Class 8

Release 5
Understanding the use of Open Access Content
This tutorial explains how COUNTER reports identify use of open access content.
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.
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.
**Access_Type** separates usage of gold open access articles from controlled (subscribed) content.
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.
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.
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:

\[ \frac{£25,000}{60,000} = £0.42 \text{ per Unique Item Request} \]
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
Barbara compares cost per Unique_Item_Request for Controlled only, with the total usage for both Access Types:

- £25,000 ÷ 60,000 = £0.42 per Unique_Item_Request (Controlled access only)
- £25,000 ÷ 67,000 = £0.37 per Unique_Item_Request (Controlled and OA_Gold access)
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.

| Institution_Name | The World | 5 |
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.
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