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Director’s Introduction

At EDINA, we develop and deliver shared services and infrastructure to support research and education in the UK.

We are confident of our role as the Jisc-designated centre of expertise and centre for online services based at the University of Edinburgh. This is based upon excellent feedback from users and the knowledge and expertise we have gained in working with support staff in universities, colleges, research institutes and educational organisations since 1995/96 when EDINA was first established. We envisage a future in which we engage yet more effectively as an active member of the new ‘Jisc Family’, with its renewed ‘customer focus’.

We have learnt and will continue to learn much through our innovation and R&D activities, sharing the outcome and transforming the products of research into services for education and research. This means that Jisc’s customers and users can enjoy cost-effective access to high quality mapping, multimedia, reference and research data services, as well as benefiting from the information infrastructure we help to develop and deliver.

Continuing to be based within Information Services at the University of Edinburgh enables Jisc to gain leverage from the expertise and ICT resource base of a well-found university for the benefit of the whole of the UK. Our link to Edinburgh University Data Library, from which EDINA was initially formed together with the Library and Computing Services, provides us with insight that we can build upon when we engage with all universities and colleges.

We are working on our vision for 2020 and the strategic objectives we must attain in order to realise the vision. The EDINA Strategy for 2013-2016 is a staging post towards 2020 and contribution towards the strategic documents that are anticipated from Jisc over the coming months. It is intended as justification for the trust and investment placed in us by Jisc; by universities, colleges, schools and research institutes; and by a wide range of national and international bodies – governmental, educational and commercial – that support research and education.

Our Mission

We develop and deliver online services and digital infrastructure for UK research and education. Contributed as part of the ‘Jisc Family’, these are both high quality and cost-effective, drawing upon knowledge and expertise gained through research, innovation and development.

Stakeholder analysis has indicated that EDINA is well regarded as a national and international centre of expertise in:

- Shared digital services and infrastructure for research and education
- Geospatial services and infrastructure
- Access management infrastructure
- Continuity of access to scholarly resources

Our Vision

To be integral to the quality and productivity of research and education, in the UK and beyond.
Our Values

• **Innovation** for the benefit of research, education and the wider society
• **Engagement** with stakeholders, customers, partners and users, nationally and internationally
• **Expertise** and **Understanding** gained from the deployment of staff and technology in one of the world’s leading research and teaching Universities
• **Trust** deriving from a record of honest performance, being of and for the research and education sector which we serve
• **Excellence** in our work and the work of others

Context

Universities and colleges are facing unprecedented pressure as the knowledge economy and globalisation create ever-increasing demands for people who can innovate, solve problems and work in collaboration with others, and for researchers able to demonstrate impact across a wide variety of global and local issues. The cost-effective education of expanding numbers of their people is seen as a fundamental requirement by governments keen to thrive in a fast-moving world.

Student populations require personalised learning experiences, part-time and full-time educational opportunities, work- and home-based as well as campus-based study, and support for international as well as home students. Researchers need connections with peers around the world, ready access to peer-reviewed literature and other information, and assistance with handling the volumes of data generated during their work.

Digital technologies are key enablers of the changes necessary to support flexible delivery of education, of research that contributes to economic growth and prosperity, and of engagement with business and the community. Shared digital services lower costs and enhance productivity, allowing colleges and universities to create extra value and continuity of access to knowledge into the future.

Colleges and universities are facing tight funding constraints. The burden of paying for education is being progressively shifted to the individual rather than the state. Demand is bound to increase for high quality, cost-effective learning opportunities, underpinned by the latest technologies. Meanwhile, the costs incurred in undertaking high-level research continue to drive the need for shared efficiencies and competitiveness.

Meeting the Strategic Objectives of Jisc

Now a registered charity owned by Universities UK, Guild HE and the Association of Colleges (AoC), Jisc is reshaping its governance, structure and processes, and will publish its Strategy in due course.

The shared services initiated and managed by Jisc have continued focus on quality and productivity; they are enablers for cost cutting and efficiency at a time when the needs of the sector are moving at a fast pace and require a developmental response from the ‘Jisc Family’. 

