ORCID Consortium Workshop

Lisbon, Portugal, 17 January 2018

Welcome to Lisbon!

João Nuno Ferreira

Diretor, Unidade orgânica da Computação Científica Nacional (FCCN)

Welcome and Introduction

Alice Meadows, Director of Community team
https://orcid.org/0000-0003-2161-3781

Matt Buys, Director of Membership team
https://orcid.org/0000-0001-7234-3684

Morning Program

0900   **Welcome and Introductions** Alice Meadows (ORCID) and Matthew Buys (ORCID)

1000   **Setting the Stage: A Short History of ORCID Consortia** Laure Haak (ORCID) and Josh Brown (ORCID)

1030   **Building Consortia: Top Down and Bottom Up** Neil Jacobs (Jisc), Guy Halse (TENET), Talita Oliveira (CAPES)

1100   **Discussion** moderated by Linda O'Brien (Griffith University)

1130   **Break**

1200   **Engaging Researchers** Elleina Filippi (Australian Access Federation), Paul Vierkant (Helmholtz-Gemeinschaft), Poul Melchiorsen (Aalborg Universitet)

1230   **Discussion** moderated by Katrine Weisteen Bjerde (CRIStin)

1300   **Regional Lunches with ORCID**

Afternoon Program

1400   Sessions by Participant Recommendation

- Rob Peters and Alcino Cunha: History and continued evolution of the ORCID API *(One-hour session)*
- Matt Buys and the ORCID membership team: Benefits of the member API for research institutions *(Repeating 30-min sessions)*
- Melroy Almeida, Elleina Filippi, and Gabriela Meijas: What is an ORCID Community manager? How is the work shared between ORCID and the consortium? *(Repeating 30-min sessions)*
- Jason Gush and Alainna Wrigley: NZ ORCID Hub *(Repeating 30-min sessions)*

1515   Coffee break

1530   Building a Community of Practice: The "ORCID Lifestyle" Joao Mendes Moreira (FCT), Jason Gush (Royal Society Te Apārangi), Paola Gargiulo (CINECA), Clare Appavoo (Canadian Research

1615   Discussion moderated by Celeste Feather (Lyrasis)

1700   Wrap Up: Linda O'Brien (Griffith University), Clifford Tatum (SURFmarket)

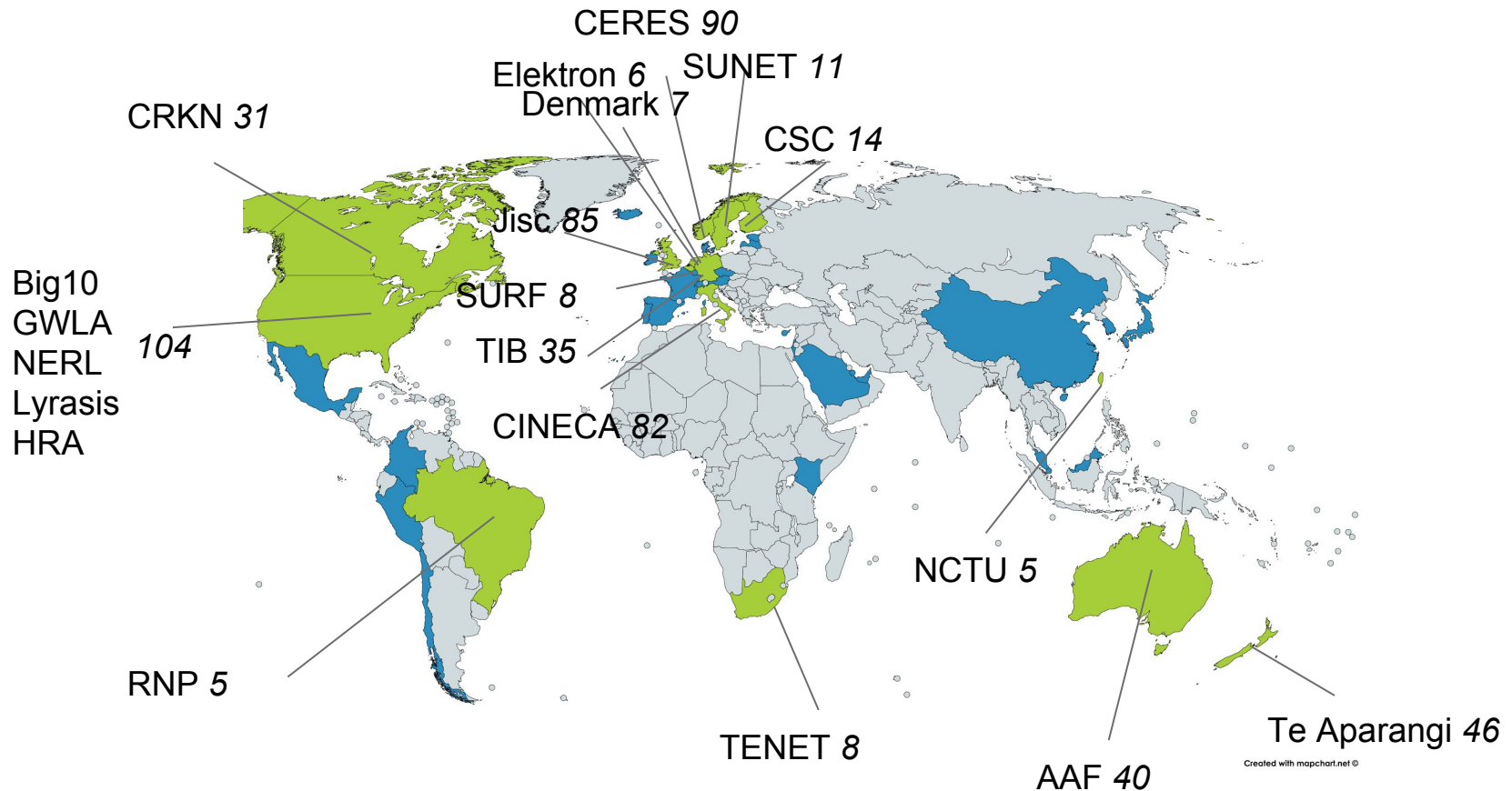**1745   Reception and Poster Session** and light buffet dinner

