ICEDIS Meeting at UKSG Harrogate
Harrogate International Centre, Harrogate, UK
Wednesday 12th April 2017

Minutes

1. Welcome and introductions

Henning and Laurie opened the meeting and welcomed participants, who each introduced themselves. A list of participants can be found at the end of these Minutes.

2. Minutes of previous meetings

The meeting reviewed Minutes of the two previous meetings – at Frankfurt (October 2016) and at the Charleston Conference (November 2016). No changes were noted, although **Tim asked that any observations be sent to him after the meeting**.

3. Getting the most out of ONIX-PC

3.1. Producers and consumers of ONIX-PC metadata

- CUP and Elsevier – both supported by systems vendor Vista/Ingenta – are working with LM Info to test new (CUP) or amended (Elsevier) feeds. **Tim was asked to set up a conference call** involving these players to resolve any remaining questions.
- Harrassowitz is testing message receipt with several partners.
- Wiley is in the process of moving to a new internal system (SAP) and thus needs to re-implement ONIX-PC within this new framework. The current 'product and pricing' features will be in place for subscription year 2018 and Wiley is looking at moving to v1.2 in this round, thus making available open access features too.
- LM Info is using ONIX-PC and is keen to speak to other implementing publishers.
- EDItEUR can and will look at sample files and give critique/advice but is not able to give a formal 'seal of approval' on compliance with the standard. There is value to EDItEUR remaining involved so that we can see how the standard is used, make sure we understand the implicit business rules and feed ideas into version updates.
- Advantage CS is not currently working on ONIX-PC but would be ready to do so if its clients so wish.

3.2. Driving usage – connecting use cases with ONIX-PC features

- ONIX-PC was originally intended for 'product and pricing' features of paid-for subscription products. Version 1.2 included additional elements to allow description of OA products too. In answer to a question, Tim promised to check whether continuous publication is supported.
- Keith asked how we might best drive further usage of the standard. He spoke of the ideal situation where we might move everyone in the industry instead of one-by-one migrations. We need to renew our focus on which business problem(s) we are trying to solve and locating 'pain points' that we could potentially solve. What are the advantages of ONIX-PC over other mechanisms? There need to be **more use cases and case studies written up**.
- Henning mentioned ways in which ONIX-PC implementation has been used by Springer Nature to merge data and clean it up in a consistent way.

- Knowledge bases (KBs) might well be able to derive useful price-related data from ONIX-PC fees, as well as the 'product description' features. Lots of the feeds populating KBs now rely on KBART, but there may be other information of value in ONIX-PC – this needs some investigation.
- ONIX-PC can accommodate various transfer-related information that is not present in KBART and it could be interesting (Jisc and Harrassowitz both mentioned this) if it could be used to clarify title history – including elements like title changes, former titles, mergers, splits.

3.3. Recap on enhancement requests
- There is an outstanding request to consider enhancing ONIX-PC so that it can handle EU tax and bundle-split issues, based upon tax legislation and the values that are assigned by publishers to e.g. print and online components of bundled products. **Tim said that he would progress this after the meeting** and call for interested EDItEUR members to participate in the effort.
- Another suggestion had been to use ONIX-PC as a means to send metadata to DOAJ, but this is not a current priority.

4. ICEDIS nearing 30! Time to consider linked open data?
As we move toward the 30th Anniversary of the original ICEDIS work, it seemed timely to consider changes that might make ONIX-PC more relevant and compelling to the scholarly supply chain. In particular, we spent some time discussing the realm of Linked Data/Linked Open Data and whether or how ONIX-PC might become a useful contributory mechanism.

Linked Data (LD) involves representing information in so-called 'triples' of subject, object and a linking predicate or relationship between them, all expressed as URIs. If this Linked Data is also freely available then it is referred to as Linked Open Data. (The terms 'Linked' and 'Open' are, strictly, independent concepts.)

Content expressed now in ONIX-PC could also be represented in LD. And such metadata should also be open, since it deliberately replicates information that is already in the public domain. Extensions of LOD to include personal data can be intensely political, owing to the need to conform to data protection and privacy regulations. This is unlikely to be a concern for ONIX-PC, since the only 'personal' metadata should (if at all) be author names.

Linked Data itself should be apolitical. It is good and potentially valuable to freely interconnect identifiers such as DOIs, ISNIs, ORCIDs etc. and other serials data. ONIX-PC should be part of that discussion – it is a robust and extensible model, potentially of interest to librarians and others in the supply chain, even though few if any tools are yet available. We should seriously consider making ONIX-PC metadata open and linked in this way.