EDINA develops and delivers in the following areas, enabling Jisc to address sector priorities and support national strategies:

**Digital content and discovery** – We develop and deliver online services to staff and students in over 150 universities and 120 colleges in the UK. Flagship services include the Digimap Collections, SUNCAT and Jisc MediaHub (the latter as part of Jisc eCollections). We work closely with Jisc Collections, which licenses relevant content on behalf of the UK academic community; and as well as developing and delivering
services, we provide a high quality, well-regarded helpdesk, online documentation, training, webinars and user support.

**Digital infrastructure and technology** – EDINA is at the forefront in creating the digital infrastructure for UK scholarship. This includes the provision of a world-class geospatial data infrastructure; middleware for interoperability and access management across the UK’s digital library; and components in the national e-journal archiving and repository infrastructure, including self-deposit and open access facilities. We also played a pioneering role (with Mimas) in the UK repository for educational materials and open educational resources. We utilise the University of Edinburgh’s world-class infrastructure and broader support network to yield a cost-effective and highly competitive product at marginal cost.

**Advice and Support** – Across our services, we provide advice and assistance to help our users engage with innovative digital content and technologies to achieve their goals. At Jisc’s request, we represent the sector in the geospatial UK Location Programme. As technical lead for the UK Access Management Federation, EDINA provides consultancy on access management issues for the community, and expert guidance to Jisc as required.

**Futures** – With a proven track record in cutting edge technological investigation and delivery, our capabilities are based in economy of scale and a critical mass of skill and talent. Under Jisc’s policy control, we act as a centre of excellence for research and development in key strategic areas for Jisc.

**Our Stakeholders**

Our principal stakeholders are universities and colleges in the UK, and their leaders; also their library and IT support staff that recommend and/or take decisions on which services to buy on behalf of their staff and students.

Our services are used by researchers, lecturers, teachers and students; and infrastructure services by the ‘machine as user’. That is, machine-to-machine processes that assist support staff and benefit users of services without their direct knowledge.

We have stakeholders in the schools sector in the UK: the schools themselves and those within who decide to take the services. The services are used by teachers and pupils both in the classroom and outside it.

Jisc itself is a major stakeholder. At times it requests EDINA to undertake particular innovative and experimental work on behalf of the sector; at other times we bid for funding grants. Other organisations also commission work from us, including our host University.

We work in partnership with other organisations in projects funded by the European Union, and other funding bodies and organisations.
EDINA Strategy 2013–2016

Strategic Aims and Objectives

1. Activity and Value Proposition

We will develop and deliver shared digital services and infrastructure that are essential to the functions of the research and education sectors on behalf of Jisc, the University of Edinburgh, UK universities and colleges, and related bodies such as the UK Research Councils and schools.

1.1 Shaping the future through the uptake of valued digital services based on innovative research and development

1.2 Ensuring ease and continuity of access to the resources needed in research and education

1.3 Reaching out actively to listen to our stakeholders and users, delivering the infrastructure and services that they need

1.4 Contributing to the transfer of knowledge, ideas and expertise towards influencing and realising societal benefits, both economic and cultural

1.5 Gaining leverage through national and international engagement for the benefit of our stakeholders and communities

Outcomes

- Improved understanding, materialised as innovative tools, facilities and research reports
- Sustainable quality assured, cost effective services and development as an integral part of the academic infrastructure in the UK and internationally
- Improved engagement and continued high quality outreach and support services for universities, colleges and schools, users and support staff
- National and international recognition as a world-class centre of expertise and national academic data centre, working with a network of partners, under policy control of Jisc, its owners and stakeholders

Strategic Objectives for 2014

1. Deliver highly valued services to our sectors and ensure the sustainability of our digital resources in a volatile environment

2. Successful contribution to Jisc activity and engagement, working closely with sector stakeholders to determine priorities that bring value

3. Successful contribution to the University of Edinburgh's activity and engagement

4. Continuous service quality improvement, applying technological advances to the presentation and integration of data

2. Resources and Context

We will enhance our resource base through talent, technology and effective management.

