

November 26 , 2019

COUNTER Release 5 Transition: A Community Call for Compliance

We write as representatives of the international academic library community to urge library content providers to prioritise and expedite a transition to Release 5 of the COUNTER Code of Practice, which became effective in January 2019.

COUNTER's members contributed to the development of Release 5 (R5) of the COUNTER Code of Practice, which enables content providers to produce consistent, comparable and credible usage data for online content. This allows librarians and others to compare the usage data they receive, and to understand and demonstrate the value of the electronic resources to which they subscribe.

Those providers offering usage data solely under Release 4 of the Code of Practice are no longer COUNTER compliant. Compliant COUNTER Release 5 providers are listed on the COUNTER website. As a community that licenses content from a wide range of providers, COUNTER Release 5 compliance by all our providers is critical to informing decisions and stewardship of our funds.

Release 5 reduces the complexity of the Code of Practice and offers a number of improvements:

- Greater consistency in report layout and between different formats
- More consistency in vocabulary and terminology
- Fewer reports and metric types but greater flexibility to compare and combine
- Flexibility to access standard reports that meet common use cases in addition to reports that can be filtered to meet highly specific use cases

We recognise the challenges in supporting compliance and acknowledge that, for some, scheduling the work required for transition has been a challenge. However, we encourage all providers to recognise obligations to their customers and request implementation of Release 5 as soon as possible to regain COUNTER compliant status, a requirement detailed in many content agreements.

As soon as possible, non-compliant providers should:

1. Prioritise development of a COUNTER 5 service and communicate publicly your expected service release date
2. Sign the declaration of COUNTER compliance: <https://www.projectcounter.org/appendix-c-vendoraggregatorgateway-declaration-counter-compliance/>
3. Schedule a COUNTER audit

If you are currently developing a service but not yet COUNTER Release 5 compliant, there are free resources to support you in the transition, including the COUNTER R5 validation tool, available here: <https://www.projectcounter.org/validation-tool-preview/>

Several community-founded initiatives and services have developed to support libraries in working with COUNTER-compliant usage data, including Jisc's well-established JUSP service and the more nascent international CC-PLUS initiative. Jisc's JUSP service collects COUNTER usage data from providers on behalf of participating libraries and presents those statistics for viewing via an online portal. The CC-PLUS project is modelled on JUSP, and is actively developing a free, open source consortial platform for harvesting, storing, and analysing this usage data at scale. The JUSP and CC-PLUS teams, strong advocates for standards-based usage data, recognise the value of shared approaches to development and have been working with a broad range of suppliers to support their move to R5.

The signers of this statement invite all publishers to complete the recommended steps above and to get in touch with COUNTER <https://www.projectcounter.org> or JUSP <https://jusp.jisc.ac.uk> for help or advice.

Sincerely,

Jisc, SCONUL, RLUK, COUNTER, and the CC-PLUS Steering Committee

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Anna Vernon, Head of Licensing, Jisc Collections



Ann Rossiter, Executive Director, SCONUL



David C Prosser, Executive Director, RLUK



Lorraine Estelle, Director, COUNTER



Jill Morris, Executive Director, PALCI and Project Director, CC-PLUS



Kirsten Leonard, Executive Director, Private Academic Library Network of Indiana (COUNTER member)



Agnès Ponsati, Director Spanish National Research Council Library and Archives Network



Danielle Cunniff Plumer, Statewide Resource Sharing Administrator,
Texas State Library and Archives Commission (COUNTER member)

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Elijah Scott, Executive Director
Florida Academic Library Services Cooperative



Gwen Evans, Executive Director
OhioLINK, The Ohio Library and Information Network



OhioLINK
An **OH·TECH** Consortium Member

Lia Ollandezou, Coordinator, Steering Committee for Electronic Resources
HEAL-Link, Hellenic Academic Libraries Link

Hellenic Academic Libraries Link



Cynthia Holt, Executive Director, Council of Atlantic University Libraries / Conseil des bibliothèques universitaires de l'Atlantique (CAUL-CBUA)



**Council of Atlantic
University Libraries**
**Conseil des bibliothèques
universitaires de l'Atlantique**

Mark Sutherland, Executive Director, CAUL



Jennifer O. Keohane, Executive Director, Connecticut Library Consortium (CLC)

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Carla Urban, Interim Director, Cooperating Libraries in Consortium (CLiC)



Susan Haigh, Executive Director, Canadian Association of Research Libraries



Mary Lee Kennedy, Executive Director, Association of Research Libraries



Wilma van Wezenbeek, Chair Dutch Library consortium UKB



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Astrid Verheusen, Executive Director, LIBER



Jaime McCowan , Acting Chief Executive Officer, CAVAL LTD



Pamela Jones, Executive Director, CNY (ConnectNY), Inc.



Clare Appavoo, Executive Director, Canadian Research Knowledge Network



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Joana Novais, Manager, Online Knowledge Library / b-on



Further organisations wishing to add their name to this letter are welcome to contact Jill Morris at PALCI (jill@palci.org) and Jo Lambert at Jisc (jo.lambert@jisc.ac.uk).