January 18 Program

0900-1200: Open Conversations with ORCID staff and consortia leads (sign up during registration)

Introductions

Consortium Members

CERES *90*
Elektron *6*
Denmark *7*
SUNET *11*
CRKN *31*
CSC *14*
Jisc *85*
Big10
GWLA
NERL
Lyrasis
HRA
104
SURF *8*
TIB *35*
CINECA *82*
NCTU *5*
RNP *5*
TENET *8*
Te Aparangi *46*
AAF *40*

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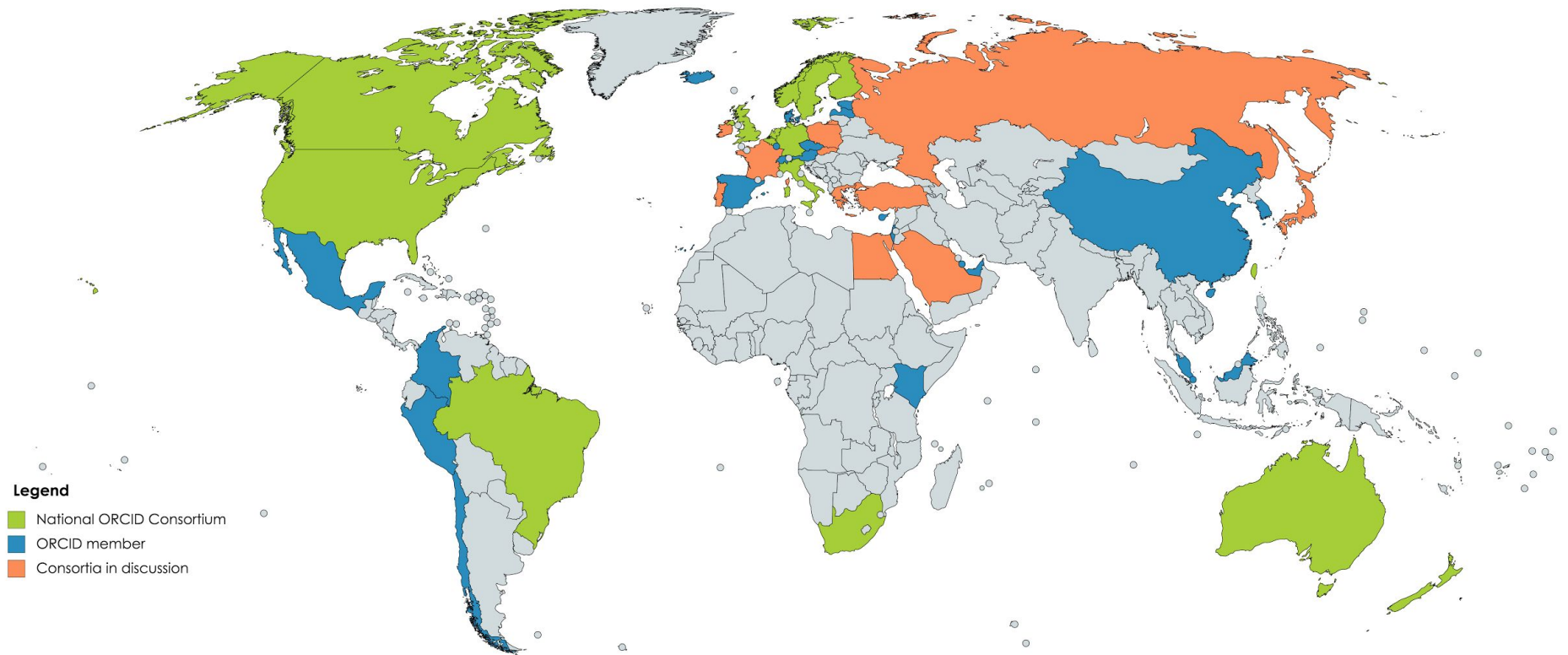
832 ORCID member organizations | 42 countries | 20 consortia (69% of members) | 16 countries