2.1 Building business capability in order to deploy and share our expertise, including the recruitment of talented, skilled and motivated staff

2.2 Understanding and deploying new technological developments to develop and maintain outstanding IT capability

1. See Annex 2 for details
2.3 Operating a cost-effective, efficient and supportive organisation that prioritises quality and value for the knowledge and services that we produce

**Outcomes**

- Flexible complement of able, skilled and well-motivated staff sharing expertise with each other, the University, key partners and the outside world
- Delivery of relevant services which are scalable, robust and reliable
- Valued and respected by Jisc, the University and key stakeholders as an effective and efficient national data centre

**Strategic Objectives for 2014**

5. Deploy the right people and resources
6. Ensure effective business intelligence
7. To have realigned EDINA with Jisc transition
8. To have enhanced EDINA’s structures and processes

**3. Finance and Sustainability**

We aim to ensure our sustainability into the long-term.

3.1 Capitalising on the excellent reputation of our staff and their product
3.2 Facilitating understanding and healthy growth by strategic partnerships
3.3 Securing resources and finance for activity, including succession planning
3.4 Prioritising diversification of income streams over the next three years

**Outcomes**

- Greater national and international recognition of the expertise of our staff and on-going business generation
- Sustainable data centre based on strategic partnerships, with income derived from a range of activities and funders

**Strategic Objectives for 2014**

9. Examine new business models for aggregating and delivering content and be financially sound in order to contribute to the successful strategies of Jisc and the University of Edinburgh
10. Contribute to Jisc’s mission in our role as ‘EDINA, centre of expertise and national academic data centre’
11. Contribute to the University of Edinburgh’s mission in our role as ‘EDINA and Data Library’
12. To have reviewed and implemented an appropriate and successful form of organisation and governance

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2. See Annex 2 for details
3. See Annex 2 for details
Our Offer to You

Lecturers and Teachers
You may be delivering higher or vocational education, or school-level education. You want to support students and pupils as they develop into creative and critical thinkers, becoming researchers in their own right or learning the fundamental skills they will require in the workplace. Our services can help you.

Students
We know from your feedback how much you value our services and how much time they save you in terms of your assignments. You recommend our services to others, because you find them easy to use and they supply the maps, data, films and images that you require for your work.

Researchers
We support you in your research, knowing from your survey responses that we save you time in finding relevant journals and other scholarly statements, and assisting you to do work that hitherto was impossible or cost-prohibited.

Librarians and Support Staff
We have been working with you and your colleagues for many years, and much of our success in meeting the needs of your researchers, students and their teachers is thanks to you and what you have told us. We know from your feedback how much you value our content services, which you advise your institution to purchase and then promote locally; and also our library middleware services, which save you a great deal of time.

Leaders and Senior Staff of Colleges, Universities and Schools
EDINA adds value to your organisations by developing and delivering shared content services and infrastructure that enable your staff and students to research, teach and learn at low cost. We also work to enable you to meet strategic objectives, such as improving the student or pupil experience; providing support for your Principal Investigators in research reporting and compliance with Funder mandates; commitment to open scholarship; and meeting university obligations under the European INSPIRE Directive.

Our Key Services

The Digimap Collections (digimap.edina.ac.uk), offering access to Ordnance Survey, historical, geological and marine maps and data, have become integral to teaching and research across a broad range of subjects in universities, colleges and learning providers. Only 20% of use is within geography-related fields, and lecturers, students and researchers report that they find them easy to use and time saving.

GoGeo (www.gogeo.ac.uk) collects together a wide range of geospatial resources and provides an easy introduction to metadata to encourage the management, sharing and reuse of geospatial data. Lecturers tell us that it adds interest, inspires ideas for practical lessons, and allows linking of academic resources to data available from the various Open Data initiatives around the world.

