

# STRATEGY OF THE ZBW 2022-2026

*ZBW – Leibniz Information Centre for Economics  
Kiel/Hamburg*



## *Preamble*

**The digitisation of the science system opens up completely new opportunities for more openness in science. This openness increases quality, reproducibility, and transparency of scientific findings. Society, business and politics can participate in scientific processes on an unprecedented scale and make use of scientific knowledge and findings to contribute jointly to the solution of global challenges.**

**The digitisation of science also presents enormous challenges to all stakeholders in the science system. The research and publishing processes as well as the behaviour of market actors are changing fundamentally. From this it follows that new negotiating processes between actors in long-established markets, such as the publishing market, are needed. In addition, new markets arise, for instance in the area of research data, for which market behaviour, market actors, market growth etc. cannot be fully predicted at this time today.**

**In this context the ZBW – Leibniz Information Centre for Economics places its strategy 2022-2026, which consistently follows up on the strategy 2015-2020. This strategy is to be seen as the implementation and focusing of the mission laid down in the ZBW statutes. Bearing this in mind, not all areas of activity which are opened up by the digitisation of the science system will be addressed. Digitisation, as it is understood for the purposes of this strategy, is the digital change, creation, and provision of scientific information and of digital services to procure such information. The strategy in particular addresses the effects that digitisation has on research and publishing processes in economics.**

**With its strategy, the ZBW wants to contribute to the best possible use of the chances offered by digitisation in the fields of research and innovation, and aims to have a part in shaping digitisation in economics. This strategy contributes to offering innovative services for modern information provision in economics. Within the context of this strategy document, the research community in economics includes students, teachers, and researchers in economics at all stages of their academic career.**

**To achieve this goal, the ZBW applies its comprehensive user and market knowledge, its unique and growing holdings (both printed and digital), and its research excellence in the field of Open Science. In addition, it arranges a steadily growing number of accesses to scholarly information relevant to economics.**

**The ZBW is aware that the strategy can only be successfully implemented if great importance is attached to the qualification and innovative strength of its own employees. Their enthusiasm and ingenuity are the foundation for the success of the ZBW.**

**Numerous documents address the framework conditions underlying this strategy.**

**Among the most important in Germany are:**

- Pact for Research and Innovation, Joint Science Conference (GWK)
- Declaration on Goals and Measures of the Leibniz Association in the Pact for Research and Innovation – Update 2021-2030
- DFG Impulse Paper The Digital Turn in the Sciences and Humanities (2020)
- Open Access Strategy 2021-2025 of the Alliance Initiative Digital Information
- German Council for Science Information Infrastructures: Digital competencies – urgently needed! Recommendations on career and training prospects for the scientific labour market (2019)
- German Council for Scientific Information Infrastructures: Performance through diversity. Recommendations regarding structures, processes, and financing for research data management in Germany (2016)

**Beyond this, the following internationally relevant recommendations provide guidance for the ZBW:**

- UNESCO Recommendation on Open Science (2021)
- Future Frontiers – G7 Compact on Research Collaboration (2021)
- Prompting an EOSC in practice – Final report and recommendations of the Commission 2nd High Level Expert Group on the European Open Science Cloud (EOSC) (2018)
- 10 Principles of Plan S – Making full and immediate Open Access a reality
- Open Access 2020 Mission Statement

**The following pages first present the statutory mission and vision of the ZBW. Four strategic priorities are framed which serve to fulfil the mission and to approximate the vision as best as possible. For each of these strategic priorities, individual goals are subsequently defined that must be reached by the year 2026. The description of strategic approaches related to these goals shows how these goals are to be achieved. The concrete measures and necessary resources for implementing the strategic approaches are to be described in the ZBW's annual financial plans, the so-called programme budgets, i.e. outside of this strategy document. The degree to which the goals of this strategy will have been achieved will be verified regularly by means of qualitative and quantitative indicators stated in the programme budgets so that controlling measures can be defined in case of deviation. Subsequently, the strategy document addresses important cross-cutting issues that affect all areas of the ZBW.**

## *Mission*

**The foundation collects and indexes economic literature published all over the world. It offers comprehensive services that enable an efficient, effective, and sustainable use of scientific information in economics. It is a user-oriented scientific information infrastructure institution committed to modern and innovative exigencies of information provision.**