Consortia in discussion
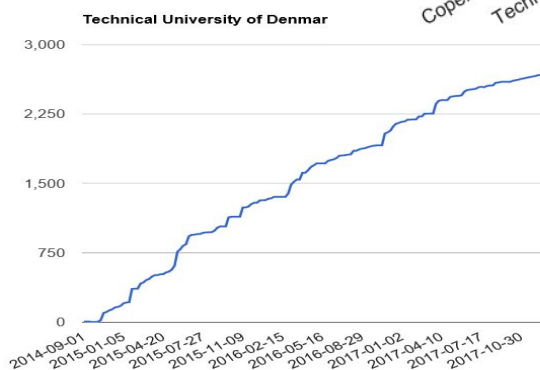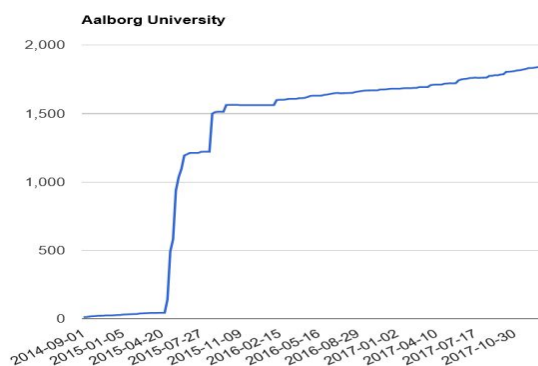

Legend
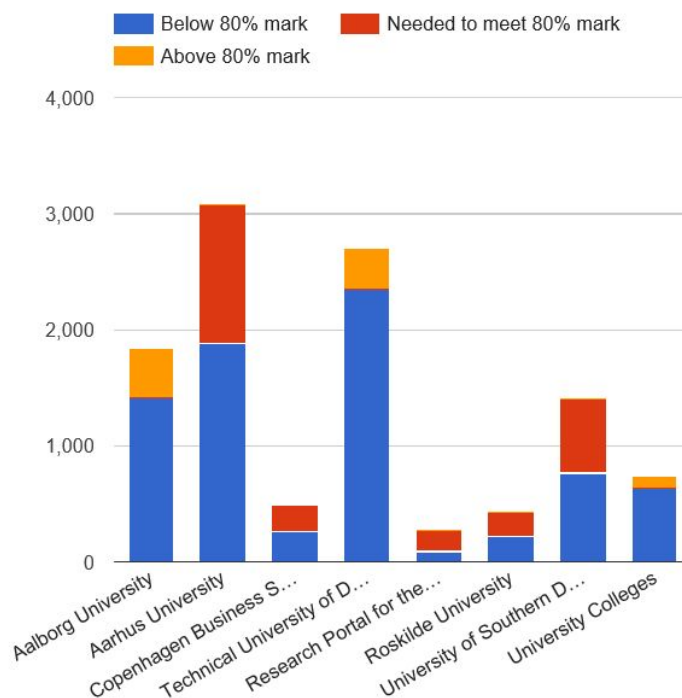- National ORCID Consortium
- ORCID member
- Consortia in discussion

