### **Central Publication Cost Reporting**

openCost – The Road to Publication Cost Transparency – The Next Stage

Lisa-Marie Stein Regensburg, 9 October 2024







### **Agenda**

#### Welcome!

### 1 Publication cost reporting at the University of Regensburg

Cornelia Lang

#### 2 Publication cost reporting at DESY

- Workflow
- Publication cost module
- Examples:
  - Gold-OA
  - Hybrid-OA
  - Gold-OA transformative
  - Hybrid-OA transformative
  - EZB as reference and support

#### 3 Hands-on!

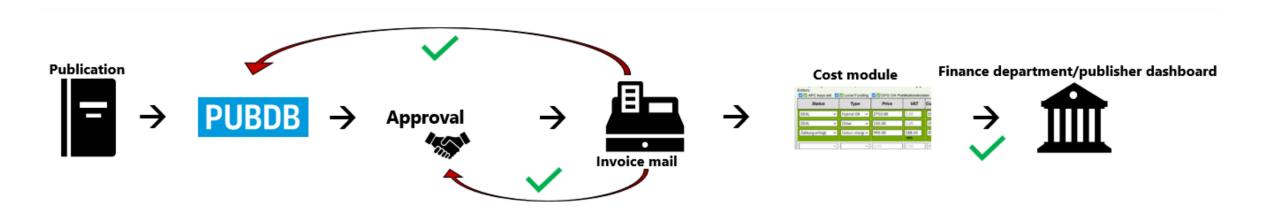
- Topic catalogue
- Questions to be discussed
- Materials & exchange
  - Including glossary of publication cost types



# Publication cost reporting at the University of Regensburg

### **Workflow DESY library**

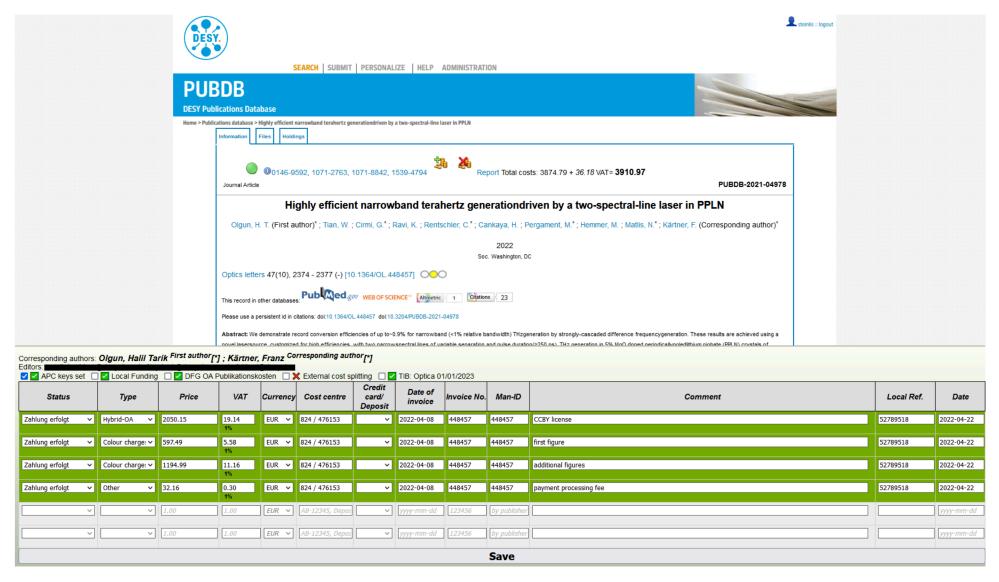
- Recording of all publications in DESY Publications Database (PUBDB = institutional repository)
- Helmholtz guideline: 100% Open Access
- Approval for publication
- Central reporting of all publication costs in publication cost module, integrated in publication record