## *Vision*

**The ZBW sets national and international benchmarks for modern information provision in economics.**

# *Strategic priorities*

## *1. Contextualising digitalisation*

**It is of the utmost importance to the ZBW to contextualise as best as possible the digitisation of science in general and of economics in particular and the concomitant scientific processes, methods and tools, so it can fulfil its mission. The digitisation of science affects essential areas that are relevant to the future success of the ZBW. Among these are scientific working practices, research and publishing culture, scholarly communication, and the change of the (digital) publishing market. Lastly, digitisation also affects internal areas of the ZBW as a research-based infrastructure institution, for instance in the design of digital working environments for its employees.**

**The ZBW understands digital transformation as a process where hybrid and digital formats are becoming ever more important beside analogue formats. This strategic priority ensures that the ZBW continuously takes measures to recognise the effects of digitisation on research and publishing processes, as well as its own working practices, early and to contextualise them appropriately in an analogue, hybrid or digital world. Based on this, the ZBW develops existing offers, creates new offers or ends offers that no longer meet the requirements or expectations for digital scholarly work.**

**Goal 1.1: The ZBW identifies needs and existing potentials to support analogue, hybrid, and digital working practices in economics as best as possible.**

*Strategic approach:*

- Intensive contact with the users of ZBW services during day-to-day operations and tightly focused user experience studies serve to gain experience with and knowledge about working practices.
- Intensive contacts with learned societies in economics, active participation in economics-related consortia of the National Research Data Infrastructure (NFDI), participation in national and international bodies, joint projects with scientific institutions, and the organisation of its own events contribute to an exchange of experiences with the economic research community.
- Issue-specific advisory boards as well as the Scientific Advisory Board of the ZBW contribute to safeguard the knowledge gained and the measures derived from it.

**Goal 1.2: The ZBW continuously observes the changes in research and publishing processes in economics that arise from digitisation.***Strategic approach:*

- The ZBW carries out research and teaching in the field of “Digital Economics”. This produces important findings about changes in the processes of research, publishing, and knowledge transfer in economics.
- Tools are developed that enable the ZBW to be in continuous dialogue with representatives from economics.
- Surveys, analyses of digital environments and platforms, and workshops with the economic research community on digital working practices in economics are conducted.

**Goal 1.3: The ZBW positions itself in markets relevant to it and actively links up with stakeholder groups acting in these markets.***Strategic approach:*

- The ZBW carries out research and teaching in the field of “Digital Publishing Markets and Models”. This delivers important findings about relevant markets and derives options for positioning the ZBW in these markets.
- Market surveys are conducted, analysed, and measures taken to position the ZBW in its relevant markets with a defined claim.
- ZBW staff actively engage in interest groups that are relevant to their activities.

**Goal 1.4: The ZBW regularly reflects on the effects that digitisation has on the working environments within the ZBW.***Strategic approach:*

- The staff section Human Resources and Organisational Development develops tools to monitor the effects of digitisation on the working environments of the ZBW. Requirements for digital workplaces in the ZBW are derived from the findings.
- All working areas in the ZBW regularly evaluate their workflows and tools with the goal of either digitising them further or adapting them to changes arising from digitisation.

## *2. Researching digitisation*

**The digitisation of the science system is not only changing research and publishing processes in economics, but also their publication markets and models. Digitisation also opens up chances and opportunities for digitising existing offers and workflows and for creating new offers for the ZBW's target groups. Digitisation also quickens a change within the science system towards more openness, which can be subsumed under the term of "Open Science".**

**The ZBW actively pursues the principles of Open Science and thus fosters a culture of open access to findings and knowledge, and of open collaboration. To be an active participant in the further development of Open Science, it carries out multiperspectival research in this subject area. This research delivers innovative ideas as well as methods and tools resulting from it, which serve to increase the innovativeness of existing ZBW services or to develop and provide new services. Particular importance thus accrues to the strategically organised transfer of research findings into the services of the ZBW.**

**All research areas at the ZBW strive for the highest level of excellence in their work, are superbly networked nationally and internationally in their respective research community, and maintain cooperations with local universities as well as research groups of other research and information infrastructure institutions.**

**Goal 2.1: Based on a nationally and internationally accepted, multidisciplinary research profile, the ZBW carries out excellent research in the field of Open Science.**

*Strategic approach:*

- The framework conditions needed to generate excellent research findings are offered to all researchers.
- In accordance with the key issues paper "Openness as area of action for the ZBW", research findings are made available primarily as "open". Publications in Open Access are published in nationally or internationally renowned conference proceedings and journals. Software developed at the ZBW is published under an open licence in appropriate code repositories.
- The ZBW organises scholarly events in the field of Open Science with an international approach and co-organises other subject-relevant scholarly events.