Jisc MediaHub (jiscmedia.ac.uk) provides access to over 500,000 still and moving images and sound from a variety of well-known content providers, including ITN, Getty, Channel 4 News, Channel 5 News, Wellcome Film and the Imperial War Museum. Content in the service is licensed in perpetuity under clear terms and conditions, and the service links out to other collections, providing an all-in-one resource.
For researchers, discovering and locating scholarly statement is key. **SUNCAT** ([www.suncat.ac.uk](http://www.suncat.ac.uk)) increases the visibility of specialist serial titles and lets you locate them, in addition to allowing you to click through the electronic table of contents to access the articles online. The **OpenURL Router** service ([openurl.ac.uk/docs](http://openurl.ac.uk/docs)) is the enabling middleware that links along the chain of discover, locate, request and access. Also working behind the scene are **The Keepers Registry** ([thekeepers.org/thekeepers/keepers.asp](http://thekeepers.org/thekeepers/keepers.asp)), **CLOCKSS** ([edinac.uk/projects/clockss_summary.html](http://edinac.uk/projects/clockss_summary.html)) and the **UK LOCKSS Alliance** ([www.lockssalliance.ac.uk](http://www.lockssalliance.ac.uk)) to ensure that you have continuity of access to e-journals.

Open Access is significant for maximal impact and compliance with Funder mandates. Support for institutional repositories is given by the components in the **UK RepositoryNet** ([www.repositorynet.ac.uk/blog](http://www.repositorynet.ac.uk/blog)) being built with funding from Jisc, and there is direct support for you to make your content open via **OpenDepot** ([opendepot.org](http://opendepot.org)) which will help you find the right repository for you. We can also support you as part of the Jisc Family in managing your data – see **MANTRA** ([datalib.edina.ac.uk/mantra](http://datalib.edina.ac.uk/mantra)) for access to self-learning modules.

The two **Statistical Accounts of Scotland** ([edinac.ac.uk/stat-acc-scot](http://edinac.ac.uk/stat-acc-scot)), covering the 1790s and the 1830s, are among the best contemporary reports of life during the agricultural and industrial revolutions in Europe. Useful around the UK, not just in Scotland, they contain key materials relating to the emergence of the modern British State and the economic and social impact of the world's first industrial nation.

**EDINA** now delivers Ordnance Survey digital mapping to schools. Feedback on the **Digimap for Schools** ([digimapforschools.edina.ac.uk](http://digimapforschools.edina.ac.uk)) service is overwhelmingly positive, with much emphasis on the simple and easy to use interface, and the teaching and learning opportunities that it facilitates. A wide range of free, professionally produced teaching materials has also been provided.

See all of our services and more about **EDINA** at our **website** ([edinac.ac.uk](http://edinac.ac.uk)).
Annex 1: Horizon Scan

Some of the main external factors affecting EDINA’s business areas are detailed below:

Mapping and Data

- The EU INSPIRE Directive, which is central to the implementation of geographic information strategies by regional and national governments, and the UK Location Programme, the UK’s response to the EU Directive
- The Scottish Spatial Information Board, which is progressing regulatory requirements and management for Scottish spatial information within INSPIRE and UK policy requirements
- Google Earth’s business model and apparent simplicity, which profoundly influences all other geospatial services, because it alters how people perceive and access geospatial data
- The availability of open geospatial datasets from Ordnance Survey and the ‘Free Data’ movements, and open philosophies and approaches in data, software and services
- Restrictions on the reuse of certain data by intellectual property rights
- The growth in location-based services and location-aware devices and growing recognition of the importance of ‘place’ as a means of searching for many different kinds of resources
- ‘Crowd sourcing’, e.g. where individuals participate in the capture and upload of spatial data, and ‘ground based data capture’, through laser scanning and ‘point clouds’
- The ‘Semantic Web’, connecting data across the internet by their semantics, or meanings – a major challenge for geospatial web services over the coming years
- The need for interoperability between different datasets and the enabling of mashups
- The requirement for a ‘discovery to delivery’ apparatus for data. Researchers need help to discover datasets and where to look for data
- Researchers requiring support to share and publish data

