

Class 8

Release 5  
Understanding the use of  
Open Access Content

## Open Access Content in COUNTER Reports

This tutorial  
explains how  
COUNTER reports  
identify use of open  
access content.

## Gold open access

The open access status of articles and books often requires the payment of a publication fee to the publisher.

This fee is called an Article Processing Charge, usually shortened to 'APC'.

This process is often called Gold open access, or Gold OA.

There are other types of open access, but not relevant to these metrics

## Access\_Type

This is the COUNTER attribute used to determine whether content is open access or not.

It allows usage of subscribed content to be counted separately from open access content.

## There are two Access\_Types

**Controlled:** means that at the time of the usage the content item was not open because it was behind a paywall and access was restricted to authorized users.

**OA\_Gold:** means at the time of the usage the content item was available under a gold open access license - that is immediately and permanently available as open access.

# Hybrid journals

It is particularly important to separate Access\_Types when understanding usage of hybrid journals.

These are subscription journals in which only some of the articles are open access.

# A few points to note

Access of content due to a trial subscription or license is considered Controlled.

Content that has been made freely available but is not OA\_Gold, for example free for marketing purposes, is considered Controlled.

Content items offered as open after an embargo period are currently considered Controlled.





## Another point to note:

OA\_Gold usage may be incomplete.

This is because there is no access control, and so publishers of fully open access journals will not always know where usage is coming from.



# Master Reports and Standard Views

Usage of Gold Open Access articles is **included** in the Title Master Reports.

Usage of Gold Open Access articles is also **included** in some of the Standard Views, e.g. **TR\_J3** for journal usage and **TR\_B3** for book usage.

This is useful if you want to see what proportion of usage from Hybrid journals is from OA\_Gold articles and what proportion is from articles funded by subscription.

# Master Reports and Standard Views

You'll have noticed that some of the Standard Views, such as the **TR\_J1** report **exclude** usage of Gold Open Access content.

This is because when evaluating hybrid journals, many librarians prefer to count only the usage of articles funded by subscription.

# Scenario 1

Camford subscribe to Journal X at a cost of £25,000 in 2018.

Barbara, the librarian, wants to calculate the cost per Unique\_Item\_Request.

She wants to exclude the use of OA\_Gold because the costs of OA\_Gold are not covered by the subscription.

She runs the **Standard View TR\_J1** which **excludes** OA\_Gold articles and her calculation is:

$$\text{£25,000} \div 60,000 = \text{£0.42 per Unique\_Item\_Request}$$

## Scenario 2

Barbara is also interested to know what the total usage was in 2018, and how much of that usage was for OA\_Gold articles.

She runs the **Standard View TR\_J3**.

This shows:

- Access\_Type: Unique\_Item\_Requests / Controlled:  
**60,000**
- Access\_Type: Unique\_Item\_Requests/OA\_Gold:  
**7,000**

## Scenario 2

Barbara compares cost per Unique\_Item\_Request for Controlled only, with the total usage for both Access Types:

- $£25,000 \div 60,000 = £0.42$  per Unique\_Item\_Request (Controlled access only)
- $£25,000 \div 67,000 = £0.37$  per Unique\_Item\_Request (Controlled and OA\_Gold access)



## Fully Open Access Journals and book platforms

In fully open access journals or book platforms, all content is OA\_Gold.

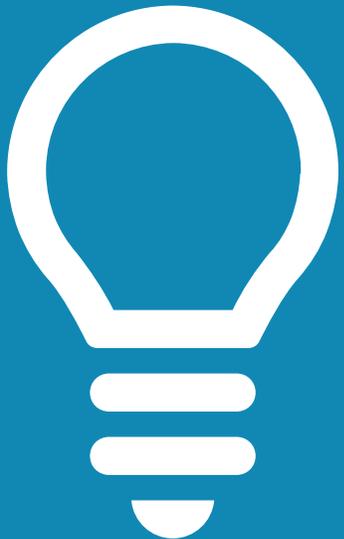
Because there is no access control, publishers of fully open access content will not always know where usage is coming from.

Where it is not possible to identify usage by individual institutions, the usage is attributed to “**The World**”, and this appears in the cell usually used for Institution.

	A	B	C
1	Report_Name	Title Master Report	
2	Report_ID	TR	
3	Release		5
4	Institution_Name	The World	

# Looking ahead

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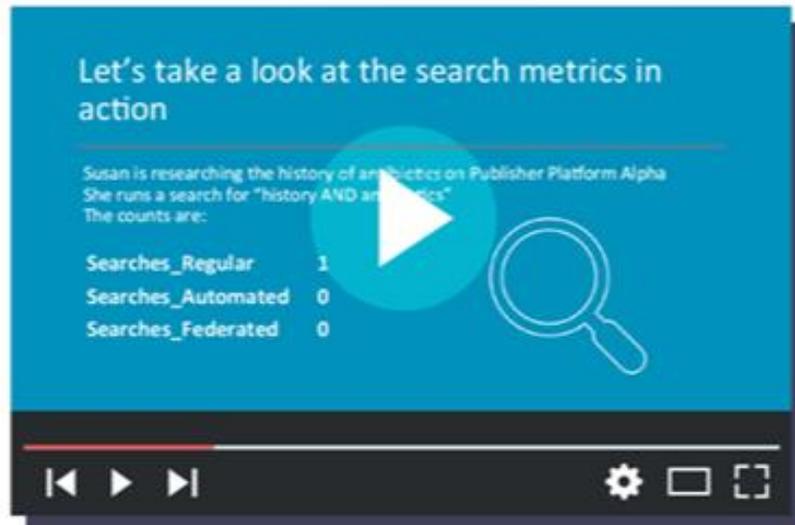


Many librarians have told us that it would be useful to know about the usage of articles that publishers make openly available following an embargo period.

COUNTER is consulting with all of its community about the introduction in Release 5.1 of the Code of Practice, of a metric currently described as OA\_Delayed.

# Learn More

Visit our COUNTER YouTube Channel where you will find more Foundation Classes and download our Friendly Guide



## THE FRIENDLY GUIDE TO RELEASE 5 FOR LIBRARIANS

This guide is a non-intimidating manual for librarians.

Tasha Mellins-Cohen

COUNTER