**Goal 2.2: The autonomous and application-oriented research areas of the ZBW are anchored within the structures of the ZBW, coordinate their work, and find common subjects for it.**

*Strategic approach:*

- Depending on the subjects of their research focuses, research areas are anchored within different programme divisions of the ZBW.
- Research areas harmonise and coordinate their research subjects and align them to a research concept within the field of Open Science.
- The national and international networking of the research areas ensures that research findings of the corresponding communities which are relevant to the ZBW are introduced into the programme divisions.

**Goal 2.3: The research areas actively contribute to the transfer of research into the ZBW.**

*Strategic approach:*

- A concept for research transfer frames the conditions for the successful transfer of research findings into the services and offers of the ZBW.
- Research areas are in continuous exchange with the departments responsible for a ZBW service or offer.
- Departments and research areas cooperate in those fields where all identify a high potential for innovating a service or offer.

### *3. Shaping digitisation*

**The ZBW understands the profound changes concomitant with the digitisation of economics. Based on this knowledge, it contributes to the shaping of the digital change in economics. This applies to the digital transformation process in economics, in particular in relation to digital research and publishing processes, and the resulting consequences for libraries and their range of services. The starting point is the research focus Open Science and its concomitant cultural change towards more openness in science, which for the ZBW always includes opportunities for reusing findings.**

**The ZBW engages proactively for the Open Science transformation of the publishing market in economics. Particular importance is attached to the free and open access to economics-relevant information. Among these are scholarly publications, research data, open educational resources, and research software. Innovative services are designed and offered which position the ZBW as a provider of information resources as well as a curator of publishing processes.**

**The ZBW contributes its experiences, combined with its research-based knowledge, actively to bodies and discourses in science policy at the national, international and European level.**

**Goal 3.1: At the national, international and European level, the ZBW actively contributes to debates in science policy as a recognised partner, especially on the themes of the digitisation of the science system and Open Science.**

*Strategic approach:*

- ZBW employees are supported in their efforts to participate nationally and internationally in science policy debates and to collaborate in advisory boards, reviewing boards and other bodies.
- The ZBW engages at different levels in national and international science policy. At the national level, this includes advisory bodies of the Federal and State ministries of science, and of the Federal Ministry for Economic Affairs. At the level of the European Commission, this includes expert groups or partnerships established between science and the European Commission. At the international level, the focus is on bodies created by the G7 group of countries or intermediary organisations for multilateral science policy.

**Goal 3.2: The ZBW creates open digital accesses to economics-relevant information resources.***Strategic approach:*

- The ZBW actively shapes the transformation towards Open Access by amalgamating licences for barrier-free access to German research output with its national and international dissemination. This increases the visibility of German research output in economics and at the same time widens access to licenced publications from publishing houses in Germany.
- Access to information resources remains based on processing their contents and ensuring their long-term availability. For both, new technological developments are continuously evaluated and adopted.
- The ZBW advocates an open design for national delivery systems regarding the provision of electronic publications.
- The automatic creation of formal and content-descriptive metadata is increased to master the growing number of scholarly publications, and to index aggregated metadata from different sources as comprehensively and purposefully as possible.
- For the purpose of discovery, metadata of information resources are processed in ways that correspond to modern requirements for machine-readability.
- The persistent availability of digital information is ensured primarily through (retro)digitisation and long-term preservation.
- For future space requirements of analogue holdings, strategic collection care takes into consideration the transformation towards digital information and ensures a future-proof analogue collection.

