

# Executive Director's Report to Members: November 2009

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## 1 Standards development

### 1.1 ONIX for Books Release 3.0

The first major release of our flagship standard since 2004 proved – perhaps predictability in hindsight – to be a much larger task than had initially been anticipated. There were also some challenges in managing changing requirements and priorities set by national groups. However, “ONIX 3” was successfully launched in the middle of April and work has continued on finalising documentation and correcting small errors ever since; we have also released Code List Issue 10, which both extends Issue 9 to cover the new values required for Release 3.0, while also updating code list requirements for Release 2.1.

BISG in the US arranged two major webcasts on Release 3, in successive weeks in July and August. David Martin and I presented the first; Richard Stark of Barnes and Noble (the Chair of the BISAC metadata committee, and in that role the leader of the US ONIX for Books community) presented the second. There were over 100 people on each call.

There is considerable enthusiasm for Release 3.0, and we hear that (particularly in the US) people are moving towards implementation, although we do not anticipate that that the major aggregators will be announcing implementations before 2010 Q1. The first publisher to tell us that they were able to create messages in Release 3.0 format did so in September.

Documentation is continuing with respect particularly to describing digital products..

### 1.2 ONIX for Serials

The major driving force for our serials work is currently coming from ICEDIS (the International Committee for EDI in Serials). Earlier in the year – and extremely quickly – we completed work on an adaptation of the ONIX-SPS message to accommodate the requirements of ICEDIS for the communication of the annual set of pricing information between journal publishers and subscription agents. This was implemented and employed by at least one major journal publisher for their pricing information in July this year.

Following extensive surveys of the membership, we have now laid out a roadmap for the next phases of ICEDIS development which was approved in principle at a meeting immediately before the Frankfurt Book Fair. This will provide us with a plan of work extending over several years – and just as importantly will allow ICEDIS members to plan their own implementations over an extended period. We have found that the lead times on technical implementation of new or revised standards can be very extended indeed if they are not planned well in advance.

We are continuing work on extending the existing ONIX for Serials formats to cover ebook subscriptions.

### 1.3 ONIX for Identifier Registration

ONIX for ISTC Registration has been finalised and published in v1.0. This work was undertaken for the International ISTC Agency.

We are waiting instructions from the International ISBN Agency for updating ONIX for ISBN Registration messaging – this appears likely to become more important with the implementation of ISBN by supply chain intermediaries.

### 1.4 ONIX for Licensing Terms

#### 1.4.1 ONIX for Publication Licenses

Although there continues to be considerable support for ONIX-PL at the conceptual level, we are continuing to find it hard to get traction for implementation. There are a number of reasons for this, but perhaps the most telling is the difficulty of achieving real “pull” from the market, in other words from librarians. In many ways, the creation of a messaging standard (however complex and difficult that may be) is easy in comparison with the development of the technology to create and ingest the messages at each end of the communication. While there is an undoubted willingness on the part of vendors of ERM systems to implement an ability to ingest ONIX-PL, in the absence of real pressure from libraries to provide them with this feature, the priority (from the vendor point of view) remains just a “nice to have” feature. There are also problems with finding anyone in publishing houses who has the explicit responsibility (let alone the rather unusual skill set) for managing licence encoding.

The recently completed JISC-funded RELI project demonstrated the potential of ONIX-PL encoded licences to provide licence information to users “at the point of use”. We expect this to become a valuable tool for “selling” ONIX-PL to librarians during 2010. At the same time, we continue to have substantive support from the NISO-EDItEUR Joint Committee for ONIX-PL.

We have recently been undertaking a project on behalf of EDUSERV to encode their standard licences in ONIX-PL. We have also undertaken a draft expression of SERU in ONIX-PL, and we are waiting for feedback on that from the relevant NISO committee.

#### 1.4.2 ONIX for RROs

The two messages developed for IFRRO – ONIX for Repertoire and ONIX for Distribution – are both now in daily production use, and are being adopted by a wider group of IFRRO members round the world.

#### 1.4.3 Other ONIX-LT developments

Some of our most active current work lies in the growing requirement for rights transaction messages. We are subcontracted to the European ARROW project; our main task is to supply a suite of messages around the licensing of digitisation by libraries (including the management of “orphan works”). We have also recently been approached by BISG about the development of standard messages for the support of communications with the Book Rights Registry (expected to be established if the Google Book Search settlement is agreed). BISG has now established a rights metadata committee with an even wider remit than this, with which we will be working closely to avoid any duplication of effort.

