

Executive Director's Report to Members October 2013

Report to the members of EDItEUR – Frankfurt Book Fair

1 Overview and highlights

Another half year that can be characterised as steady (and still very busy).

- Graham Bell has been travelling incessantly, with his main focus on the wider adoption of ONIX 3.0. During the summer, he made very successful visits to both Beijing and Moscow to speak on industry platforms; ONIX training continues to be a successful way of both earning revenue and influencing the market. We need to reminding everyone of the sunset date of ONIX 2.1, which is now only just over 12 months away.
- Our agreement with BIC and Nielsen to assume responsibility for the publication and management of Thema is likely to be one of the most significant achievements of the last 6 months, although there is not yet a great deal for us to report at this stage beyond the development of software to present Thema in a convenient and multilingual [online](#) format – our first ever meeting with the Thema International Steering Committee (TISC) will have taken place in Frankfurt on the morning before the Open Meeting.
- We are currently preparing for the ICEDIS meeting in Frankfurt, which may take a decision (long-heralded) to move towards replacing the core ICEDIS fixed-format standards with more flexible XML-based equivalents. We have been preparing the ground for this over a prolonged period (with work on the structured names and addresses and on new subscription orders). Our recommendation to the committee is that they should aim for the autumn of 2015 to implement the new standards and that the sun-setting of the existing specifications should happen shortly thereafter.
- The International ISBN Agency has had a very busy summer, with both the system design/build of its new and greatly improved database and website in progress and a very well-attended AGM in New York.
- On a broader front, perhaps one of the more significant issues to note is our increasing contact with W3C, whose interest in commercial publishing is undoubtedly growing (see Section 8.1 of this report).

2 Board news

Beat Barblan (R R Bowker; Treasurer of the International ISBN Agency) is taking over the representation of the International ISBN Agency on the EDItEUR Board, replacing Julian Sowa; Ronald Schild has been elected Chair of the International ISBN Agency (the role previously held by Julian), but he will continue to represent MVB on the EDItEUR Board.

3 EDItEUR Standards development

3.1 ONIX for Books

Noah Genner of BookNet Canada will have completed his 3-year term as chair of the ONIX for Books International Steering Committee at Frankfurt this year; we are extremely grateful to him for the time he has given to the supporting ONIX over his time in the chair, and look forward to continuing to work with him.

We are currently seeking nominations for his replacement, who will be elected at the ISC meeting in Frankfurt that takes place immediately before the Open Meeting.

3.1.1 Codelists

Issue 21 of the codelists was published in April and Issue 22 in July. These focussed on providing codes for the description of Open Access monographs, and mechanisms for transmitting information about minor technical updates to e-books. Issue 23 is currently under consideration by ONIX national groups around the world. This is a small update, including:

- new codes for the description of fixed-format ebooks optimised for particular screen shapes (eg 16:9 landscape or 4:3 portrait)
- new role codes for thesis examiners
- new complexity and audience scheme identifiers
- clarification on the meaning of existing prize achievement code values in List 41

This Issue is intended for ratification at the meeting of the ONIX ISC immediately before the Open Meeting, and should be published before the end of October.

3.1.2 China and Russia

Graham Bell recently visited both Beijing and Moscow to meet with the ONIX national groups in those countries and to present at supply chain events. Trade organisations in both these countries view ONIX as a vital ingredient in making their supply chains more efficient. The use of ONIX 2.1 in the Russian book trade is well-established and widespread, and ONIX users are beginning to consider the migration to ONIX 3.0 – the Russian [Guild of Book Dealers](#) leads this initiative. In [China](#), new initiatives to make use of ONIX 3.0 are under way, including work on adopting ONIX as a Chinese national standard that began in 2010, a user interface to allow simple editing of complex book metadata from the North China University of Technology, and full documentation in Mandarin.

3.1.3 ONIX Best Practices

BISG and BookNet Canada have published a fully-updated version of their *Best Practices for Product Metadata*. This guide – required reading for North American ONIX users and useful for everyone else too – now includes information on digital products and on ONIX 3.0; it can be downloaded from [BISG](#) or [BNC](#). The advice in this document follows closely the guidance established in EDItEUR's ONIX 3.0 Implementation and Best Practice Guide, and serves greatly to reduce variations in best practices that have grown up over the years.

3.1.4 ONIX for Books training

The regular *ONIX: practical guidance and best practice* course has been run twice in the last six months as part of BIC's training programme in London, and twice more as part of in-house training for EDItEUR members. It will run again in London on November 5th and a course is planned in Oslo

before the end of the year. Graham also recently ran his first 'advanced' course on ONIX for Books as part of BIC's training programme. The course was overbooked, and will most likely be run again in the spring. Members are encouraged to contact Graham to talk about potential training opportunities in their countries.

