Transitioning from ONIX 2.1 to 3.0

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BISG webinar, 5th May 2020
About me

- 20+ years experience at the point where book publishing and technology meet
- formerly senior manager in IT department for HarperCollins UK
  - led development of bibliographic, editorial and digital asset management systems
  - involved in e-book, e-audio, print-on-demand and online projects
- joined EDItEUR in mid-2010, primarily to guide ONIX development, now responsible for overall development of EDItEUR’s range of standards for the book, e-book and serials supply chains
About EDItEUR

● a not-for-profit membership organisation
● develops, supports and promotes metadata and identification standards for the global book, e-book and serials supply chains
● acknowledged centre of expertise on standards and metadata for the industry
● based in London, but a global membership of publishers, distributors, wholesalers, retailers, subscription agents, libraries, system vendors, rights organizations and trade associations
About EDItEUR

- also provides management services to ISNI International Agency and International DOI Foundation
  - Executive Director of International ISNI Agency is a member of EDItEUR staff
- EDItEUR has two full-time staff, 1.5 FTE part-time staff, plus access to world-class consultants in both book and serials sectors
- works closely with other standards bodies, to ensure its standards meet the needs of their stakeholders too
- member participation is vital, to ensure that standards keep pace with evolving business requirements
EDITEUR family of standards

- **ONIX** – descriptive metadata
  - ONIX for Books
  - ONIX for Subscription Products (Serials)
  - targeted ONIX messages *eg* for content licencing, RRO use

- **Thema** – subject classification

- **EDIX** – e-commerce messages
  - EDIX Inventory and Sales Reporting
  - EDIX Stock enquiries, Trade orders, Invoices *etc*

- older EDIFACT and ICEDIS EDI messaging
СССР — Ударная бригада пролетариата всего мира
The story so far

- 2000 – ONIX 1.0
- 2001 – ONIX 2.0
- 2003 – ONIX 2.1
  - 2006 – revision 03 (latest update intended for global use)
  - still in use, but now considered a ‘legacy format’
- 2009/10 – initial release of ONIX 3.0
  - seven updates so far, adding functionality with full backwards compatibility
- sunset of EDItEUR support for ONIX 2.1 at end of 2014
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Why was ONIX 3.0 developed?

- increasing demand to deliver more sophisticated marketing collateral
- increasing internationalisation of the book trade
- rapid growth in importance of digital products
- wish to ‘avoid data bloat’ (in reality, a need to reduce the processing overhead of frequent metadata updates)
- to rationalise the accumulation of Band Aid fixes
- to simplify future development – more regular, more modular design
  - such as addition of new pricing models (added 3.0.3) or promotional events (added 3.0.7)
ONIX 2.1 vs ONIX 3.0

- two quite different messages (though about 60% commonality)
  - block-level updates
  - digital products
  - sets and series
  - sales rights
  - marketing collateral
  - promotional events (new in 3.0.7)
  - related works
  - parallel multi-lingual data
  - international markets
  - flexibility in business model and pricing
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  - related works
  - parallel multi-lingual data
  - international markets
  - flexibility in business model and pricing
  - 7–10 years accumulated experience
  - global best practice guide
  - reply message
  - extended XML schema support
  - simpler, more logical structure
Starting from the right place

- using a commercial off-the-shelf solution?
  - talk to your vendor – almost all are 3.0-ready

- is your current ONIX 2.1 up to date?
  - and not simply ‘2.0 in disguise’
    - avoid use of dedicated tags like `<EAN13>` or `<BASICMainSubject>`
    - maximise use of generic composites (e.g., `<ProductIdentifier>`, `<MainSubject>`)  
    - eliminate deprecated or problematic 2.1 tags (e.g., `<AvailabilityCode>`) and codes
    - if possible, use XHTML for rich text markup (avoiding use of `CDATA` or `&lt;`)
    - if possible, ensure ability to output data in Unicode

- talk to your supply chain partners
2.1 to 3.0 – different types of change

- syntax updates
- spring cleaning
- simple refactoring
- new requirements
- more challenging structural changes
- but these changes come with opportunities for delivering richer data

- and note you can continue to produce ONIX 2.1 from the same data – this isn’t an either/or choice
Syntax updates