We are optimistic that all the required messages will be developed within the ONIX-LT framework. They will obviously draw on our experience of developing ONIX for RROs, and will use elements of these messages. There is likely to be some (but not complete) congruence between the requirements for ARROW and those for the BRR.

The critical issue for EDItEUR will be to ensure that all our messages continue to be developed in a coherent and interoperable manner, and are not drawn too narrowly for the specific requirements of a particular constituency at a single point in time.

## 1.5 EDI

### 1.5.1 Survey

We have recently received a report from a survey undertaken for us by a consultant on the implementation of EDItEUR's EDI messages, both EDIFACT and our own EDItX XML EDI standard. The general message has confirmed our starting expectation that future development planning should focus primarily on EDItX. We will be conducting further research with the membership to confirm our plans.

### 1.5.2 EDItX

We continue to receive requests for extensions and revisions to EDItX messages. In the main, these have been coming from Continental Europe, but we have recently had a significant enquiry from North America. Unsurprisingly much of what we are being asked to do relates to commercial messaging around digital products.

### 1.5.3 Web services

We have recently had renewed interest in standard web services to provide the transport layer for EDItX; work on this is being undertaken in Denmark, and we are optimistic that we may be able to build on this (and work undertaken by BIC in the UK) to build some international web service standards during 2010.

## 1.6 EDItEUR standards validation

One of the issues which we find becoming more pressing is the development of better technical tools for message validation and compliance. While in ONIX for Books we largely leave compliance activities to national committees (like BISG and BIC), there is room for us to provide better tools to support those activities, as well as compliance testing for other parts of our standards portfolio.

Starting with ONIX for Books Release 3.0, we will be developing more sophisticated tools (using ISO standard RELAX-NG and Schematron) which can test for compliance with more complex business rules than either Schema or DTD. We are continually seeking to improve the tools we make available to support consistent high quality implementation of EDItEUR standards.

## 2 Other standards activities

### 2.1 International ISBN Agency

There is one area where EDItEUR and ISBN are experiencing a common set of problems: the identification of ebooks. We have been involved in a number of presentations about the

issue, particularly in the United States. There are areas in both the trade and library supply chains where identification requirements are still inadequately defined – and maybe cannot be known in view of the lack of maturity of the market. But these have critical impact on the future of a number of EDItEUR standards.

It is important to pull apart short term implementation problems from long term strategic issues. It was clear from a poll taken at the end of a recent BISG webinar that the biggest single challenge to managing ebook identification is currently rooted in systems issues (both metadata management and workflow); however there are also more complex issues in play.

## 2.2 Other standards

During the last 6 months, EDItEUR has devoted time to a number of other standards issues of concern to the membership; these include:

- ISNI ( the international standard name identifier, currently an ISO DIS); particular concern about the application of ISNI to publisher identification
- Interoperable DRM for ebooks – a project led by the UK Digital Directors group, but clearly with international ramifications
- Some of our ebook work is being knitted together through a closer working relationship with the IDPF, with which organisation we exchanged reciprocal membership earlier in the year; we did yet another webcast on ONIX for Books Release 3.0 for the IDPF membership early in October.
- ONIX for Books and MARC interoperability has become an increasing issue during the course of the year, as more publishers are finding themselves under pressure to deliver valid MARC records to libraries as part of providing “shelf ready” ebooks. OCLC has completed a mapping and are offering a conversion service (“ONIX to MARC and Back Again”); we hope to publish this mapping before the end of the year.

## 2.3 Media standards convergence

The long term strategic target that I identified at the beginning of my tenure at EDItEUR is beginning to move forward.

At a technical level, the Vocabulary Mapping Framework, a JISC-funded project (<http://cdlr.strath.ac.uk/VMF/index.htm>) is worth paying attention to. This is demonstrating an interoperability mechanism for mapping between many different concepts drawn from a whole group of media metadata standards (including ONIX). The mapping itself will be published at the end of the project and will be publicly available.

Work is also beginning in a wider context, seeking collaboration between different media trade standards organisations.

Mark Bide  
London: November 2009