3.1.5 ONIX for Books Acknowledgement Message

Work on the acknowledgement message (see my last report) is now at the point where Graham will be seeking pilot implementation partners at the ONIX ISC in Frankfurt.

4 Thema

EDItEUR has now signed an agreement with Nielsen and BIC under which we become responsible for the governance of Thema. This agreement is essentially in the form of the transfer of the necessary IP to EDItEUR to allow us to implement Thema on broadly the same model as *ONIX for Books* – through an International Steering Committee and National Groups. The first meeting of the EDItEUR Thema International Steering Committee (TISC) will have taken place on the morning before the EDItEUR Open Meeting in Frankfurt, and meetings will continue to take place at Frankfurt and London Book Fairs. Additional meetings are likely to be necessary, certainly in the early days of Thema; in view of the geographic spread of Thema members, these will be phone conferences.

Our active work on Thema is now beginning. Graham has been working on the technical infrastructure for the online publication of Thema. This is a significant development of a database that he developed before joining EDItEUR for the publication of BIC subject categories, with added multilingual features and support for use of the category scheme in Linked Data applications. Over the next few months, this development will also be put in place for its originally-intended purpose, the online publication of the ONIX codelists.

There is widespread interest in Thema beyond the 12 national/language groups already engaged in the development process, and we expect others to be applying for membership of the TISC at Frankfurt.

4.1 ONIX – rights and licences

4.1.1 ONIX-PL

The NISO project (funded by the Mellon Foundation) to express in ONIX-PL a set of publishers' model licences is continuing, with a little consultancy support from EDItEUR (David Martin); the primary work is being undertaken for NISO by a consultant, Selden Lamoureux. Partly in response to this project and partly to the continuing work on open access vocabularies in both NISO and JISC, the ONIX-PL pages on the EDItEUR website were updated in August with an expanded introduction and three annotated examples of ONIX-PL licence expressions created by David Martin. The examples include the Creative Commons Attribution licence (CC BY 3.0), the NISO SERU Shared Electronic Resource Understanding, and the LIBLICENSE model agreement. Each example includes a link to the licence text, a downloadable copy of the XML expression, an HTML 'summary view' and 'full view' of the expression, and explanatory notes. The examples are accessible [here](#).

4.1.2 Open Access vocabularies

Tim Devenport continues to play in active part in developments in Open Access vocabularies at both NISO and JISC (these are parallel but we hope properly co-ordinated developments). We are also working with several of members engaged in the publication of open access monographs – including one of our newest members, Knowledge Unlatched – on expressing open access terminology in ONIX for Books.

4.1.3 ONIX-RS: enhancing the message suite for rights discovery

The suite of messages comprising ONIX for Rights Information Services (ONIX-RS, <http://bit.ly/1h4Lc8Y>) has for several years successfully supported high-volume rights discovery exchanges during the ARROW project and its successor, ARROW Plus. Currently in version 1.0, the ONIX-RS messages have recently been reviewed for possible enhancements during the addition of new national partners to the ARROW consortium – bringing, for instance, requirements for the easier inclusion of transliterated text from non-Latin languages.

Working closely together with the primary group of ONIX-RS users, represented by Associazione Italiana Editori (AIE), EDItEUR is reviewing proposals for a group of enhancements that will result in an improved, version 1.1 standard. These proposals will be further discussed during the Frankfurt Book Fair, after which announcements will be made on the likely composition and timing of the new release.

4.2 ICEDIS

4.2.1 ICEDIS Meetings

As usual, there will have been an ICEDIS meeting in Frankfurt on the Monday before the Board meeting. Keith Whiter of Elsevier will be stepping down as joint-chair of the committee at the end of his term; we are very grateful to Keith for his work as joint chair of ICEDIS over the last three years. His replacement will be elected at the ICEDIS meeting.

There will also be an ICEDIS meeting in the US again this year – Tim is returning to the Charleston conference, as this has turned out to be the most satisfactory North American venue for an ICEDIS meeting that we can identify.

4.2.2 Updating ICEDIS standards for today's market and tomorrow's needs

The core ICEDIS transactional standards – most notably the Subscription Order, Renewal & Transfer message known familiarly as the "renewals" standard – have been in place for more than twenty five years and have remained largely unchanged for at least a decade. (The fact that these are still sometimes referred to as the "mag tape" format is an indication of this longevity and the importance of ICEDIS standards over that period.)

During that same period, the serials publishing supply chain has changed radically, with the dominance of online resources, the widespread introduction of bundled or package sales, and the emergence of new identifiers. There are severe limitations on the degree to which the older ICEDIS standards can be adapted to support these new requirements and the ICEDIS Meeting at UKSG in Bournemouth signalled that we need seriously to debate an eventual migration to more modern and extensible standards.

