

DIRECTORS' REPORT 2021

This is a report to the members of COUNTER on the organization's activities in 2021 and the financial report for 2021.

The logo for COUNTER, featuring the word "COUNTER" in a blue, sans-serif font. The letter "N" is stylized with a diagonal line extending upwards and to the right, resembling a checkmark or a graph line.

COUNTER

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The Code of Practice

This year, the volunteer members of COUNTER have focused on Release 5.0.2 of the Code of Practice, to make it easier for publishers and vendors to comply. We have made a full [changelog](#) available so that the community can easily track the modifications we have made. We have also updated our [Friendly Guides](#), and [online tutorials](#) are available so that they are fully synchronized with this new release.

Although the changes in it are not substantive, Release 5.0.2 signals a new, more efficient, and open method of working. It is published using [Read the Docs](#), which provides improved search and navigation functionality. Users can view the Code of Practice in PDF or HTML format and Read the Docs technology ensures these versions are always synchronized. Bernd Oberknapp from the COUNTER Executive Committee says, “We are excited about using this open-source version control system because it will make the Code of Practice so much easier to use.” Tasha Mellins-Cohen from the COUNTER Executive Committee highlights an additional change: “COUNTER will now maintain the Code of Practice on [GitHub](#), which will make the development of new releases more transparent and enable conversations around proposed amendments.”

Looking beyond version 5.0.2, the next major release of the COUNTER Code of Practice is in development. It will include more substantive changes, including improvements to open access usage metrics. We will publish a draft of Release 5.1 for consultation in 2022 to seek community feedback. We aim to publish Release 5.1 in its final form in October 2022, but will not require compliance until January 2024, to ensure sufficient time to build understanding and adaptation. This 15-month period will also give content providers and librarians time to participate in the training and guidance events we will be running.

OPEN ACCESS

COUNTER has been working with stakeholders to research and find consensus about the developing needs for reporting open access usage. We have worked with the publishers who contributed to our survey about these issues, and with librarians through a series of focus groups. We have also consulted with key stakeholders who are investigating and piloting approaches in this space, and we were delighted to invite the following speakers to a meeting of our Open Access Advisory Board:

- Max Mosterd, head of operations and analytics at Knowledge Unlatched, describing a project to assign non-attributable usage to institutions using geolocation.
- Christina Drummond, program officer for the Open Access Ebook Usage Data Trust (OAEBU), and Cameron Neylon (co-Principal Investigator with Lucy Montgomery), managing the technical R&D for the project, discussing the Pilot Data Trust for Open Access Ebooks.
- Ronald Snijder, deputy director of OAPEN, discussing a comparison of the COUNTER Release 5 reports and Google Analytics.

Understanding these projects and approaches is an important step in developing the Code of Practice. We also consulted with publishers through a survey about open access non-attributed usage in COUNTER reports. They told us that they are very interested in reporting the usage of open access which cannot be attributed to institutions. In Release 5.0.2 of the Code of Practice, we have made it easier for them to do this if they want to.

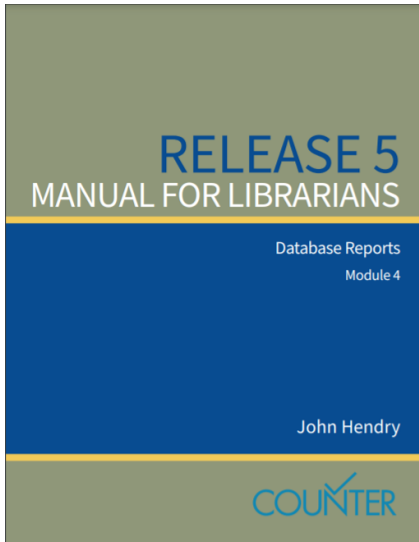
We facilitated library focus groups, and were delighted to have international participation. The libraries told us that they are interested in data about non-attributed usage, and particularly in understanding the usage of the open access articles and books they fund. This is something we will examine further in our work on Release 5.1.

Our Open Access Advisory Group was established in 2019 to guide strategic thinking in this area. The Group has met three times, once at the end of 2019 and twice in 2020. We are indebted to the following members for their insights and guidance:

Ivy Anderson, California Digital Library
Curtis Brundy, Iowa State University
Colleen Campbell, Max Planck Digital Library
Yvonne Campfens, OA Switchboard
Lori Carlin, Delta Think
Richard Gallagher, Annual Reviews
Arend Kuester, Springer Nature
Niamh O'Connor, PLOS
Patrick Peiffer, National Library of Luxembourg
Arja Tuuliniemi, National Library of Finland

THE COUNTER REGISTRY OF COMPLIANCE

Your feedback in 2019 told us how important it is for stakeholders to be able to verify whether or not a platform is COUNTER-compliant, and if so which reports are available and how to get them. Increasingly important is a single place that will enable libraries, library consortia, and intermediaries to find the SUSHI information needed to automate the gathering of COUNTER reports. We have worked with BigDigData to build a new Registry of Compliance platform to provide all this data in one place. A priority for 2022 is to ensure that the Registry is populated with up-to-date information, and we will be working with vendors and publishers to achieve this.



GUIDES AND ONLINE TUTORIALS

This year we updated our Foundation Classes and Friendly Guides to support COUNTER Release 5.0.2.

