

# Best Practice on Syndicated Usage

**This best practice guidance was updated by the COUNTER Executive Committee in October 2024 and applies to content that is syndicated and available on multiple platforms.**

## Who can share syndicated usage

- Both the syndication platform and the original publisher **MUST** be independently audited as COUNTER-compliant.
- We recommend that usage metrics be shared from the syndication platform back to the original publisher.

## Global reporting

- The syndication platform **SHOULD** send global usage data, either as raw data or as a Global Item Report to the original publisher (i.e. all usage, whether attributable to an institution or not).
- The syndication platform may deliver global reports directly to report consumers when these are requested.
- If the syndicated platform offers global usage reports directly to report consumers, it **SHOULD** share information with the original publisher about when global COUNTER reports are being called for the syndicated content.
- The original publisher may deliver aggregated global usage reports (i.e. their own global reports plus the global usage from syndication platforms) but **MUST** clearly mark the platforms on which usage occurred in the Platform field using the namespace SYNDICATED:{platform name}, so that syndicated usage can be identified and excluded when creating a Standard View from a COUNTER Report.

## Institutional reporting

- Institutional reports **MUST** only be shared where the syndication platform and the original publisher can guarantee that the authentication identifiers match exactly. Acceptable matches include
  - OpenAthens or Shibboleth sign-ins that can be very specifically tied to one institution are acceptable
  - IP ranges where the syndication platform and original publisher share an IP database.
  - Syndication platforms delivering the IP addresses used to access syndicated content as part of the raw usage data sent to the original publisher, provided this can be done without breaching privacy regulations, such that the original publisher can use their own IP database to attribute the syndicated usage to institutions.

- GetFTR, which shares the original publisher's internal Customer/Institution ID with the syndication platform as part of the entitlement check process.
- Institutional reports **MUST NOT** be shared based on 'best-guess' institutional matching where the syndication platform and original publisher have different IP databases.

### **What syndication platforms can do with institutional reports**

- The syndication platform may deliver institutional reports directly to report consumers when these are requested, provided there is a clear notification on their report interface that this usage information is also available from the original publisher.
- If the syndicated platform offers institutional usage reports directly to report consumers, it **SHOULD** share information with the original publisher about when COUNTER reports are being called for the syndicated content, and by which institutions.

### **What original publishers can do with institutional reports**

- The original publisher **MUST** clearly mark the platforms on which usage occurred in the Platform field using the namespace SYNDICATED:{platform name}, so that syndicated usage can be identified within COUNTER Reports and excluded when creating a Standard View from a COUNTER Report.
- The original publisher **MUST** allow syndicated usage to be excluded from their global and institutional reports in tabular format. The next breaking release of the Code of Practice will include a change to the COUNTER API (formerly sushi) to create a new Report\_Attribute which will permit similar exclusion there.