#### **Publication cost module**

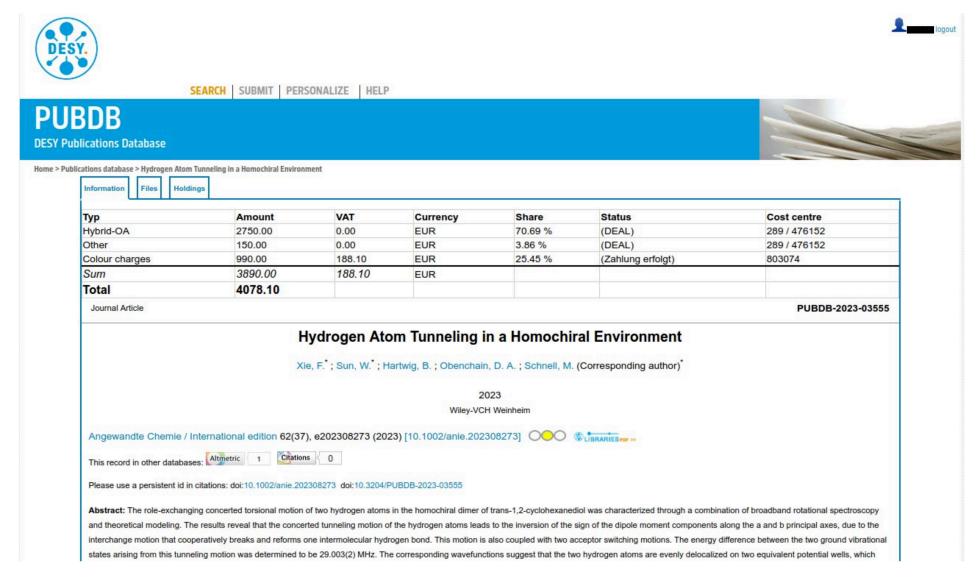
- Within the repository:
  - Repository software INVENIO 1
  - Bibliographic data format: MARC 21
  - Shared infrastructure JOIN<sup>2</sup>
- Relevance of all cost types & DESY Library always responsible: open, hybrid, closed access
- JOIN<sup>2</sup>: **Common** definitions (configurable, but convergence)
- Aggregations & Reporting

#### **Publication cost module**



display for library staff

#### **Publication cost module**



display after login

#### **Publication cost module**

#### Fields:

- Status
- Type
- Price
- VAT
- Currency
- Cost centre
- Credit card/Deposit

- Date of Invoice
- Invoice No.
- Man-ID
- Comment
- Local Ref.
- Date



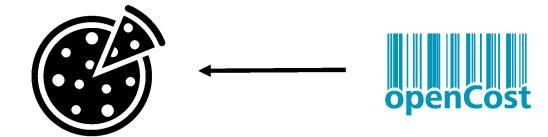
Local Funding DFG OA Publikationskosten External cost splitting



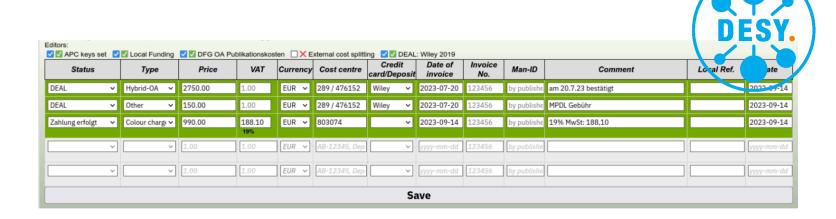
Transformative agreement

Publication cost module in openCost context

- openCost compatibility
- Standardisation by openCost
- **JOIN**<sup>2</sup> **dynamics**: verification of the openCost project model due to the diversity of contributors

