



Strategic Plan
2024-2028



Contents

A Word from the Board of Directors | 3

Goal 1 - Boost the openness of the humanities and social sciences for the benefit of all | 5

Objective 1

Transition to open access through stable yet diversified economic models

Objective 2

Make the reading experience effortless and satisfying for everyone

Objective 3

Reach new readerships through a deeper understanding of their habits

Objective 4

Highlight content

Objective 5

Ensure that OpenEdition's IT ecosystem is based on libre software whenever possible

Goal 2 - Confirm OpenEdition's position as a key player at national, European and International level | 8

Objective 6

Apply best practices to managing the service catalogue

Objective 7

Clarify, share and guide OpenEdition's international ambition

Objective 8

Nourish the open science ecosystem thanks to our partnership policy

Objective 9

Anticipate our ecosystem's development trends

Objective 10

Promote and encourage the use of best practices by OpenEdition communities

Goal 3 - Foster the engagement of our communities | 11

Objective 11

Maintain a strong and organic relationship with user communities

Objective 12

Provide a clear and beneficial partnership policy

Objective 13

Share and ensure widespread uptake of open scholarly communication skills and practices

Goal 4 - Consolidate OpenEdition as a responsible and sustainable infrastructure | 13

Objective 14

Build an HR and financial management policy with our parent institutions to support the implementation of this strategic plan

Objective 15

Promote a culture of diversity, equity and inclusion

Objective 16

Make sobriety a priority in response to climate change

Objective 17

Anticipate advances in technology

Objective 18

Streamline internal processes and facilitate collaborative work



A Word from the Board of Directors

Context

Before you discover our 2024-2028 strategic plan, we feel it is important to provide a brief reminder of OpenEdition's origins as a unique research infrastructure, built on founding principles that still guide us to this day as we make choices and key commitments to build our future.

OpenEdition was born in 1999 under the name Revues.org. We defined ourselves as a "federation of humanities and social sciences journals managed on a voluntary basis by a group of young researchers". From the outset, we drew strength from the opportunities offered by the web in our quest to promote bibliodiversity, visibility and access to knowledge for all, becoming part of the nascent open science movement, formalised by the Budapest Initiative in 2002. Against a backdrop of flourishing diversity, in terms of scholarly content, stakeholders and the organisations producing, disseminating and benefiting from knowledge within the humanities and social sciences, the need for balanced and adapted dissemination solutions emerged. At the time, the only open access options appeared to be the gold and green models, yet OpenEdition was already offering a diamond open access model for disseminating structured content in full text format, thereby transposing scholarly communication practices into a digital environment.

In the last few years, public policies in support of open access have gained momentum in France and Europe, helping to institutionalise the OpenEdition project, which is now a national research infrastructure. We work constantly to support our communities – all those involved in open science, research and knowledge production – and guarantee them publishing and scientific autonomy. OpenEdition offers all these contributors a wide range of services, resources and toolsuites designed to help them build empowering skills related to its missions.

As a part of the French National Plan for Open Science, OpenEdition continue to promote the free dissemination of the results, methods and products of scientific research in the humanities and social sciences. This strategic plan is therefore an opportunity to re-assert OpenEdition's public service mission, focused on satisfying the general need for access to information, ensuring equality of access, guaranteeing service continuity and adapting to the needs of society.

Needless to say, our infrastructure plays a key role in the dissemination of the knowledge commons and significantly contributes to its widespread circulation within society. Our ambition is to help everyone understand the world we live in. We aim to provide keys to unlocking knowledge by offering universal access to scholarly work that studies the social worlds of the past, present and future.



Why draw up this strategic plan?

In the context outlined above, we wanted to give our teams, readerships, user communities and parent institutions a concrete vision of the path we plan to follow during the coming months and years. This five-year strategic plan, which will lead us to OpenEdition's 30th anniversary in 2029, is the result of a huge collective effort, the goal being to juxtapose and reconcile the challenges, ambitions and resources of our infrastructure. Thought and discussion helped us identify our various levels of commitment, serving to clarify OpenEdition's stance on issues that sometimes have a political as well as a technical aspect.

This strategic plan details the key goals of our collective strategy, which include showcasing the infrastructure's international dimension more effectively, working more closely with our users and adapting our organisation to social and societal challenges. These goals are realistic, and so is our ambition. Furthermore, to ensure that our aims are clear and achievable, every objective is underpinned by a number of key actions, with further actions listed in a table appended to this plan and updated annually.