Belgium II | Egypt | France| Greece | Ireland | Japan | Turkey | Poland | Portugal | Russia |Saudi Arabia | Slovakia

Created with mapchart.net ©

DENMARK

- Aalborg Univ.,, Poul Melchiorsen
- Members: 8 universities, 9 university colleges
- Integrations (export from Pure): 9??
- **Success:** Startup cooperation and implementation of ORCID in DK
- **Challenge:** To keep up with new possibilities with ORCID and inform about ORCID/these possibilities in DK

Biggest Success: Shared systems and collabration

Legend:
- Below 80% mark (blue)
- Needed to meet 80% mark (red)
- Above 80% mark (orange)

Categories: Aalborg University, Aarhus University, Copenhagen Business S..., Technical University of D..., Research Portal for the..., Roskilde University, University of Southern D..., University Colleges

Aalborg University

Technical University of Denmar

Challenge: To keep up the growth!
Experience: The challenge gets smaller and smaller!
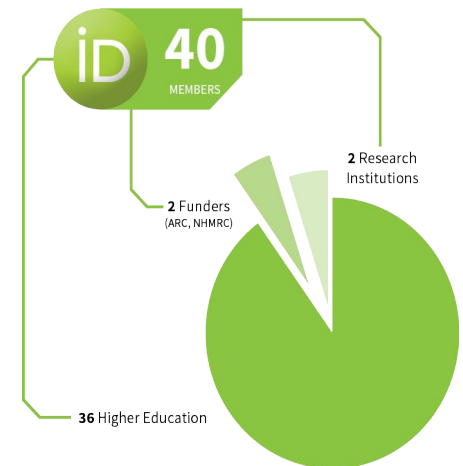
UK ORCID CONSORTIUM

- Jisc: Neil Jacobs
- 85 members
    - 83 universities,
    - One funder and
    - One infrastructure centre
- 51 live integrations (in 47 members)
- Biggest success to date:
    - Enthusiasm and collective will of community to make this work in UK
- Biggest challenge to date:
    - System/technical, and researcher buy-in

ORCID-US

- LYRASIS, Celeste Feather
- Formed through collaborative effort by 5 library consortia, includes majority of top 100 US research institutions
- 86 universities and 1 research center
- Number of live integrations: ?????
- Biggest success: Collaborating to form an ORCID-US community at national scale
- Biggest challenge: Collaborating to form an ORCID-US community at national scale

iD

AUSTRALIAN ORCID CONSORTIUM

- Australian Access Federation
  - Elleina Filippi Service Delivery Manager
  - Melroy Almeida Technical Support Analyst
- 40 Members
  - (2 new members anticipated for 2018)

- 29 live integrations
  - 9 integrations in test
  - 5 planning integrations

- Biggest success:
  - National approach to ORCID uptake, integration and awareness.
- Biggest challenge:
  - Growing the Consortium. Internal member processes and timeframes.

iD **40** MEMBERS

2 Research Institutions

2 Funders (ARC, NHMRC)

36 Higher Education

FINNISH ORCID CONSORTIUM

- CSC – IT Center for Science Ltd.
  - Walter Rydman, 0000-0002-3875-4874
- 14 (universities, research institutes, hospital districts)
- 1 (CSC's own, not counting members)
- Success: Universities actively promote id's. Used to ease administrative burden
- Challenge: Coaxing public funders to embrace id's in their systems.

ORCID @ ELEKTRON

Non-profit member organisation, manages e-resource consortium acquisitions for 23 participants, 6 of which are ORCID members.