**Goal 3.3: The ZBW ensures that its offers are future- and user-oriented and open for reuse.***Strategic approach:*

- The portal EconBiz is built up into one of the internationally leading research tools for economics. A user advisory board and other dialogue formats ensure that both contents and functionalities fulfil the expectations of users. Research-based, innovative, and Open Science-supporting features complement the service portfolio after positive evaluation.
- The publication server EconStor is built up into one of the internationally leading Open Access repositories in economic research. The monitoring of essential indicators, annual user workshops, and other dialogue formats ensure regular consultation with the interests of the community. The link-up with bodies and networks in science policy also ensures that the corresponding requirements relating to Open Access transformation are addressed.
- The ZBW-owned knowledge organisation systems are closely harmonised with the current needs and the research behaviour of the economics community, both regarding themes and subjects. They set national and international benchmarks for future-oriented content-related retrieval and description of information objects in economics.

- Through its engagement in the economics-relevant NFDI consortia KonsortSWD and BERD@NFDI, the ZBW develops a future-oriented and open service portfolio for research data management in economics. Selected services are transferred to permanent operation in agreement with the economics community.
- User areas are developed into hybrid learning spaces to provide users with a digital, self-organised learning environment in analogue and digital space.

**Goal 3.4: The ZBW supports the Open Science transformation in economics.**

*Strategic approach:*

- The ZBW offers a central access point with information, tools etc. for Open Science to researchers in economics and enlarges it continually.
- Workshops, panel discussions etc. on Open Science topics are organised regularly at economics conferences and with the economics community.

**Goal 3.5: The ZBW supports and curates publishing processes of economic content while observing Open Science principles.**

*Strategic approach:*

- The Open Access journals Wirtschaftsdienst and Intereconomics change their publishing processes from “print first” to “online first”.
- EconStor as a subject-specific Open Access repository bundles and disseminates freely accessible publications from economic research. In the process of Open Access transformation it integrates more and more publications for which all access barriers have been removed by agreement with publishing houses.
- The ZBW positions itself as a permanent and reliable infrastructure partner in the economics-related consortia of the National Research Data Infrastructure. Its services for research data management include the search, storage and long-term preservation, publication, and documentation of research data.

## 4. *Qualifying for digitisation*

**The digitisation of the science system requires a permanent further development of the (digital) skills of ZBW staff. The main components are user-oriented thinking and acting, the understanding of digital technologies and tools, agile operations, modern methods of project control, and management. In this context, the ZBW supports the active efforts of its employees for goal-oriented development.**

**The ZBW sees itself as a flexible and agile organisation which continually recognises needs for change, evaluates them against the background of optimally fulfilling its mission, and implements them. Individual life-long learning and personal development, as well as organisational development, are essential and indispensable for the continuous development and renewal of the ZBW's offers.**

**The transfer of knowledge and experience around the digitisation of the science system is a particular concern of the ZBW. Therefore it supports its target groups actively.**

**Goal 4.1: The ZBW empowers its employees to actively shape the digital transformation of the ZBW and all resulting changes.**

*Strategic approach:*

- Fostering employees' digital understanding supports curiosity and comprehension of connections that may arise in the working environment through digitisation. It enables them to think and act openly and actively in a dynamic digital environment. It strengthens everyone's active role within the organisation.
- The attractiveness and transparency of academic career paths are increased to promote early career researchers. Scientific training is maintained at a high level; attractive career structures and market-driven professional perspectives are created.
- The promotion of employees' (digital) skills is accompanied by enabling managers to recognise and promote the individual potentials and skills of employees, to strengthen the autonomy of employees, and to model and advance an open, innovation-friendly learning culture.
- Employees are developed in accordance with their individual skills and thus prepared for changes and new activities in both the analogue and digital worlds.

**Goal 4.2: The ZBW provides digital working environments and digital training offers for its employees.***Strategic approach:*

- The chances arising from digital change are used for a continuous development of working environments. By using digital tools and technologies, administrative workflows are oriented more efficiently and working environments more flexibly towards new requirements.
- Based on digital working environments, working processes are developed and digitised continuously. Digital communication is one of the key aspects in this. For this, software and tools are applied that enable and extend barrier-free and simple communication and collaboration.
- The portfolio of digital training offers is adapted continuously to new requirements. This gives employees and managers a perfect fit for their development (individual blended learning) in an environment where learning and working is fun. The increased flexibility of workplace and workspace is taken into account.