We also published two further modules in our Manual for Librarians. The manual now has the following modules:

Module 1: Journal Reports Module 1

Module 2: Book Reports Module 2

Module 3: Comparing Release 4 and Release 5 Module 3

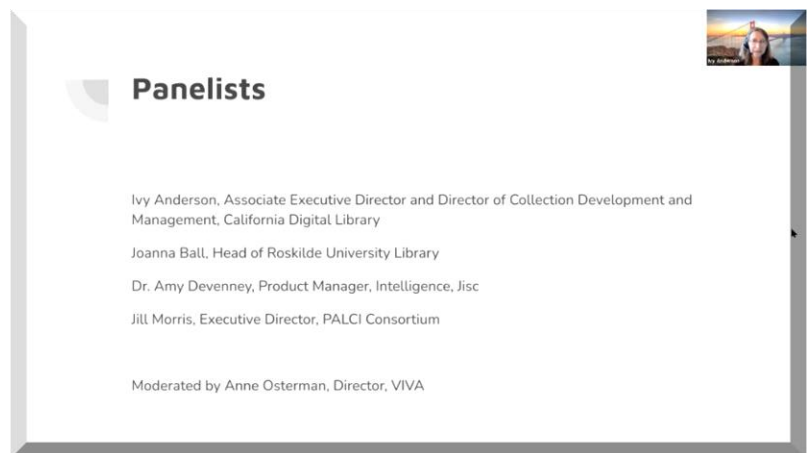
Module 4: Database Reports

We are grateful to Wiley for translating these into Japanese.

All guides can be found on our website:

<https://www.projectcounter.org/friendly-guides-release-5/>

A highlight of this year was our very popular webinar, in which an expert panel discussed how they use COUNTER usage data and their successes. They considered what next steps COUNTER should take and how the library community can support them. Our thanks to Ivy Anderson, Associate Executive Director and Director of Collection Development and Management at California Digital Library; Joanna Ball, Head of Roskilde University Library; Dr. Amy Devenney, Product Manager, Intelligence at Jisc; and Jill Morris, Executive Director of the PALCI Consortium for sharing their knowledge and insights with us. If you missed the live webinar, you can watch the recording at <https://youtube/wCITLM-B6yU>



Our Board and Committees

COUNTER BOARD DIRECTORS

Anne C. Osterman, VIVA (Chair)

Irene Barbers, Forschungszentrum Juelich

Jo Lambert, Jisc

Elisabeth Ling

Heather Loehr, Hanover College

John McDonald, EBSCO Information Services

Heather Staines, Delta Think

COUNTER EXECUTIVE COMMITTEE

David Sommer, Kudos (Chair)

Daniel Albertsson, The Swedish University of Agricultural Sciences

Irene Barbers, Forschungszentrum Juelich

John Chodacki, University of California

Jill Emery, Portland State University Library

Jacqueline Gillet, National Institute for Research in Digital Science

Kornelia Junge, Wiley

Marie Kennedy, Loyola Marymount University

Tasha Mellins-Cohen, Mellins-Cohen Consulting

Paul Needham, Cranfield University

Bernd Oberknapp, Freiburg University Library

Nicola Hayden, Royal Society of Chemistry

Jack Ochs, The American Chemical Society

Oliver Pesch, EBSCO Information Services

Alexandra Winzeler, OCLC

Harald Wirsching, Springer Nature

Elena Zapryanova-Hadjinikolova, Elsevier

TECHNICAL ADVISORY GROUP

Paul Needham, University of Cranfield (Chair)
Senol Akay, The American Chemical Society
Melissa Belvadi, University of Prince Edward Island
Andrew Goldthorpe, ABC
Ian Hayes, Atypon
Athena Hoeppe, University of Central Florida
Kornelia Junge, Wiley
Bedřich Košata, Big Dig Data
Sonja Lendi, Elsevier
Stuart Maxwell, Scholarly iQ
Bernd Oberknapp, Freiburg University Library
Oliver Pesch, EBSCO Information Services
Thomas Porquet, Couperin.org
Peter Vlahakis, ITHAKA/JSTOR
Elena Zapryanova-Hadjinikolova, Wiley

LOOKING FORWARD TO 2022

Our governance structure is supporting the development of the Code of Practice Release 5.1 and we look forward to consulting with our members about our vision for that release. We will also continue to support our work with online tutorials and guides. In 2022, we will make available our COUNTER Media Library, which will support content providers in implementing the Code of Practice, and librarians and library consortia in getting the most from their COUNTER usage reports.

OUR SPONSORS

Many thanks to our sponsors:

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[Accessible Archives](#)

[Highwire Press](#)

[Sage Publishing](#)

[Unlimited Priorities](#)

[Wolters Kluwer](#)

Financial statements for 2021

Counter Online Metrics
Company Limited by Guarantee
Income Statement
year ended 31st December 2021

	2021	2020
	£	£
Turnover	123,167	140,098
Other charges	(97,976)	(137,146)
Profit	<u>25,191</u>	<u>2,952</u>

Counter Online Metrics
Company Limited by Guarantee
Statement of Financial Position
31st December 2021

	2021	2020
	£	£
Current assets	267,918	221,899
Creditors: amounts falling due within one year	85,808	64,980
Net current assets	<u>182,110</u>	<u>156,919</u>
Total assets less current liabilities	<u>182,110</u>	<u>156,919</u>
Capital and reserves	<u>182,110</u>	<u>156,919</u>

For the year ending 31st December 2021 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476;
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of financial statements.

These financial statements have been prepared in accordance with the micro-entity provisions.

These financial statements were approved by the board of directors and authorised for issue on 2nd February 2022, and are signed on behalf of the board by:

Ms J Lambert
Director

Company registration number: 4865179

The company is a private company limited by guarantee, registered in England and Wales.

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COUNTER in 2022
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