain
- Lack of fair and equitable models that work for all parts of the supply chain
- OA adds complexity to the information landscape
- OA has different definitions for different people which causes problems
- Managing the transition
- Tenure

### Further Comments from

#### Consortia Representatives

*"I do not see a serious threat to publishers from OA: someone has to manage the peer review and formal publication process... OA will not affect these needs significantly and libraries and universities are not set up to provide these services themselves in any substantial way."*

*"Gold open access is not a choice for our members... they cannot cover the cost of authors for the fees needed. Green access is great but it will be hard convincing the faculty to cooperate."*

### Further Comments from

#### Others in the Industry

*"OA adds complexity to the information landscape, but it is only one of many forces acting centripetally. That complexity means libraries become more, not less, important."*

*"Downward pressure on publisher revenues and profitability due to increased competition may cause*

*churn in the market... not necessarily a bad thing, but it will depend on how quickly publishers adapt."*

*"Unfunded OA is unsustainable. Publishing, of any sort, requires funding. Even institutional repositories have to be funded, directly or indirectly."*

## 5 OPEN ACCESS: PRINCIPLE DRAWBACKS

# 3

## APPENDIX

THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

### Method and Timing

- The survey, which was conducted using our online survey software Zoomerang, was launched on 20 February 2012. Participants were contacted by email. In some cases, Red Sage Consulting's Sarah Durrant conducted phone interviews and integrated the results into the survey tool. This variety of methodology is another reason why these papers should not be considered a definitive scientific study.
- The survey closed on 7 March 2012.

### Those Taking Part

- 141 librarians, publishers, agents/intermediaries, consortia representatives, and others associated with the information industry were invited to participate in the survey.
- Durrant used personal knowledge to develop the list of people to interview, based on her industry experience; this includes several who speak regularly at conferences and write industry articles.
- The majority of respondents in the academic librarian, publisher, and other categories were from the UK (approximately 60% of respondents); respondents in the agents and consortia category from the UK represented about a quarter of respondents.

### Response Rate

- 98 surveys were completed, resulting in an overall response rate of 70%
- The table below shows the breakdown of respondents into the above categories

Survey Response Rate Overall and by Cohort

Survey Respondents	Number Contacted	As % of All Contacts	Number of Surveys Completed	As % of Number Contacted
Academic Librarians	32	23%	26	81%
Agents & Intermediaries	31	22%	13	42%
Publishers	36	25%	28	78%
Consortia Representatives	13	9%	6	46%
Others in the Industry	29	21%	25	86%
Totals	141	100%	98	70%

### About the Survey

- An online survey was created presenting respondents with a range of questions concerning the academic information supply chain.
- We were interested in gaining both quantitative and qualitative data, and so included questions with multiple-choice response options and questions soliciting opinion-based, narrative answers.
- Some respondents elected not to answer all the questions, so the sample size varied across the survey. Nevertheless, responses were analysed with consistency. For this reason we present these papers as a "temperature check" of current opinion rather than as a scientific study with appropriate sample sizing or as a definitive result of a comprehensive market survey.

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## APPENDIX

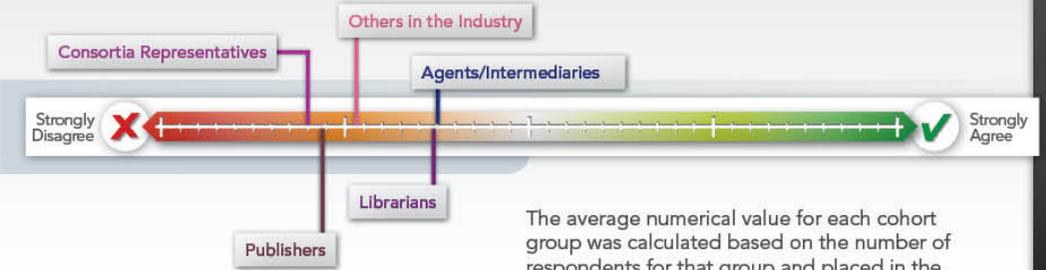
THE FUTURE OF THE ACADEMIC INFORMATION SUPPLY CHAIN

### Presentation of Results

To illustrate graphically the survey responses by cohort (librarians, publishers, agents/intermediaries, consortia representatives, and others in the industry), sliding-scale images were created (see example at right).

Average opinions by cohort are shown on a sliding scale, from strongly disagree to strongly agree. This clearly illustrates how opinions differ among cohort groups. Each response type was assigned a value:

- 1= strongly disagree
- 2= somewhat disagree
- 3= not sure
- 4= somewhat agree
- 5= strongly agree



The average numerical value for each cohort group was calculated based on the number of respondents for that group and placed in the appropriate place on the sliding scale.

### Narrative Questions

Results from narrative questions are provided in written form and are presented in this order:

- Universal themes: comments, opinions, and issues identified by individuals **in each** of the cohorts, e.g., Librarians AND Publishers AND Others in the Industry, etc.
- Specific themes: comments, opinions and issues identified by individuals **within just one** of the cohorts, e.g., Librarians OR Publishers OR Others in the Industry, etc.

### Multiple Choice Questions

Results from multiple-choice questions are presented in a visual format (e.g., a graph or chart) for clarity. They feature brief commentary that highlights trends, patterns, and significant findings **and** are comprised of all responses to the question, i.e., they are not organised by cohort (e.g., librarians, publishers, agents/intermediaries, etc.)



A series of papers  
**The Future of the Academic Information Supply Chain**