Reference

- Large commercial and not-for-profit players already working in this area, prompting EDINA to identify its added value for the community and work in areas not covered by the big players
- Jisc’s agenda, with other large players, for the provision of shared UK infrastructure to support education and research
- The open access agenda, spurred on by price and copyright issues, mandates for deposit into repositories, and informal links between authors and readers, especially via social networking
- Possible changes to copyright with respect to (1) orphan works and purpose of long term preservation (and access), (2) data and (3) applications such as text mining
- The Research Excellence Framework under way, which will complete by 2014 and decide allocations of research funding to institutions with effect from 2015-2016
- The role of social media in the discovery of research materials, and the democratisation of knowledge, which are continuing to increase
- The use of crowd-sourcing to elicit knowledge, not just from many people, but also from the one person who can assist the researcher in his/her search
• Requirements to link data to outputs and infrastructure required to enable scholars to obtain full-text

• The likelihood that research papers will be published in a more granular form so that citations are linked to the relevant parts of the paper, data are linked to tools that facilitate different forms of representation e.g. graphs or visualisation, and aggregations can be generated easily

Repositories and Preservation

• Ongoing threats to continuity of access to data and information, and the global/national/local attempts to counter them through various digital preservation methods

• Many smaller institutions having neither the capacity nor the knowledge required to address the problem of the preservation of research data

• Requirement for socio-technical infrastructure that supports the deposit, curation and maximal exposure of open access research literature

Multimedia

• Global multimedia services, such as YouTube and Flickr, and how EDINA’s services can be distinctive and cost-effective for the academic community in relation to them

• Developments in on-demand media

• Major cultural content projects, such as the BBC, National Archive, British Library and Europeana

• Digitisation programmes that create digital surrogates of physical objects

• Widespread production and issue of ‘born digital’ multimedia, especially within universities and colleges

Middleware and Infrastructure

• Jisc’s policy to deploy Shibboleth as the access management technology for authentication and authorisation across the science and education sectors

• New mechanisms such as cloud computing offering opportunities for cost savings and shared technical services

• Open source and open data agenda leading to greater transparency via machine interfaces and profusion of sources

• Data publisher models changing e.g. increasing delivery of data via Application Programming Interfaces (APIs)

• Maturation of Linked Data and the provision of machine-readable versions in parallel with human-readable resources

• Streams of machine-readable data with annotation and linking and formal publication, done by other services

• Advances in named entity recognition to do more “structure mining” from text documents, resulting in linkable data
## Annex 2: Strategic Objectives for 2014

### Activity/value proposition

<table>
<thead>
<tr>
<th>No.</th>
<th>High-level Objective</th>
<th>Includes:</th>
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</table>
| 1   | Deliver highly valued services to our sectors and ensure the sustainability of our digital resources in a volatile environment                                                                                           | • Working with others to engage with the business needs of universities and colleges  
• Continued positive engagement with:  
  • Users (researchers, students, teachers)  
  • Partners across ‘JISC Family’ and beyond  
  • Meeting the requirements of the home territories of the UK  
  • Considered engagement across pre- and post-vocational sectors of research, education and skills, e.g. continuous professional development and schools |
| 2   | Successful contribution to JISC activity and engagement, working closely with sector stakeholders to determine priorities that bring value                                                                                 | • Active in national and international leadership  
• Consultation with sector stakeholders  
• Development and delivery of data/content services; infrastructure services; futures services  
• Support JISC’s open and ‘walled garden’ agendas:  
  • Sustaining open access services  
  • Active support for licensed content |
| 3   | Successful contribution to the University of Edinburgh’s activity and engagement                                                                                                                                         | • Enhancing development and delivery of services within the University, and contributing expertise and reputational value  
• Through activity and partnerships, being part of the University’s internationalisation strategy  
• Formal recognition of research contribution made by EDINA staff |
| 4   | Continuous service quality improvement, applying technological advances to the presentation and integration of data                                                                                                   | • Critical appraisal of user feedback  
• Widespread adoption of ITIL  
• Optimise services for multi-platforms and for mobility  
• Embed services in user workflows and systems  
  • Research analysis  
  • Scholarly communication  
  • Learner-teacher activity |