Pure, Symplectic

- KU Leuven
- VUB Free U Brussels
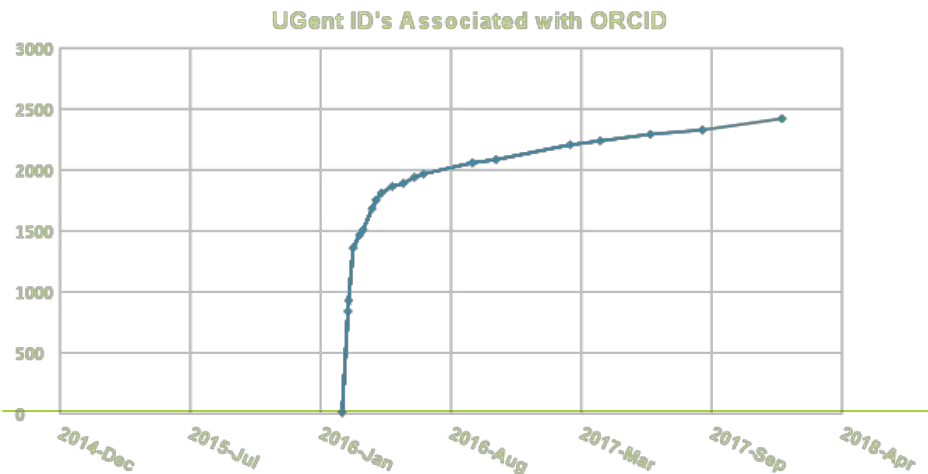
C&C interface from institutional repository

- Antwerp University
- Ghent University
- Universiteit Hasselt

Funder's administration

- FWO

Biography, bibliography sync

- Ghent University

UGent ID's Associated with ORCID

Dries Moreels, Ghent University Library
0000-0002-5297-1074

Cartoons by Patrick Hochstenbach
0000-0001-8390-6171

ORCID-NL, NETHERLANDS

- SURFmarket: Clifford Tatum and Pim Slot
- Consortium: 8 Research Universities (goal = 14)
- Live integrations = 5 (4 Pure and 1 Converis)
- Biggest achievement: DAI ➔ ORCID Pilot ➔ Consortium
- Biggest challenge(s) to date:
    - CRIS venders (integration)
    - future benefits vs near-term needs

NEW ZEALAND ORCID CONSORTIUM

- Royal Society Te Apārangi represented by Jason Gush
- 47 members currently, with up to 99 anticipated thanks to government support.
- Current members span: universities; institutes of technology and polytechnics; government research organisations; independent research organisations; health boards/hospitals; and, funders.
- Current number of live integrations is 12 via Hub, six via CRIS and one house built integration.
- Biggest success: New Zealand ORCID Hub launched 2017.
- Biggest challenge: extending the NZ consortia to all sectors of the NZ research environment.

ORCID GERMANY CONSORTIUM

- German National Library of Science and Technology (TIB) and the ORCID DE Project represented by Britta Dreyer and Paul Vierkant

- 35 members: and type(s), for example, 20 universities, 10 research centers, 5 national and state libraries

- 2 live integrations

- Success: Reaching the target of 35 members in January 2018

- Challenge: Confidently explaining integration options/workflows and corresponding benefits

SUNET ORCID CONSORTIA

- Consortia lead organisation: The Swedish National Research and Educational Network SUNET
- Consortia lead: Pål Axelsson, pax@sunet.se
- Number of members: 11 member primarly universities but also the government agency Swedish Research Council
- 2-3 new members are possible under 2018
- The SUNET ORCID Consortia is about one year and we have had a couple of workshops to learn about ORCID and get to know each others
- There very few working integrations in place right now but there is some planned
- Biggest challenge: General Data Protection Act

ORCID-CANADA

- Lead organization: Canadian Research Knowledge Network (CRKN)
- Representatives: Gloria Booth-Morrison (Member Support Specialist, ORCID-CA) and Clare Appavoo (Executive Director, CRKN)
- Members: primarily universities, some hospitals and research institutions
- Integrations: 3 live
- Biggest success to date: collaboration between multiple stakeholders from the Canadian digital research ecosystem to form the consortia
- Biggest challenges to date:
  - agreeing on a structure for the consortium with multiple stakeholders
  - encouraging the move from membership to live integration

TENET (SOUTH AFRICA)

- Consortia lead organization: **Tertiary Education and Research Network of South Africa (TENET)**
- Representative(s): **Guy Halse**
- Number of members: **8 universities, 1 research council** Eligible: 25 universities; ~ 8 research councils
- Current number of live integrations: 2 + 3 in planning
- Biggest success to date: **getting the consortium going; co-hosting our first event**
- Biggest challenge to date: **dealing with different parts of institutions – library vs research office vs central IT**

NORWAY

- CERES
  - Katrine Weisteen Bjerde – Director of Research Services
  - Jon Nornes – Member contact/Senior Advisor
  - Yamuna Vallipuram – Developer/Scrum Master
- ≈99 members: Universities/University Colleges, Special care hospitals, Research institutes, Research Council of Norway
- No current integrations – Contract signed in December
- Biggest success to date: Getting hold of funding ☺
- Biggest challenge to date: Finding out what to do next!