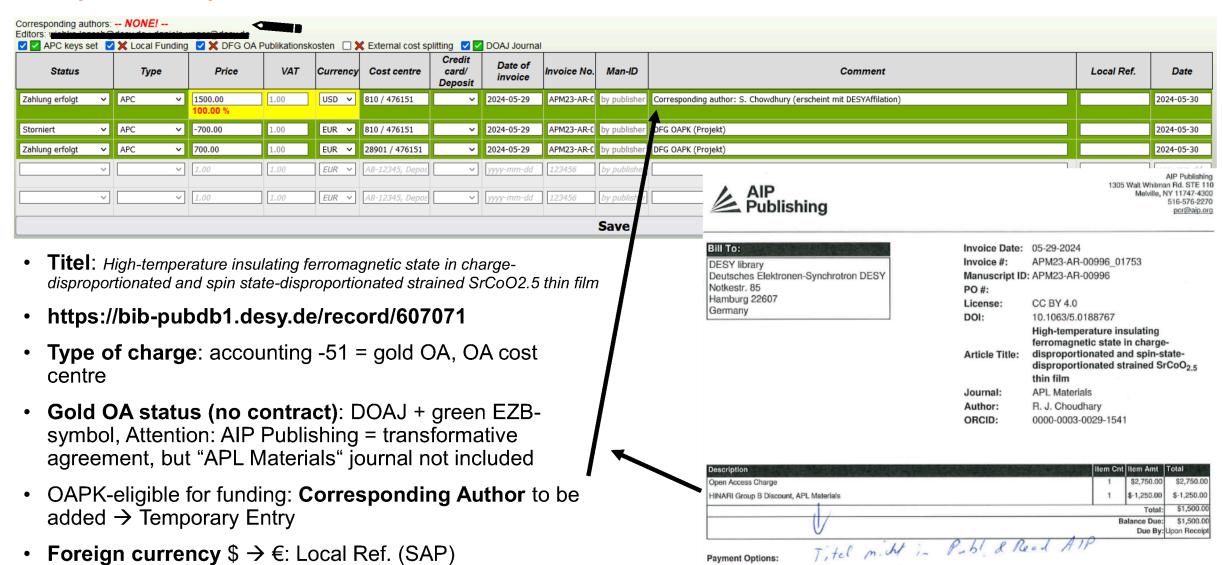


exchange format



internal format

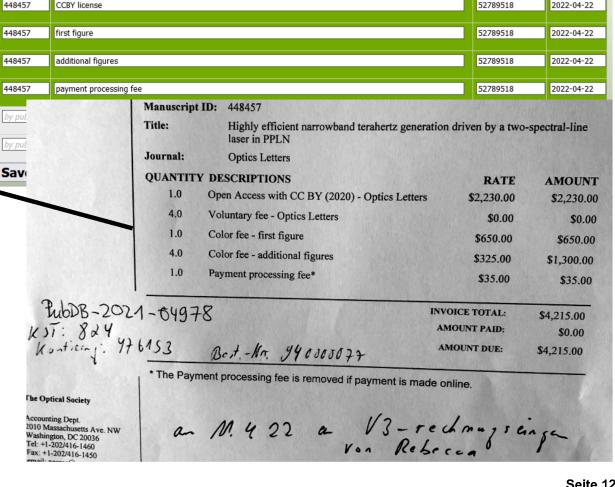
#### **Example: Gold Open Access**



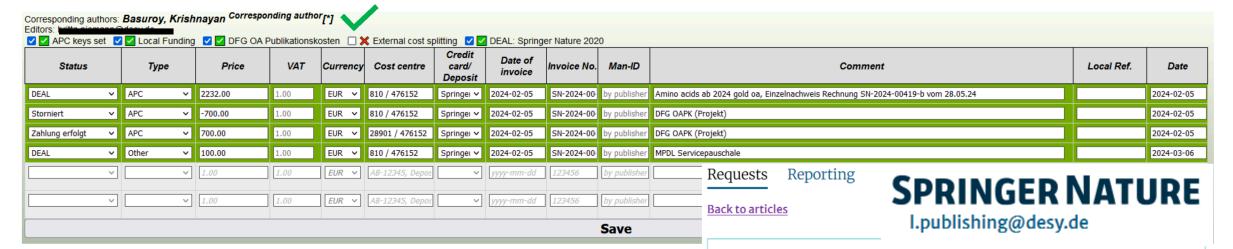
#### **Example: Hybrid Open Access**



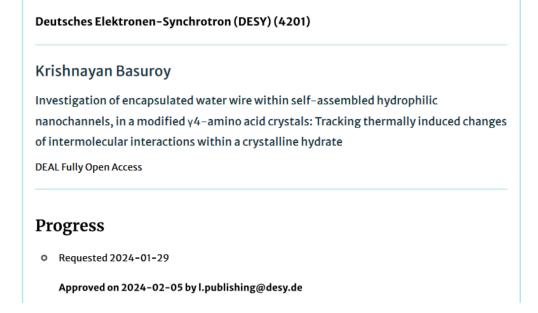
- **Titel**: Highly efficient narrowband terahertz generationdriven by a two-spectral-line laser in PPLN
- https://bib-pubdb1.desy.de/record/472306/
- **Different types of charge:** hybrid OA, colour charge, payment fee (formerly "other")
- **Hybrid OA**: accounting -53, cost centre of the DESY group, not eligible for OAPK funding
- Foreign currency \$ → €: Local Ref. (SAP)