Acknowledgments

Everything we do at OpenEdition is guided by our watchword – openness. It was therefore unthinkable not to involve our closest and most dedicated stakeholders in bringing this strategic plan to life.

Throughout the process, the plan benefited from contributions and feedback from the OpenEdition team, representatives of our communities and our parent institutions, during workshops, working sessions, one-on-one meetings and the different writing stages. All of that was fundamental to uniting our community around a common project, to share its guiding principles while also acknowledging the great diversity of skills that contribute to OpenEdition's rich tapestry. We would like to thank each and everyone for their availability, commitment and invaluable contributions.



GOAL 1

Boost the openness of the humanities and social sciences for the benefit of all

OpenEdition welcomes tens of millions of unique visitors to its platforms from across the globe every year. However, access is somewhat unevenly distributed in terms of geographical area and readership. We believe the humanities and social sciences are fundamental to society. They fuel debates, provide a better understanding of the world and help us build informed opinions, which is why OpenEdition is seeking to make them easier to access and discover. Scholars will naturally benefit from improved access and interoperability, but so will non-academic audiences. By building partnerships with stakeholders engaged in scholarly mediation and supporting open access to content, we will enable the humanities and social sciences to reach a wider audience.

Objective 1

Transition to open access through stable yet diversified economic models

We follow a policy of openness and endeavour to increase the volume of open access content available on OpenEdition Journals and OpenEdition Books. The policy will be discussed with publishing teams, to maintain the equilibrium of each individual project, and with the stakeholders who support the open science movement politically and financially. The idea is to continue promoting the transition to open access, while also creating the right conditions for it to flourish by encouraging mutual understanding of stakeholder roles and long-term collaboration.

Examples of actions

- Work with publishers to draw up procedures for transitioning to open access.
- Produce an evaluation report on the Freemium programme for supporting open access.
- Join forces with all stakeholders to build long-term support mechanisms for open access.

Objective 2

Make the reading experience effortless and satisfying for everyone

OpenEdition is a digital player that has always focused on providing an effortless reading experience whatever the internet access conditions, by offering structured content available in various formats: HTML, PDF and ePub. By redesigning a large part of our software infrastructure, we will improve the quality and comfort of the reading experience for everyone, including for people prevented from easy access, regardless of internet access conditions and the devices used.

Examples of actions

- Create a customisable space for readers.
- Upgrade our services to make it compliant with accessibility standards and provide an annual report of the action taken.
- Offer structured navigation pathways between OpenEdition content and that of our partners.

Objective 3

Reach new readerships through a deeper understanding of their habits

Our editorial policy is built around two ambitions: offering a diversity of scholarly content and making our platforms accessible to all. The second ambition is the reason why we are channelling efforts into research activities at OpenEdition. Setting up a usage observatory will provide us with more insight into our readership and the audiences we have not reached yet. Based on the information gathered, we will bring out a new version of our catalogue to engage with potential readerships more successfully. We will also make content easier to discover, especially by profiling target audiences and building partnerships with content promotion players, such as Wikipedia and other relevant media.

Examples of actions

- Create a usage observatory.
- Redesign the catalogue to encourage users to navigate between the four platforms.
- Devise a mediation strategy.

Objective 4

Highlight content

We will be stepping up our efforts to promote the content of our platforms through mechanisms for enriching and linking content, as well as mechanisms for interconnecting the various tools used. By using standard databases, identifiers and formats, we will be able to generate richer data and boost interoperability.

Examples of actions

- Boost content categorisation to improve findability.
- Undertake R&D to build tools that can be used to enrich and promote content.
- Highlight scientific assessment.

Objective 5

Ensure that OpenEdition's IT ecosystem is based on libre software whenever possible

We have always been strong believers in the libre software movement, which is why we use such software as a priority. As for the proprietary software we still use, we will gradually migrate to libre software whenever the opportunity arises, hand-in-hand with our partners. We will share the applications we develop and any expertise acquired on the use of other libre software applications.

Examples of actions

- Draw up a policy on sharing our software outputs.
- Showcase our use of libre software and support this approach.
- Conduct an inventory of the proprietary tools and services we use, with the goal of replacing them.



GOAL 2

Confirm OpenEdition's position as a key player at national, European and International level

Central to the open science movement and part of the national roadmap of French research infrastructures, OpenEdition plays a pivotal role in open communication for the humanities and social sciences. The role entails coordinating a network of partners at national level, who will be able to draw on the services offered by OpenEdition, while also weighing in on the structuring of the sector at European and national level, to ensure research in the humanities and social sciences benefits from optimum visibility and recognition.