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4. Objectives to be met by the end of December 2014

5. For example, the creation and improvement of the UK Spatial Data Infrastructure (SDI) with the UK Location Council, and towards an academic SDI in Europe

6. Including geospatial, reference, multimedia and repository services; data sharing and publication; and long-term access and preservation

7. For example, support for the UK Access Management Federation for Education and Research, with authoritative middleware, and providing technical support and tools for members, including schools; and ‘geo-enabling’ services across the JISC Digital Infrastructure

8. For example, UK RepositoryNet+ for research literature and related materials; and assisting UK universities to understand their obligations and opportunities under the EU INSPIRE Regulations
### Resources and context

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<thead>
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<th>No.</th>
<th>High-level Objective</th>
<th>Includes:</th>
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<tbody>
<tr>
<td>5</td>
<td>Deploy the right people and resources</td>
<td>• Improving recruitment and retention</td>
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<td></td>
<td></td>
<td>• Succession plan and process in place</td>
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<td></td>
<td></td>
<td>• Undertaking skills/age profile audit</td>
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<td></td>
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<td>• Securing adequate office accommodation</td>
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<td>6</td>
<td>Ensure effective business intelligence</td>
<td>• Customer Relationship model in place</td>
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<td></td>
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<td>• Mining internal data</td>
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<td></td>
<td></td>
<td>• Metrics and monitoring systems in place</td>
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<tr>
<td>7</td>
<td>Realign EDINA with Jisc transition</td>
<td>• EDINA’s identity and description</td>
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<td></td>
<td></td>
<td>• Readiness for new Jisc environment</td>
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<td>• Good relationships with new Jisc and its subsidiaries</td>
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<tr>
<td>8</td>
<td>Improve EDINA’s structures and processes</td>
<td>• Considering internal programme management structure</td>
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<td></td>
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<td>• Improving mechanisms for managing risk</td>
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<td></td>
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<td>• Improving internal sharing and reuse of libraries of software, expertise and reference data</td>
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### Finance and sustainability

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<th>No.</th>
<th>High-level Objective</th>
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<tr>
<td>9</td>
<td>Examine new business models for aggregating and delivering content, and be financially sound in order to contribute to the successful strategies of Jisc and the University of Edinburgh</td>
<td>• Using the Business Continuity Fund to:</td>
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<td></td>
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<td>• Invest for sustainability</td>
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<td>• Meet contingencies</td>
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<td>• Having appropriate business models:</td>
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<td>• Online services</td>
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<td>• Increasing income from projects and developments</td>
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<td>• Investigating new sources of income and business areas</td>
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<tr>
<td>10</td>
<td>Contribute to Jisc’s mission in our role as ‘EDINA, centre of expertise and national academic data centre’</td>
<td>• Being successful in planning and managing cost recovery despite uncertainty</td>
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<td></td>
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<td>• Securing Jisc income at similar level to current, with:</td>
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<td>• Direct funding for Jisc core services</td>
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<td>• Directed income for project/R&amp;D activity</td>
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<td>• Appropriate contribution to the Business Continuity Fund</td>
</tr>
<tr>
<td>11</td>
<td>Contribute to the University of Edinburgh’s mission in our role as ‘EDINA and Data Library’</td>
<td>• Financial recognition for increased support activity to the University of Edinburgh</td>
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<td>• Securing external funds in order to continue to gain leverage from University’s world-class ICT infrastructure</td>
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<tr>
<td>12</td>
<td>To have reviewed and implemented an appropriate and successful form of organisation and governance</td>
<td>• Review of Funding Agreement and Management Board</td>
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<tr>
<td></td>
<td></td>
<td>• Thinking with new perspective upon strategic partnerships that enable EDINA to attract new streams of funding</td>
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