At the ICEDIS meeting in Frankfurt, EDItEUR will be proposing to the Committee that we embark on a planned migration to a new and improved set of subscriptions standards, which can better respond to current and future business needs. The new standards, some of which essentially already exist, would be developed and supported by EDItEUR, using ONIX/EDItX methodology and expressed in XML. A target date of autumn 2015 is proposed for the most business-critical switch, namely that surrounding renewals processing. After that date, existing ICEDIS fixed format standards will be deprecated and no longer actively supported.

4.2.3 ONIX for Price Catalog training workshop

In early June EDItEUR held a training and familiarization workshop on the ONIX for Price Catalog ([ONIX-PC](#)) format. The workshop (hosted by Elsevier at its UK offices) presented a comprehensive description of ONIX-PC from the viewpoints of both business decision makers and technical implementers. Early adopters Wiley Blackwell, Swets, Elsevier, LM Info and Publishing Technology were all represented, and representatives of EBSCO, Harrassowitz and Sage Publications also attended.

The workshop was, in part, put together to address various implementation questions raised at the ICEDIS Meeting at UKSG in Bournemouth earlier in the year. A timetabled series of concrete steps was agreed to pave the way for wider implementation from 2014 onward and also to harmonize some elements of good practice and interpretation that had differed between early adopters.

4.3 EDItX

EDItX implementations may not yet have reached the “big time” of widespread implementation (except perhaps here in Germany), but a steady trickle is evident in the requests for information and occasional requests for new features. At the end of July there was a minor revision of the EDItX CDF Shipment Report format to meet the requirements of a new business case identified by a UK implementer: the need to report payments, such as charitable gifts, made by consumers but not leading to any physical (or even digital) shipment.

5 Identifier standards for which EDItEUR provides management services

5.1 International ISBN Agency

The specification and build of the new website and underlying database (being undertaken by CINECA in Bologna, an organisation familiar to many members of EDItEUR) has continued through the summer.

September has also seen a very successful IIA AGM in New York. This certainly had more delegates (approaching 100) than any other in my time at EDItEUR, and was enthusiastically and generously hosted by Bowker.

5.2 International ISTC Agency/International ISNI Agency

EDItEUR's secretariat support for both these agencies continues.

6 Major projects

6.1 ARROW Plus

Our work on ARROW Plus project (primarily on the Books in Print stream) continues, specifically in trying to help formulate plans for new books in print services to establish sustainable business models.

6.2 Linked Heritage

Our work on Linked Heritage is now complete, as the project came to an end at the end of September. Our deliverables for the project have been accepted by the internal peer review process within the project, and are available [here](#). The work provides a technical basis for any commercial publishing organisation to contribute metadata in bulk to Europeana, but also cautions that because of Europeana's policy on redistribution of that metadata to third parties, there are good reasons why commercial organisations may not wish to do so.

6.3 DCH-RP

Tim Devonport's work on [DCH-RP](#) continues. This is of particular interest to EDItEUR member publishers with a strong base in the humanities or to organizations actively engaged in preservation activities or as national memory institutions. The project seeks to establish guidelines and a shared direction that can support preservation strategies in museums, galleries, libraries and other heritage institutions across the European Union. EDItEUR is acting as a bridge between the project and the publishing world. As well as encouraging dialogue, we are investigating factors that would encourage partnerships between those responsible for digital cultural holdings and publishers commercially active in related areas.

6.4 Enabling Technologies Framework

At the beginning of the summer, we completed our third (and final) year of work on this project for WIPO; we are currently working on some additional tasks which will take us up to the end of the year, but it is currently uncertain what our role will be in 2014. I expect to be able to report back to members on this before the end of the year.

7 Personnel

Michael Hopwood, whom many of you will have got to know during his work on the Linked Heritage project has left EDItEUR now that the project is complete; I am delighted to report that he is now moving with his family to Frankfurt where he will be working for MVB so remaining within the community of which he has become part over the last 2 years. We wish him well in this exciting new phase of his life.

8 Beyond EDItEUR

8.1 W3C

The World Wide Web Consortium held a two-day '*Publishing and the Open Web Platform*' workshop in Paris on 16th/17th September. This followed a broadly similar event in New York last year (of

which MB attended part); the New York event was promoted jointly with the IDPF and BISG. GB attended the Paris event on behalf of EDItEUR.

This event, which took the form of an 'industry consultation', posed questions about whether the elements of the 'open web platform' – essentially HTML, CSS and JavaScript – were fit for use for both production and delivery within the commercial book, journal, newspaper and magazine supply chains.