Objective 6

Apply best practices to managing the service catalogue

OpenEdition fulfils a public-service mission that consists in providing universal access to the scientific knowledge we host on our platforms. To do this, among other things, we offer a range of structured services in a catalogue that is easy to read. Many of the services are linked and connected to those offered by other stakeholders, primarily thanks to [COMMONS](#). We will make sure that we facilitate interoperability between services and improve content discoverability by incorporating our management methods into a shared best practices framework.

Examples of actions

- Develop a common approach to managing a catalogue of services.
- Publish the service catalogue on a dedicated web page and update it annually.

Objective 7

Clarify, share and guide OpenEdition's international ambition

OpenEdition is a French national research infrastructure open to the world and its diversity of publishing languages. At European level, we are currently steering the implementation of OPERAS as an ERIC. Internationally, we have links with stakeholders in numerous countries, and many of the visitors to our platforms come from North America, Latin America and Africa. Given the abundance of possibilities, we will need to redefine and manage our priorities, while also making sure that the action taken is in tune with, or complementary to, the other needs of the infrastructure.

Examples of actions

- Set up OPERAS as an ERIC in France, with OpenEdition in the driving seat.
- Develop a framework for managing our commitment to international projects.
- Integrate the DOAB into our service catalogue.

Objective 8

Nourish the open science ecosystem thanks to our partnership policy

Over the last ten years or so, the French open science landscape has become richer, more diverse and increasingly structured. OpenEdition has contributed to these developments by fostering the emergence of new stakeholders. However, the existence or creation of bilateral and ad hoc partnerships does not make for a partnership policy, which still needs to be established. We therefore need to draw on our deep understanding of the national open science ecosystem to set priorities and assign the resources required for our partnerships to thrive.

Examples of actions

- Map out and monitor our partnership ecosystem.
- Prioritise our partnerships based on complementarity and mutual sharing.

Objective 9

Anticipate our ecosystem's development trends

OpenEdition works in a constantly and rapidly evolving environment, in terms of technology as well as practices. We will develop our Research & Development (R&D) activity and keep a constant watch for any major and lasting changes in order to fully understand them. If we want to anticipate, measure, select and programme the adjustments we make to our service offer, the technologies we use or our organisational methods, we will need to factor in those changes.

Examples of actions

- Participate in community discussions on strategic standards for OpenEdition.
- Set up an ecosystem watch and communicate about it across our communities.

Objective 10

Promote and encourage the use of best practices by OpenEdition communities

Through our research, development and monitoring activities (see previous objective), we adopt and apply several standards and best practices. We communicate about them in our service catalogue, and promote them among our communities. To encourage uptake, we will communicate more about our best practices and provide more training on this subject too.

Examples of actions

- Implement a set of selected standards across platforms.
- Improve the documentary information available and its promotion.
- Strengthen training activities and community management on best practices.



GOAL 3

Foster the engagement of our communities

OpenEdition's platforms and activities reach a wide audience, which is diverse and often multifaceted. It includes researchers, publishers, people working in the field of scientific and technical information, civil society, public policy makers, the general public, librarians, etc. The services and resources available to all these audiences are also part of relational and interconnected networks, including technical ones. This assortment of users and partners come together to form OpenEdition communities. The challenge in achieving our third goal lies in strengthening the ties and relationships with these communities over the long term, and fostering their engagement. It involves working closer together to identify needs and create spaces for sharing open scholarly communication best practices, conventions and skills.

Objective 11

Maintain a strong and organic relationship with user communities

The role we play in this ecosystem is closely linked to the special bonds established with our user communities. Although annual meetings remain a key opportunity for sharing and exchanging, our relationships need to be nurtured on a daily basis. We will strengthen, structure and create new forms of exchanges to work together on improving and further developing services, while also providing an ideal environment for acquiring the knowledge, skills and practices inherent to open science.

Examples of actions

- Adopt an even more professional approach to community management.
- Organise and hold different types of meetings.
- Set up a network of community representatives.

Objective 12

Provide a clear and beneficial partnership policy

OpenEdition and its members foster a variety of strong ties with numerous stakeholders who are key to the production and dissemination of open knowledge. These ties tend to lead to official or unofficial collaborations and partnerships. Some are sustained simply through exchanges, whereas others develop into full-blown projects or joint initiatives, the sharing of knowledge, expertise or tools, etc. After an initial mapping out of the terrain, we will analyse and classify this network of relationships and partnerships to better monitor their progress while also taking care to promote them and ensure their long-term success.

