

# First steps with the DEAL Cost Modeling Tool



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The DEAL Cost Modeling Tool is an interactive tool that gives universities, research institutions and their libraries the ability to project their medium-term expenditure developments with the publishers Wiley and Springer Nature, on the basis of real-data trends in various scenarios, and to compare these trend lines with their individual DEAL agreement costs.

To make it easier to get started with the Tool, here we have compiled some basic information about its options and use.

## Overview

The DEAL Cost Modeling Tool is available in two editions, one for each publisher contracted by DEAL, Wiley and Springer Nature. Each Tool comprises five tabs:

ReadMe	Introduction tab, with background information and basic details of the Tool.
Methodology	Explanation of data sets and calculation methodology used in the Tool.
Settings	Step-by-step instructions for data input and variable selection.
Group Projections	Visualization of projections at the national or state level, based on the input values selected in the Settings.
Institutional Projections	Visualization of institutional projections, based on the input values selected in the Settings.

## How to use the DEAL Cost Modeling Tool. A few examples...

- **Find out about the Germany-wide publishing and cost trends. How many articles were published in the journals of Wiley and Springer Nature in the past years? How many articles were published in subscription and open access journals? What do the current publication trends mean for the future? Moreover: for the first time, obtain reliable data on the development of hybrid open access publishing (without transformative agreements, i.e. “double dipping”) in the years prior the DEAL agreements.**

**How does it work?** You can find the publication data for Germany on which the tool is based, for each publisher, in the “Methodology” tab.

- **Based on average publication costs, estimate national- and state-level expenditure development under the conditions of the previous status quo (= with no DEAL agreement, i.e. conventional subscriptions fees for libraries and open access publishing costs paid on top) and compare it with expenditure development under DEAL conditions.**

**How does it work?** Learn about the data and trends of the costs of open access publishing in Germany in the “Methodology” tab. By default, the “Group Projections” tab displays the trend of publishing costs for Germany based on this data as a “status quo scenario”. The red trend line depicts the overall (national or state) expenditure under the DEAL agreement terms. Above the projection visualizations, you can select the option to see projections for individual states.

- **Project medium-term costs for your institution under the conditions of the previous status quo (= with no DEAL agreement, i.e. conventional subscriptions fees for libraries and open access publishing costs paid on top) and compare it with expenditure development under DEAL conditions.**

**How does it work?** Enter your institution’s data from your 2020 DEAL PABA statement in the “Settings” tab, as well as your subscription expenditure with the respective publisher from the years prior the DEAL agreement. The “Institutional Projections” tab then displays the cost development at status quo conditions between 2015 and 2025. The red trend line corresponds to the expenditure of your institution under DEAL agreement conditions, and the shaded area highlights either the costs avoided by DEAL or possible funding gaps.

- **Calculate the mid-term spending reduction or any funding gaps expected for your institution under the conditions of the DEAL agreements, with respect to the previous status quo.**

**How does it work?** The lower section of the “Institutional Projections” tab provides a bar chart of annual and cumulative expenditure savings or funding gaps.

- **Compare DEAL agreement expenditure to cost scenarios for service levels similar to those provided by DEAL but under the existing status quo terms (for example, an expansion of access rights and/or more OA publications without a DEAL agreement).**

**How does it work?** For both Group and Institutional Projections, four scenarios can be selected in the upper area of the tab, in addition to the preset status quo:

- Access to all journals (40% increase in subscriptions)
- 70% Open Access by 2025 (BMBF target)
- 100% Open Access
- 100% Open Access and access to all journals

The cost scenarios are described in detail in the “Settings” and “Methodology” tabs.

- **Adjust parameters such as subscription coverage and OA publication target to match your institution-specific strategy, and evaluate your projected spending under these conditions in relation to costs under the DEAL agreements.**

**How does it work?** The projection parameters in the “Settings” tab can be adjusted individually:

- Annual article output growth rate
- Annual subscription fee price increase
- Non-subscribed journals (portfolio access gap in %)
- 2025 target for open access annual article output

>> This document is an introductory guide to the DEAL Cost Modeling Tool. If you need further assistance in working with the Tool, please contact [support@mpdl-services.de](mailto:support@mpdl-services.de).