It could be worthwhile to evaluate ONIX-PC against other standards for Linked Open Data for catalogs, and particularly we should track directions and possible steps in the eventual adoption of BIBFRAME in the library community. BIBFRAME is explicitly framed in Linked Data syntax and so is very different structurally to MARC.

EDItEUR will do some initial work to define which steps would be necessary to achieve an LD expression of ONIX-PC and then we will return to this topic in the next ICEDIS meeting.

5. Key developments at member and invited guest organizations – informal round table

Attendees were invited to share information where appropriate on initiatives of interest to the ICEDIS/EDItEUR community. Items reported included the following (in note-form only):

- Wiley – System change is currently taking most of the time.
- Harrassowitz – piloting ONIX-PC; technology change; looking at linked data; redoing title database for monographs; API transmission – exchanging real-time data with books. Graham suggested Harrassowitz look at EDItX for parts of the message used for BIC Real-time communications.
- JISC/KBART – Presentation about adoption and creation of metadata, as well as presentation of good metadata by the system vendors. Supply chain issue – must move through and make sure that all sides are involved, and focus more on the system vendors; more about how to use KBART (webinars) KBART to ONIX and ONIX to KBART.
- Ringgold – About to release a new platform – being tested now; upgrades to location data (linked with Google).
- Kinokuniya – Considering ONIX-PC; could evaluate later this year and intend to ask for sample files again from Wiley, Springer and Elsevier.
- Ingenta – Has a client live on ONIX 3; can now also accept ingests in v3 format; will try to publicize further.
- Elsevier – growing digital business with some re-branding; best use of content through technologies; help customers with actionable answers.
- Sage – Encouraging agents to send data using ONIX; back office systems moving onto VISTA platform.
- ISSN-IC – Working on new ISSN Portal; in September, linked data and some parts as Linked Open Data – essential ISSN data freely open (ISSN, Title, Country, Medium); project to automate and centralize ISSN assignments for part of the Springer list and give Springer ISSN and Key Title. Expedited handling for new ISSNs; coordinated with National ISSN Centres, in this case in Germany.
- LM – interested in meeting again with CUP and Elsevier.
- Springer – Very involved with Linked Open Data initiatives, SciGraph etc.

6. Related standards initiatives

Laurie presented a very useful round-up of various standards initiatives, based in part on information about NISO projects supplied by Todd Carpenter.

6.1. Authentication systems

NISO and the STM Association have launched a joint initiative to improve the user experience of authentication to subscribed resources. The Resource Access in the 21st Century (RA21) initiative is developing a series of pilots to improve the experience of connecting people to their appropriate identity provider (i.e., the "Where are you from" or WAYF discovery problem). We are seeking publishers, vendors and libraries interested in engaging in those pilots. More information about the effort is on the RA21 website: http://www.stm-assoc.org/standards-technology/ra21-resource-access-21st-century/

6.2. Ebook Metadata

This new NISO initiative will collect the minimal metadata requirements necessary to describe e-books in order to support sales, discovery, delivery, de-accessioning, and preservation, and identify the most effective and efficient way for metadata to be moved through the entire supply chain. This project will help the creators and managers of bibliographic records to cooperate to minimize duplication of work and ensure overall quality of metadata. The Working Group has recently started its work, which will include a research phase gathering input from all contributors to the supply chain lifecycle. Watch this space! as more news is expected as the group gets fully underway in its remit.

6.3. Flexible API Framework for E-Content in Libraries
This work will modernize library-vendor technical interoperability using RESTful Web service APIs and standard mobile application intent calls, using the Queens Library API Requirements as an initial draft. This working group, which was formed in December, will create a foundation API set that the library industry can build on to fulfill an array of user and library needs, including quicker response times, flexible item discovery and delivery options, improved resource availability, and more seamless integration of electronic and physical resources.

6.4. Tracking Link Origins in Networked Information Environments
This project aims to develop a NISO Recommended Practice to help libraries, publishers, and other content providers to accurately track the sites/platforms from which incoming links originate when they pass through a link resolver. Where content hosts utilize HTTP analysis to determine where users started research, links coming from link resolvers will represent the domain of the link resolver and not that of the platform where the user originated his/her search. Recommendations for actions or configuration instructions can better credit the originating platform, helping publishers and librarians to appreciate this part of the search picture. The Working Group is investigating options for passing the link origin information to publishers and implementation of one or more proof-of-concept projects to demonstrate proposed techniques.