The W3C is the body responsible for key standards that glue the World Wide Web together, but the use of web technologies does not of itself imply 'publishing on the web' – the EPUB 3 ebook standard is based very closely on the W3C's key web standards.

Like EDItEUR, the W3C strives to develop interoperable, free-to-use standards with global applicability. However, there is very little input to those standards from publishers or most others in the ebook supply chain – W3C is dominated by the large technology companies. In an effort to address this, the W3C has set up a [Digital Publishing Interest Group](#), to act as an expert technical forum to help make the requirements of the publishing industry clearer. Full participation in the Interest Group is dependent on W3C membership, but much of the activity is public.

The Paris workshop focused on what additions are needed in CSS to support improved pagination, better page layout, and publishing workflows – all critical to the production of ebooks. Future events will focus on the specific needs of educational publishing. Other areas of concern are the structural semantics of book products (where the EPUB standard was forced to invent its own vocabulary), and the need for software tools capable of addressing the scale and complexity of commercial book publishing. The interest group will then feed these requirements back to the standard-setting parts of W3C during 2014.

It has been made clear that W3C welcomes input from EDItEUR (on behalf of its members) and we are planning a one-day EDItEUR/W3C meeting before the end of the year.

8.2 EPUB 3/the IDPF

Progress towards ISO standardisation of EPUB 3 (as a technical specification) continues without any obvious potential barriers to its successful conclusion. This is important from the point of view of adoption in some key sectors (particularly government publications). Concerted efforts are continuing to push forward the wider implementation of EPUB 3 in its conventional (trade publishing) sectors, although progress is still slower than might be hoped – perhaps because EPUB 2 is “good enough” in many circumstances (a similar challenge to the one we have experienced with the move to ONIX 3.0). The AAP has a major effort in place to encourage EPUB 3 implementation, not least in the context of the mainstreaming of accessibility features (core to the role of the ETF project); Ed McCoyd of the AAP is speaking about this initiative in the EDItEUR stream at the CONTEC conference on 8th October.

However, there is also considerable interest in adoption of EPUB 3 in “new” sectors, those where EPUB 2 was never a contender; for example, a workshop on adoption of EPUB 3 for educational content being held in Boston in late October (hosted by Pearson: jointly sponsored by IDPF, W3C, IMS Global) is heavily oversubscribed <http://idpf.org/edupub-2013>; Graham will be attending on behalf of EDItEUR.

It is worth noting that Adobe has joined the Radium Foundation <http://readium.org/news/adobe-joins-readium-foundation>; we will watch with interest for developments on the DRM front.

8.3 Linked Content Coalition

The Linked Content Coalition is in the process of forming as a group of media standards organisations. EDItEUR is one of the 6 organisations that are taking a lead in this process (alongside the IDF, MovieLabs, IPTC, NISO, PLUS); this group has agreed in principle to establish LCC as a UK company limited by guarantee (a low-cost option both in terms of establishment costs and continuing regulatory running costs). A number of other standards organisations have been invited to join, and I would anticipate that at launch it should have a membership of at least 8 organisations and that all major sectors of the media will be represented.

8.4 The UK "Copyright Hub"

By the time the Board meets, the report of the Data Building Blocks Committee (DBBC – which I chaired) will have been published, alongside the reports of all the other committees which have formed part of the UK's Copyright Licensing Steering Group (CLSG). This is the committee which has been overseeing the delivery of all of the recommendation of the Hooper/Lynch report, *Copyright Works* (including the copyright hub). The CLSG report is being presented to the UK Government on 25 September.

The [Copyright Hub](#) itself – currently a very simple concept – has been launched; and industry support for its continuation now seems assured. Significant technical support is promised from the [Connected Digital Economy Catapult](#), a UK-government funded initiative. There is real recognition of the importance of the widespread implementation of identification and metadata standards to the success of this initiative, and no doubt EDItEUR will wish to continue to play a part. We are currently in conversation with the copyright hub about the relationship with the Linked Content Coalition and how that will work alongside the DBBC in future.

MB – 1 October 2013

Regular EDItEUR Meetings

Don't forget that there are regular meetings at both the London and Frankfurt Book Fairs at which EDItEUR members others are very welcome – we hope to see you next week at the meetings which are appropriate to your interests:

- **ONIX for Books International Steering Committee:** participation through national groups, observers by arrangement
- **Thema International Steering Committee:** participation through national groups, observers by arrangement
- **ICEDIS** (note also at UKSG and the Charleston conference): open to all members with an interest in serials
- **Members Open Meeting:** open to all members, non-members observers by arrangement

If you need more information, email info@editeur.org