**Goal 4.3: The ZBW uses digitisation to establish itself as a regionally and nationally attractive employer.***Strategic approach:*

- The ZBW targets digital channels in its personnel marketing to gain the early attention of potential employees.
- The growing digitisation is used to develop the welcoming culture of the ZBW. Virtual formats, e.g. for onboarding, serve to dismantle barriers to entry for all colleagues, and to foster a sense of belonging to the ZBW actively and from the beginning.
- With increasing digitisation, the flexible and family-friendly framework is enlarged, focusing on access to digital tools, technologies, and resources for all. The flexibilisation of working time and workspace plays an important role regarding a work-life balance.
- The ZBW encourages its employees to engage in national and international bodies, working groups and associations.

**Goal 4.4: The ZBW actively contributes to the development of digital skills, both in the economic research community and the library world.***Strategic approach:*

- Offers for developing digital skills, especially among early career researchers, are aimed at the economic research community. The focus is on managing research data and providing information literacy.
- Multipliers within the library world are supported with supplementary services in their teaching of digital skills for searching, accessing, and evaluating information.
- ZBW employees engage nationally and internationally in working groups and bodies addressing digital skills and thus actively shape the conditions for acquiring these skills.

## *Cross-cutting issues*

Below are listed the cross-cutting issues that guide all activities in and with the ZBW.

### *Openness*

The ZBW defines openness as practices and processes which foster participation and collaboration, accessibility and reuse, transparency and reproducibility. In accordance with this, collaborative work within the ZBW and with the ZBW is done openly wherever possible. Open, collaborative working is preferably supported by such digital tools that enable openness in the production as well as in the provision of products and results.

### *Knowledge transfer*

It is a matter of utmost concern to the ZBW to transfer its own, and the economics community's knowledge, into the non-academic world, to increase society's ability for reflection and innovation. Such transfer activities promote the application of knowledge in other areas of society. Knowledge transfer also serves to ensure the quality of research processes by critically questioning gained knowledge and reflecting it through dialogue with different target groups. Lastly, such knowledge transfer with the non-academic world reveals information needs and problems to the ZBW which it can integrate into its research projects and the innovation projects for the development of its services.

### *Internationalisation*

The ZBW is part of international networks, oriented internationally. An essential element of its global orientation and development is internationalisation which touches all areas.

### *Networking*

The ZBW fulfils its tasks in a close and long-established network of nationally important institutions. Among these are learned societies of economics and business studies, libraries and library networks, the Leibniz Association, and institutions of tertiary education, especially those in the ZBW locations of Hamburg and Kiel. The ZBW maintains and continually enlarges international networks and partnerships with renowned institutions all over the world, and engages in supranational advisory bodies for science policy. National and international networking enable the ZBW to conduct a continuous watch of markets and competitors with the express goal of discovering disruptive innovations, such as new competitors from other sectors, as early as possible.

### *Equal opportunities and diversity*

**The ZBW actively supports the equality of all genders and the appreciation of diversity. Recognising the chances and opportunities offered by digitisation for the (professional) equality of all employees and setting early impulses for using them is actual practice at the ZBW. Family-oriented human resources policies are also important at the ZBW. Shaping the continuing digital transformation process, and adapting it to the needs of diverse groups of persons, is a task which is supported by all areas of the ZBW equally.**

### *Sustainability*

**The ZBW sets high targets for sustainability and is guided in this by the 17 Sustainability Goals of the UN. This includes the sustainability of its holdings and services, the role of the ZBW as an attractive, permanent and reliable employer, the ecological sustainability, and the sustainability of its research and operational processes.**

### *Compliance*

**The ZBW sets high targets for compliance, i.e. rules for complying with laws, e.g. on data protection, or guidelines, e.g. for good scientific practice.**

## *Facts and figures*

**The ZBW holdings comprise 4.42 million media units and it provides access to 2.4 million electronic documents. In 2020, the number of supraregional downloads of digital full-texts was 12.3 million (2019: 9.6 million). The ZBW has almost 300 employees to fulfil its statutory tasks and receives annual funds to the amount of nearly 27 million Euros from the Federal Government, the State of Schleswig-Holstein, the Free and Hanseatic City of Hamburg, and from other German states. In addition, the ZBW records third-party funds to the amount of 1.5–2 million Euros annually.**