BRAZIL

- Consortia lead organization: CAPES (Brazilian Agency for Support and Evaluation of Graduate Education) – Responsible: Talita Moreira de Oliveira
- Members: 5 (3 federal agencies responsible for funding and support of research and graduate education, 1 Council of state funding agencies and 1 Scientific Electronic Library). Signed up in December 2017
- Biggest success to date: Join the most important funders and holders of scientific information in Brazil
- Biggest challenge to date: Understand how each system works and how to integrate them using ORCID as a hub

PTCRIS

- João Mendes Moreira, Head of Scientific Information
- ORCID is/will be used in: FCT grant mng. system (2014), Statistics bureau (2016), national open access infrastructures (2Q2018), national CV system (2Q2018), Local CRISs: ISCTE-IUL (2016), more to come soon
- Success:
  - **ORCID mandatory in the RAE** (2013, 2017)
  - **Over 90% of PT researchers have an ORCID**. Their records are populated (RAE mandatory) with publications
  - **PTCRISync a framework** that makes it easier to "**enter once, re-use often**"
- Challenges: **Human resources** and **change management** (IT and Business People; systems)

Setting the Stage: A Short History of ORCID Consortia

Laure Haak, Executive Director
https://orcid.org/0000-0001-5109-3700

Josh Brown, Director of Partnerships
https://orcid.org/0000-0002-8689-4935

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ORCID Launch
Oct 2012

2013　2014　2015　2016　2017

2012 ORCID Membership - Single organizations only

ORCID Launch
Oct 2012

Group
Membership
announced

2013   2014   2015   2016   2017

Madroño
Jan2014   Denmark
Sep 2014

CBUA
Oct 2014

2013 - added group membership policy

ORCID

Connecting Research
and Researchers

ORCID Launch
Oct 2012

Group
Membership
announced

Consortium
Banding Policy

2013   2014   2015   2016   2017

Madroño
Jan

Denmark
Sep

CBUA
Oct

CINECA
(June)
Jisc
(June)

Big 10 (Sept)
GWLA (Oct)
NERL (Nov)

2014 - community consultation on models to improve incentives to grow consortia
2015 - launched consortium banding policy, new consortium member agreement, and
advice for consortium support

ORCID Launch
Oct 2012

Group
Membership
announced

Consortium
Banding Policy

2013   2014   2015   2016   2017

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(June)

Jisc
(June)

Big 10 (Sept)
GWLA (Oct)
NERL (Nov)

AAF (Jan)
NCTU (Mar)

CSC (May)
Elektron (Jun)
SURF (Jun)

RSNZ (Oct)
TIB (Oct)
Sweden (Dec)

2016 - instantiated Board committee to study consortium banding policy

ORCID
Connecting Research
and Researchers

Membership
and Fees
Committee
report

Consortium
R&R and
Webpages

ORCID Launch
Oct 2012

Group
Membership
announced

Consortium
Banding Policy

Consortium
Survey

Updated ORCID
Consortium
Agreement

2013   2014   2015   2016   2017

CINECA
(June)

AAF (Jan)
NCTU (Mar)

RSNZ (Oct)
TIB (Oct)
Sweden (Dec)

Madroño
Jan

Denmark
Sep

Jisc
(June)

RNP (Dec)
CERES (Dec)

CBUA
Oct

Big 10 (Sept)
GWLA (Oct)
NERL (Nov)

CSC (May)
Elektron (Jun)
SURF (Jun)

Lyrasis (Oct)
CRKN (Mar)

2017 - launched consortium survey, clarified roles and responsibilities, created consortium webpages, test run of member self-management pages
2018 - first-ever consortium workshop, updated ORCID consortium agreement, regional communities of practice as a core strategy

Our Objective: Building Communities of Practice

Enjoy meeting!

Consortium Awards

- **Jisc -UK:** Kickstarter award, for pilot model and cost benefit analysis
- **CINECA-Italy:** Toolbuilding award, for one-stop integration and time-savings analysis
- **AAF-Australia:** Inspired engagement award, for governance, support staff, and cost recovery model
- **Royal Society Te Aparangi - New Zealand:** Inclusiveness award, for national policy and NZ Hub
- **TIB-Germany:** Attention to detail award, for privacy analysis