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# License Agreement Data Specifications

This document describes a set of minimal data requirements for establishing a systematic, standardized and mutually beneficial exchange of data concerning negotiation and monitoring of journal license agreements. The main goal of this is to achieve a regulated transfer of necessary data through machine readable formats and predetermined update intervals.

For questions and comments please contact:

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## Important:

*Please note that this description represents a bare minimum of data and metadata. This is important both in terms of universal applicability and ease of implementation. Additional metadata, lists and reports may also be of interest and could be provided in an appendix.*

## 1. Journals - Title Lists

- **Deliverable:** Complete and current lists of journals relevant to the agreement.
- **Frequency:** Monthly (quarterly as a minimum).
- **Delivery method:** An up-to-date API is the preferred form of delivery, to enable automated retrieval. Alternative options are KBART/standardized Excel/standardized CSV files by email or through an up-to-date dashboard.

### 1.1 Required fields

- 01 Publisher name
- 02 Imprint
- 03 Journal owner (a society, the publisher, etc.)
- 04 Customer name (consortium/institution/etc. where relevant)
- 05 Journal title
- 06 Journal ID (publisher's own journal id, needs to be persistent and non-missing)
- 07 Print ISSN
- 08 Online ISSN
- 09 Journal business model/access type (e.g. hybrid, gold, subscription)
- 10 Agreement reading rights (yes/no)
- 11 Agreement publishing rights (yes/no)
- 12 Year historic journal content available from (historic journal content coverage starts)
- 13 APC list price (where relevant)
- 14 Subscription list price (where relevant)
- 15 Currency

## 2. Journals - Core Holdings (Core Subs - Where relevant)

- **Deliverable:** Current lists of participating institutions core holdings.
- **Frequency:** Annually, beginning of each year.
- **Delivery method:** An up-to-date API is the preferred form of delivery, to enable automated retrieval. Alternative options are KBART/standardized Excel/standardized CSV files by email or through an up-to-date dashboard.

### 2.1 Required fields

- 01 Publisher name
- 02 Institution name
- 03 Journal title
- 04 Journal ID (publisher's own journal id, needs to be persistent and non-missing)
- 05 Print ISSN
- 06 Online ISSN
- 07 Journal business model/access type (e.g. hybrid, gold, subscription)
- 08 Journal owner (the publisher, a society, etc.)
- 09 Currency
- 10 Subscription price
- 11 Open Access Price Adjustment (in case of hybrid journals)
- 12 Invoice Amount
- 13 PCA from (year)
- 14 PCA to (year)

## 3. Usage – COUNTER

- **Deliverable:** COUNTER Release 5 reports are to be provided on an institution level and consortium level (where relevant). COUNTER reports should cover OA and non-OA content and item reports on an article level.
- **Frequency:** Automated retrieval
- **Delivery method:** A SUSHI API for automated report harvesting should be in place. Optionally, Excel or CSV files should be available on request.

### 3.1 COUNTER Reports

- TR J4 (Journal Requests by YOP - Excluding OA Gold and Including OA Gold)
- TR J3 including YOP (Journal Usage by Access Type)
- IR A1 including YOP (Journal Article Requests - Unique Item Requests)

## 4. Research Articles - Publication Lists

- **Deliverable:**
  - In case of an existing Open Access Agreement or Transformative Agreement, the publisher should provide a monthly updated list of submitted and published research articles.
  - If no prior OA/TA agreement, lists of research articles from relevant institutions published the last 3-5 years (provided by both parties, if possible).
- **Frequency:** Automated retrieval

- **Delivery method:** An up-to-date API is the preferred form of delivery, to enable automated retrieval. Alternative options are standardized Excel/standardized CSV files by email or through an up-to-date dashboard.

#### 4.1 Required fields

- 01 Publisher name
- 02 Publication date (first or online)
- 03 Article acceptance date (editorial acceptance)
- 04 Agreement approval/allocation date (when institution approves article as part of agreement)
- 05 Manuscript submission date
- 06 Article type (e.g. original paper, review article, etc.)
- 07 DOI
- 08 Article title
- 09 Journal title
- 10 Journal ID (publisher's own journal id, needs to be persistent and non-missing)
- 11 Print ISSN
- 12 Online ISSN
- 13 Journal access type (e.g. hybrid, subscription)
- 14 Article Open Access type (e.g. hybrid, gold, closed)
- 15 Currency (where relevant)
- 16 APC list price (where relevant)
- 17 Invoice amount (where relevant)
- 18 Article license (where relevant)
- 19 Corresponding author name
- 20 Corresponding author email
- 21 Corresponding author ORCID (where available)
- 22 Paying/Corresponding institution name
- 23 Paying/Corresponding institution ID (standardized internal ID, GRID, ROR, Ringold, etc.)
- 24 Funder ID (where relevant)
- 25 Funder name (where relevant)
- 26 Grant ID (where relevant)
- 27 Agreement workflow status (e.g. pending, approved, cancelled, etc.)
- 28 Journal/Editorial workflow status (e.g. pending, accepted, rejected, etc.)
- 29 Article peer-reviewed (yes/no)