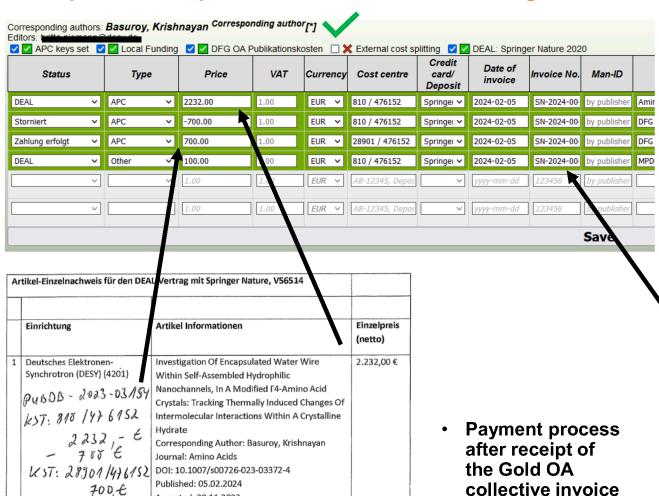
#### **Example: Gold Open Access transformative agreement**



- **Titel**: Investigation of Encapsulated Water Wire Within Self-Assembled Hydrophilic Nanochannels in a Modified Gamma4-Amino Acid Crystals: Tracking Thermally Induced Changes of Intermolecular Interactions within a Crystalline Hydrate
- https://bib-pubdb1.desy.de/record/584603
- Different types of charge: gold OA = APC, other = MPDL service fee
- DEAL: accounting -52 = transformative, OA cost centre, dashboard confirmation
- OAPK-eligible for funding: 700 € DFG cost centre



### **Example: Gold Open Access transformative agreement**





Deutsches Elektronen-Synchrotron (DESY) Zentralbibliothek

Notkestr. 85 22607 Hamburg

l.order@desy.de

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AG München, HRB 244423

Sitz: München

Geschäftsführer:
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Kontakt für Rückfragen zur Rechnung: Accounting-Team

accounting@mpdl-services.de

Bitte stets Kunden- und Rechnungsnummer

ingeben!

UniCredit Bank AG (HypoVereinsbank) IBAN: DE16 7002 0270 0038 1447 15

BIC: HYVEDEMMXXX

Rechnung

Rechnungsnummer: SN-2024-00419-b

Kundennummer: K10446

Teilnahmevertragsnummer: V56514 Rechnungsdatum: 28.05.2024

Leistungszeitraum: 04.01.2024 - 14.03.2024

Fälligkeit: 27.06.2024

(quarterly)

Wir erlauben uns folgende Positionen in Rechnung zu stellen:

Pos.	Anzahl	Leistungsbezeichnung	Einzelpreis (netto)	USt	Gesamtpreis (netto)
1	1 LE	APC-Gebühren für Gold Open Access-Artikel in wissenschaftlichen Zeitschriften des Verlags Springer Nature Customer Service Center GmbH, Einzelnachweis s. folgende Seite	8.745,64 €	19 %	8.745,64€
7wisc	hensumm	8.745,64€			
	gesetzliche	1.661,67€			
	nungsbetr	10.407,31€			

Steuersatz	Nettobetrag	Stouerbetrag	Bruttobetrag	
19 %	8.745,64 €	1.661,67 €	10.407,31 €	
Gesamt	8.745,64 €	1.661,67 €	10.407,31 €	

Date
2024-02-05
2024-02-05
2024-02-05
2024-03-06
yyyy-mm-dd
yyyy-mm-dd

Accepted: 20.11.2023

#### **Example: Hybrid Open Access transformative agreement**



- Titel: Development of the Continuous Readout Digitising Imager Array Detector
- https://bib-pubdb1.desy.de/record/596799
- Type of charge: hybrid OA
- **IOP transformative agreement**: accounting -52 = transformative, OA cost centre, entry in cost module after receipt of publication reports
- TIB Consortium

The Total Fee (excluding any taxes) payable by the Member(s) under this Licence shall be as follows:

Year:	Read Fee:	Publish Fee:	Total Fee:
Year 1: 1 January 2022 – 31 December 2022			
Year 2: 1 January 2023 – 31 December 2023			
Year 3: 1 January 2024 – 31 December 2024			

#### **Transformative agreement:**

- Price per article?
  - IOP: blackened amounts in contracts
  - Cannot usually be reliably determined
  - Percentage tax rate PAR fees: Publish & Read
  - Special case DEAL Elsevier?

**Examples** 

EZB as reference and support: Information gathering & display in the own system

#### **EZB** extension openCost

- to include information on publishing & publication costs
  - → Institution-specific agreements: Memberships, transformative agreements, funding conditions

. . .

