

RFI: Distributed Usage Logging (DUL) - Outreach Consultant

Project

[Distributed Usage Logging](#) (DUL) outreach and 'Sender/Platform' recruitment. Promoting the service and its benefits in order to solicit participation from publishers (receivers) and content-hosting platforms/scholarly collaboration networks (senders).

Crossref provides the infrastructure for DUL, in order that a 'sender' can discover the correct reporting endpoint for the owner of a DOI (digital object identifier). The call for participation is being led by COUNTER and the selected consultant will be representing COUNTER, with additional support from Crossref.

Background

The Crossref Distributed Usage Logging initiative has been underway since 2017 with a working group comprised of Crossref, COUNTER, publishers and platform providers, reference managers/reading/sharing environments. DUL provides a private peer-to-peer channel for the secure exchange and processing of COUNTER-compliant private usage records from hosting platforms (senders) to publishers (receivers) without the need to negotiate bi-lateral arrangements. All data provided back to the original publisher is anonymized, preserving individual user privacy. The system has been tested by several members of the working group and is now production ready.

Mendeley, a free reference management service and an academic social network, is the first Platform to use DUL, and is ready to send usage data to receivers. Atypon, who provides an online publishing platform to more than 200 customers, will begin testing in February with its publisher clients Wiley and Taylor & Francis. Atypon will also be setting up its own Scitrus platform to be a Sender.

- [DUL proof of concept reference implementation](#) of the end-to-end transaction pipeline with validation credentials
- [DUL reference manual](#) documenting technical specifications and the security infrastructure, also including supplementary materials: FAQs, best practices, reference implementation details, and reference works

For DUL to be a success it will need a critical mass of both Senders and Receivers. Both Senders and Receivers will need to agree to a set of participation guidelines. Senders will also need to meet certain criteria, and once approved will be added to a list of approved Platforms maintained on the COUNTER website.

As for all products and services developed with Crossref, each needs a business and service model to ensure that it's sustainable for all parties.

Timeframe

The contract will run for six months from, approximately, 30 March 2020 with a possible extension of a further three months after review.

RFI responses [can be submitted here](#).

RFI response deadline:	23:59 (UTC) 08 March 2020
Consultant selected and notified:	13 March 2020
Contract:	For 6 months starting, approximately, 30 March 2020
Final report and review meeting:	25 September 2020
Extension decision:	02 October 2020

Budget

The outreach project has funds of US\$50,000 for the first six months, which includes an estimated \$8,000 total for marketing materials, travel, and COUNTER website development. A three month extension will be considered after completion of a DUL Outreach Report, based on the initial success criteria, to develop a business and service model.

Phase 1 senders

The first phase of the project is to engage with the platforms that are signed up to [STM Voluntary Principles for Article Sharing](#), and are therefore considered the most amenable to joining DUL as Senders.

Phase 2 senders

A further group of platforms have not yet signed up (and may not sign up) to the STM principles, but have been contacted or suggested during market research as sites of interest.

Finally there is an additional group comprised of institutional repositories, subject-specific repositories and aggregated databases.

Required outcomes

- Refine or develop Outreach and On-boarding materials for both Senders and Receivers
- Confirm criteria for Senders and Receivers inclusion in DUL
- Engage with all Senders on the Phase 1 list to test the value proposition, evaluate their DUL-relevant content, their understanding of and readiness for COUNTER compliant reporting, and confirm their participation
- Engage with interested Receivers (and their hosting platforms, such as Atypon) to test the value proposition, their technical readiness, confirm their participation and encourage/track inclusion of DUL endpoints in their Crossref metadata records
- Develop a communication plan for formal launch
- Assess, through discussion with Receivers, willingness to contribute to a business and service model to ensure that DUL is sustainable for all parties

Additional Resources

- [COUNTER's Distributed Usage Logging stakeholder demand report](#)
- [COUNTER Code of Practice v5](#) compliance requirements for processing and reporting data from non-publisher usage sources