6.5. Enhancing KBART for Automated Exchange of Title Lists and Library Holdings
NISO Voting Members recently approved this proposal, which would extend the KBART Phase 2 Recommended Practice to support individual library holdings of electronic products and automate the request and retrieval of KBART reports for title lists and library holdings. It is expected that this working group will work closely with the KBART Standing Committee. Work is expected to include the creation of a schema that would allow KBART data to be represented in JSON or XML, and consideration of leveraging the SUSHI-Lite specification as the mechanism for transport of KBART in JSON format.

6.6. Altmetrics
NISO will be organizing a standing committee to build on the work of the Altmetrics initiative that NISO published last summer.

6.7. ISO TC 46 Activities
- The ISBN standard is completed and awaiting publication. This is pending the agreement of a registration authority contract between the International ISBN agency and the ISO Central Secretariat.
- There is a new work item that has been approved to develop an international standard for display and transmission of rights information. This isn't a standard for markup of rights information, but rather is focused on human readable display of rights information on content pages.

- There is a proposed revision of the standard for bibliographic references.
- A revision of the ISSN standard has been launched, led by the ISSN International Centre.
- ISO-8 – Revision is being drafted, aiming toward a first draft to the technical committee by end of June; ISO Standard is incorporating content from PIE-J (NISO Recommended Practice – Presentation and Identification of Electronic Journals) to ensure that print and e-periodicals are represented.
- ISSN Revision – New vote was Yes so the working group is officially created and can move ahead. The first meeting was introductory; others will be scheduled soon. There are two main considerations: Very important to determine the Scope of ISSN assignment in the revision – editions in digital world; print plus online OR print plus PDF plus Digital plus [other formats]. ISSN for families of serials similar to the ISSN-L, which links titles of various medium types. Need to determine link between ISSN-L and a family; would have all title history and local or regional editions of a serial aligned. Need to consider publisher standards and metadata available.

7. Persistent and robust identifiers

There continues to be activity on party IDs – ORCID is looking to expand into scholarly monographs, where of course there may be some overlap with journal authors. In the organizational space there are many ways to identify organizations (whether these be corporations, institutions, brands, etc.), including ISNI, Ringgold, GRID ID (using GeoNames IDs, NUTS3 regions, WikiData IDs, CrossRef Open Funder Registry IDs, and links to country-specific IDs like UCAS codes, UKPRN numbers, HESA codes and more) or proprietary identifiers such as the Ringgold ID, plus others in the works.

8. News from EDItEUR

Graham Bell attended the meeting and reported on EDItEUR's wider activities on metadata and identifier standards.

Thema is an international subject category system for books; 160 country schemes. Thema can work for anybody although it may not be a perfect fit in all cases. Update in several countries in Europe in V 1.2; not as big an uptake in US or Canada; support for over 20 languages. Amazon Internal Browse by Scheme will use Thema in Europe.

Although ONIX use is pretty ubiquitous globally, ONIX 3.0 version adoption is quite slow. Minor revisions over last 8 years; latest was 3.0.3; next version around Q1 2018 will have about 10 new elements. Issue 37 code list is the first version that is not compatible with ONIX 2.1. Issue 36 is the last code list that works with ONIX 2.1, as part of a deliberate 'sunsetting' of the previous version of the standard.

EDItX – transactional and trade focused; works with ebook sales and physical inventory; reports; working on improved documentation and extension to ebooks of concept of "inventory" to determine what is missing – PDF or Metadata, e.g. – to determine why an ebook isn't available for sale

9. Other business and date of next meeting

Tim asked for any other business. Harrassowitz asked whether EDItEUR was interested in standards for Financial and Business Process Compliance. The EDItEUR team does not have any particular expertise in this area but **several members agreed to think about which might be the right organization** to create an internal system that would lead to a certificate of compliance.

The next ICEDIS meetings currently planned will be at the Frankfurt Book Fair (9th October 2017) and the Charleston Conference (provisionally, 7th November 2017).

Laurie and Henning thanked participants and declared the meeting closed.

10. List of participants

Adrian Galwin	Cambridge University Press
Clément Oury	ISSN-IC
Dan Heffernan	Advantage-CS
Debbie Maries	Cambridge University Press
Graham Bell	EDItEUR
Greta Boonen	Wiley
Henning Schoenenberger	Springer Nature, co-chair
Hiro Kano	Kinokuniya
Keith Whiter	Elsevier
Kim Steinle	Duke University Press
Laurie Kaplan	ProQuest, co-chair
Magaly Bascones	Jisc
Monika Schneider	Harrassowitz
Peter Morley	Vista/Ingenta
Phil Nicolson	Ringgold
Tim Devenport	EDItEUR & ISNI-IA
Tony Davies	Sage Publications