- → Payment of publication costs for a selected journal by a specific institution
- EZB as central information platform for libraries and researchers
- Interface to **OpenAPC** & display of OpenAPC cost information
- Workflow optimisation, web services for repositories











### **Topic catalogue**

•	Use cases	•	
•	Controversial terminology	•	
•	Cost splitting	•	
•	Value added tax		•••
•	Currency	•	•••
•	Transformative agreement	•	
•	DEAL	•	
•	Publisher's dashboards	•	
•	DFG programme: OA publication costs	•	
•	Data transfers	•	•••
•	Publication costs - where & who?	•	•••
•	Need for upskilling, advanced training?	•	
•	openCost	•	

#### Questions to be discussed

### Publication cost reporting:

- Who?
  - Scope of responsibility ...
- Where?
  - In which department? (e.g. acquisition, publications department, licence management, open access section, university press, ...)
- In which system?
  - e.g. repository, library system, OA module
- Biggest challenges?
- Wishes?
- Ideas?

### Further questions:

- •
- •
- •
- ...
- •
- •
- •
- •
- ...

#### Materials & exchange

- Interested in recurring meeting? (e.g. at central conferences or virtually)
- Existing exchange forums?
- Regular hands-on meeting as part of JOIN<sup>2</sup>
- openCost contact:
  - Website: www.opencost.de
  - Github Repository: <a href="https://github.com/opencost-de/opencost">https://github.com/opencost-de/opencost</a>
    - Metadata schema & documentation
  - Subscription to mailing list
- DESY PubDB: <a href="https://bib-pubdb1.desy.de/">https://bib-pubdb1.desy.de/</a>
- Cost-ABC: Glossary of publication cost types

# openCost Initiated in cooperation with University Library

of FAU Erlangen-Nürnberg

### Glossary of cost types

(openCost-) cost types	Potential terms on the invoice indicating the cost type keyword to be used
gold-oa ∉	charges in OA publication organs: APC, Artikelgebühren in OA-
	Zeitschriften,
hybrid-oa €	charges in hybrid publication organs: APC: Publikationen in Hybridzeitschriften,
vat	vat, Mehrwertsteuer, MwSt,
colour charge	colour charge, colour fee, colour Gebühr, color charge, colour figure, coloured figures, coloured article figures, color illustrations, color art, color pages, colour page charge, Farbseiten, Farbabbildung,
cover charge	cover charge, cover fee, cover picture, cover image, cover art, supplementary cover art, Umschlaggestaltung, Cover-Abbildung,
page charge	page charge, page fee, overlength (page) charges, excess (page) charge, Überlänge, Überlängenaufschlag,
permission	licence fee, Bildlizenz, Abdrucklizenz, Tabelle, Grafik,
publication charge	closed access related charges: publication charge, publication fee,
reprint	reprint charges for copies of published paper: reprint charges,
submission fee	submission charge, submission fee, Einreichungsgebühr, Journaleinreichung,
payment fee	transaction fee, bank transfer, credit card, Bankgebühren,
read	contracts: read fee, Zugangsbereitstellung, Leseberechtigungen,
publish	contracts: publish fee, Publikationsdienstleistungen,

### Hands-on!

### Glossary of publication cost types

other 🕏		
	translation charge	translations charge, translation fee, Übersetzungsgebühr, Übersetzer:in,
	abstract charge	abstract charge, abstract fee, abstract handling charge, abstract submission charge, abstract management charge, abstract processing charge,
	editing charge	editing charge, editing fee, proofreading charge, document editing, academic editing, copyediting, english editing, Korrektorat, Korrekturservice, Lektorat, (image editing, cover design),
	print charge	print charge, print fee, printing charges, printing and binding, Druckkosten, Auslagen für Druck, Auslagen für Druckerei, Print- Publikationsgebühren,

Please add further terms!

• Keep in my mind that there is a superordinate object that is to be published and to which the other charges refer. For example, an Open Access charge can then be assigned to this object by term:

APC - Article Processing Charges

BPC - Book Processing Charges

CPC - Chapter Processing Charges

DPC - Data Processing Charges

**EPC – Electronic Publishing Contracts** 

•••

VPC - Video Processing Charges

...

preliminary keywords in the subordinate right column, not yet part of openCost cost type values (as the metadata schema is dealing with single articles and contracts so far)

# Thank you!



#### **Contact**

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