

Optimising COUNTER for Open Access

Libraries are under pressure. They need to shift to open **and** make data-driven decisions – but OA decreases visibility and availability of trusted usage metrics. We're working to fix that.

COUNTER: A Level Playing Field

COUNTER Metrics

COUNTER is built by libraries and publishers working together to meet the needs of our whole community.

We're an open standard offering normalised metrics that can be consistently compared across publishers and over time.

Our reports show usage, not users: we're privacy protective by design.

Web Analytics

Web analytics, like those from Google, are commercial products designed to optimise for corporate needs.

They present poorly defined custom metrics that are subject to change without notice. Most are also based on sampling, not complete usage data.

User data is central: advertisers want to know who's visiting.

The Value Of Reporting OA Usage

Prove the OA Advantage

Compare apples with apples, not beachballs.

By measuring open access content against the same standard as subscription materials, COUNTER reporting helps verify claims that OA drives increased usage.

Return on Investment

Offer libraries a calculation they understand.

Just as subscription ROI is calculated by dividing annual Unique Item Requests by license fees, OA ROI is Unique Item Requests divided by OA spend - helping prove that OA is value for money.

Demonstrate Impact

Even the best metric is only a proxy...

but usage is a missing measure of impact. Citations take a long time to accrue. Altmetrics are immediate but fleeting. Usage is both direct and immediate.

TODAY: Three Ways To Report OA Usage

Global usage reports

All COUNTER reports can be delivered for global usage.

They can be broken down geographically to show regional usage, as well as by attribution.

Global reports are great for title-level impact analysis.

Granular Item Reports

Highly granular Item Reports, particularly global versions (the GIR), show article-level usage.

They're an excellent way to demonstrate article-level return on investment in OA.

You can also use them for funder reporting, and to enhance researcher impact statements.

Institutional reports

Our traditional institutional reports show usage within an institution. OA institutional reports show global usage of content that authors affiliated with the institution have published.

Fabulous to demonstrate publication-and-usage trends over time, and for negotiating library spend/funding.

TOMORROW: Best Practice For OA Reporting

We've identified five key challenges in OA reporting, and our working group developed recommendations tied to each of them.

1. **Global reporting.** OA materials are frequently accessed from outside of institutions. When paying for OA, libraries want to understand the global impact of the work.
2. **Linking metadata.** There is no current mechanism linking DOIs in COUNTER reports to a specific institution, making it difficult for publishers to report on usage of the content for which an institution has paid an OA fee (regardless of business model).
3. **Syndicated usage.** OA materials are frequently available on multiple platforms, meaning the publisher's reports will not provide a full picture of usage.
4. **Inclusion and accessibility.** Some OA publishers are very small and lack resources to make COUNTER reporting viable.
5. **Education.** COUNTER is confusing! Alongside the eventual OA best practice, we'll significantly revise and extend the Friendly Guide to OA (available at countermetrics.org/education/open-access/).

Best Practice Recommendations

Granular Global Reporting

Building on the global reporting mechanism deployed in 2019

We're recommending Global Title Reports for title-level business models like Subscribe to Open and sponsored/ 'diamond' journals. The GTR is also optimal for OA books.

For item-level business models like Read-and-Publish or APCs, the Global Item Report is preferred.

We're defining filters for ease of use – though filter by author affiliation may be complex.

Author Affiliation Metadata

Using the established Extensions protocol to add detail to reports

The Code of Practice has always allowed publishers to add more detail. We're creating a new reserved element for Affiliation_ID, to make it easier to link an author to an institution and serve up pre-filtered global reports by affiliation.

When NISO's OA Business Process working group publishes recommendations, we'll make sure we are aligned with their metadata dictionary.

Syndicated Usage Metrics

Applying the 2024 Best Practice for a holistic view of usage

COUNTER's existing Syndicated Usage guidelines identify Privacy-protective, safe ways to exchange usage data between a syndication platform and the original publisher, as well as one-click mechanisms for filtering syndicated usage out of resulting COUNTER reports.

By including syndicated usage in global reports, publishers will be able to showcase the additional value of open licenses for disseminating scholarship.

Inclusion Via The Pathway

The new Pathway To Compliance lowers technical barriers

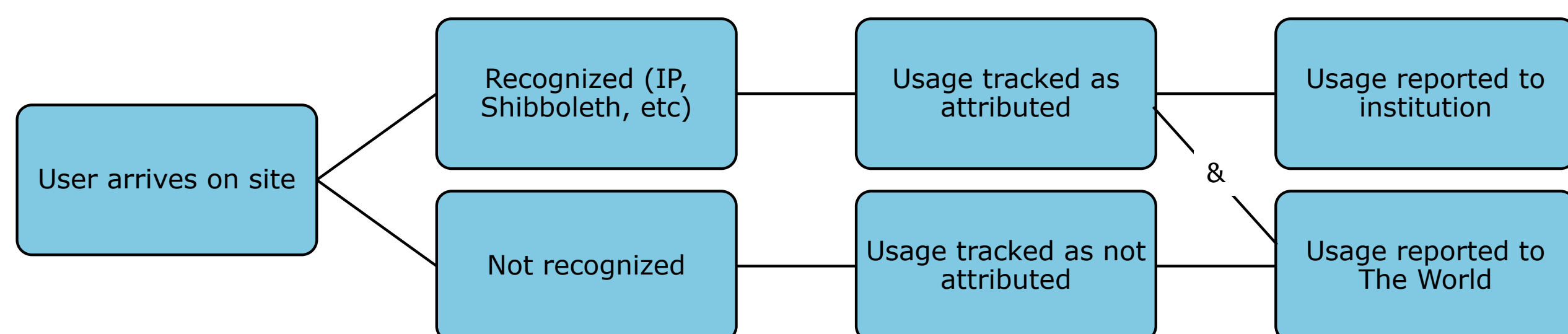
Our recently published Pathway to Compliance provides a practical, stepwise route for small publishers to start offering COUNTER reporting that will benefit them and their library customers.

Pathway publishers offer fewer reports and can choose whether to deliver search metrics. They also have a choice of report formats, flexible reporting frequency, and technical verification without audit to reduce friction.

Attribution: Global Usage

Most publishers can't link all of their usage to an institution, so instead it gets attributed to '**The World**'. By adding together all of the institutional usage with The World usage, publishers can create a global COUNTER report.

How COUNTER Attribution Works



Syndication: Distributed Usage

Lots of usage happens outside of publisher platforms, in LLMs, indexing services, and tools like ResearchGate. Syndicated usage rules allow publishers to aggregate and report that data for a comprehensive picture of usage activity.

Syndicated usage applies to all publishers (think of abstracting and indexing services!) but is particularly important for OA content, which is frequently syndicated in full-text.

Key Aspects:

- **What can be shared:** Syndication platforms, including AI systems, can share raw data, or global reports.
- **Sharing routes:** Syndicators can share raw data with publishers. Publishers and syndicators can share processed data with libraries.
- **Why share:** For publishers, syndicated usage data helps demonstrate ROI. For libraries, it gives a fuller picture of research impact.

Have Your Say

Full consultation at countermetrics.org/oa-consultation or scan the QR code to participate.