Examples of actions

- Enhance our service offer through new partnerships.
- Study the feasibility of new ways to promote our content within our partner organisation.

Objective 13

Share and ensure widespread uptake of open scholarly communication skills and practices

Today, open science is a public policy. However, it was conceived, developed and built as part of a wider movement with roots in the birth of the digital age. The ambition of open science is to produce and advance scientific knowledge by placing it back in the hands of society, the goal being to help democratise knowledge on a global scale. We will jointly develop and share skills, practices and training initiatives. We will also help information to circulate so that everyone can adopt the best practices related to open science in an informed and rational way.

Examples of actions

- Raise awareness among students about the tools and resources at their disposal.
- Better integrate our training offer into higher education and research pathways.
- Set up an environment to make it easier to contribute to Lodel.



GOAL 4

Consolidate OpenEdition as a responsible and sustainable infrastructure

As a research infrastructure delivering enhanced services to the entire research community, OpenEdition has to meet demanding operational requirements that entail a robust and effective organisation of our work. At the same time, alongside others, we have to cope with a rapidly changing environment requiring the ability to anticipate and adapt at all times. The growing number of crises of all kinds, operational differences between the administrative divisions of parent institutions, the new aspirations of the younger generations, the diminishing appeal of public sector jobs and emerging technological innovations are all challenges that place constant demands on our work collective. We will seek to develop an organisational structure that will enable us to take this diversity of challenges in our stride, while also providing the means for each member of our team to flourish.

Objective 14

Build an HR and financial management policy with our parent institutions to support the implementation of this strategic plan

The success of this strategic plan and all its objectives depends on the infrastructure having the appropriate resources at its disposal and our team's well-being in a particularly complex institutional and regulatory landscape (diversity of parent institutions, constraints specific to the public sector). To meet these challenges, with the help of our parent institutions, we will need a robust and effective organisational set-up, to bolster the infrastructure and support the team members in their career path.

Examples of actions

- Stabilise the team to consolidate everyday activities and ensure continuity of service.
- Set up an annual meeting with HR and administrative managers from our parent institutions.
- Improve the working environment and conditions.

Objective 15

Promote a culture of diversity, equity and inclusion

The humanities and social sciences endeavour to help us understand the world in which we live as individuals and as a group. OpenEdition's duty alongside this ambition is not only to promote bibliodiversity, but also to factor in the direct and indirect impact of its actions and operations on the environment, the social fabric, the work collective and, more broadly, all the people that contribute to and take part in its activities. We will uphold ethical practices and develop an action plan to promote and foster a culture of diversity, equity and inclusion, in keeping with our public service mission.

Examples of actions

- Appoint a referent within the team and follow up a well-defined action plan.
- Take better account of the different cultural contexts.
- Promote content that provides insight into these issues.

Objective 16

Make sobriety a priority in response to climate change

We want to contribute actively to combating the effects of climate change. From 2024, we will include a section on OpenEdition's environmental impact in our annual report. Taking stock of our greenhouse gas (GHG) emissions and reinforcing our existing "low tech" initiatives will enable us to measure our impact on the environment more precisely. We will then be able to roll out new priority measures, making sure we get the whole team on board. The measures will apply to our working methods, our platforms and high-availability information system, as well as our training offer. We will also share and discuss these practices with our communities.

Examples of actions

- Produce an annual GHG emissions report.
- Draw up an action plan for reducing our environmental impact.
- Prioritise local sourcing, recycled materials and the repairing of equipment.

Objective 17

Anticipate advances in technology

Software technologies are constantly and rapidly evolving. That is why we need to update our tools to incorporate both current and future developments. Our goal is to reduce our software's technical debt, adopt good software engineering practices and anticipate developments. We will then be able to provide tools which can adapt to a variety of user needs.

Examples of actions

- Continually upgrade and improve platforms.
- Adopt a coherent software policy.
- Improve search engine optimisation.

Objective 18

Streamline internal processes and facilitate collaborative work

Our everyday work ranges from performing recurring tasks to steering projects and setting up and maintaining partnerships. It involves minutely coordinating all our teams and their activities, as well as sharing information efficiently. We will put together a comprehensive overview of our skills, showcasing the expertise of each of our team members, while also encouraging autonomy, responsibility and collective intelligence.

Examples of actions

- Launch a review of our internal procedures with a view to simplifying them.
- Coordinate different working methods so they fit together smoothly.
- Formalise the roles of key individuals and working groups.