- in line with broader XML developments
- no `<!DOCTYPE>`
- no named character entities like `&hellip;` or `&ouml;`
  - use native characters wherever possible, *ie* use `...` and ö
  - or if that isn’t possible numerical character references, *ie* `&#x2026;` and `&#xf6;`
- strong recommendation to use Unicode instead of the Windows character set
- strong recommendation to use XSD schema rather than DTD for validation – it does a more thorough job
- and use XSD 1.1 wherever possible (it’s required for the ‘strict’ schema)
Spring cleaning

- getting rid of deprecated or otherwise problematic tags and codes
- some simple renaming or re-ordering of tags for consistency
- some existing tags use different code lists
<EAN13>9780007232833</EAN13>
<EAN13>9780007232833</EAN13>
<ProductIdentifier>
  <ProductIDType>01</ProductIDType>
  <IDTypeName>HCP PID</IDTypeName>
  <IDValue>32032-4</IDValue>
</ProductIdentifier>
<ProductIdentifier>
  <ProductIDType>03</ProductIDType>
  <IDValue>9780007232833</IDValue>
</ProductIdentifier>

<ProductIdentifier>
  <ProductIDType>15</ProductIDType>
  <IDValue>9780007232833</IDValue>
</ProductIdentifier>

<ProductIdentifier>
  <ProductIDType>01</ProductIDType>
  <IDTypeName>HCP PID</IDTypeName>
  <IDValue>32032-4</IDValue>
</ProductIdentifier>
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  <AudienceCodeType>01</AudienceCodeType>
  <AudienceCodeValue>03</AudienceCodeValue>
</Audience>
<AvailabilityCode>IP</AvailabilityCode>
<PublishingStatus>04</PublishingStatus>
...
<ProductAvailability>20</ProductAvailability>
<Contributor>
  <SequenceNumber>1</SequenceNumber>
  <ContributorRole>A01</ContributorRole>
  <PersonName>Maj Sjouml;wall</PersonName>
  <PersonNameIdentifier>
    <PersonNameIDType>01</PersonNameIDType>
    <IDTypeName>HCP Author ID</IDTypeName>
    <IDValue>7421</IDValue>
  </PersonNameIdentifier>
  <BiographicalNote textformat="05">Maj Sjouml;wall was a poet and translator. She lived in Sweden.</BiographicalNote>
</Contributor>
<Contributor>
  <SequenceNumber>1</SequenceNumber>
  <ContributorRole>A01</ContributorRole>
  <NameIdentifier>
    <NameIDType>01</NameIDType>
    <IDTypeName>HCP Author ID</IDTypeName>
    <IDValue>7421</IDValue>
  </NameIdentifier>
  <PersonName>Maj Sjöwall</PersonName>
  <BiographicalNote textformat="05">Maj Sjöwall was a poet and translator. She lived in Sweden.</BiographicalNote>
</Contributor>
Umberto Eco, professor of semiotics at the University of Bologna, and author of
<cite>The Name Of The Rose</cite> and <cite>Foucault’s Pendulum</cite>, is one of the world’s bestselling novelists.

Umberto Eco, professore di semiotica all’Università di Bologna e autore di
<cite>Il nome della rosa</cite> e <cite>Il pendolo di Foucault</cite>, è uno dei romanziere più venduto al mondo.
<ProductForm>DG</ProductForm>
<ProductFormDetail>E201</ProductFormDetail>
<EpubType>029</EpubType>
<ProductForm>ED</ProductForm>

<ProductFormDetail>E101</ProductFormDetail>

<ProductFormDetail>E201</ProductFormDetail>
Simple refactoring

- changing the tags and structure used to express the data
  - to make the meaning clearer and remove any ambiguities
  - to make the ONIX more expressive
  - to make further development simpler in the future
<PublishingDate>
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  <Date dateformat="05">1811</Date>
</PublishingDate>

<PublishingDate>
  <PublishingDateRole>19</PublishingDateRole>
  <Date dateformat="01">198510</Date>
</PublishingDate>

<PublishingDate>
  <PublishingDateRole>01</PublishingDateRole>
  <Date>20110428</Date>
</PublishingDate>

<PublishingDate>
  <PublishingDateRole>02</PublishingDateRole>
  <Date>20110428</Date>
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  <ContentAudience>00</ContentAudience>
  <ResourceMode>03</ResourceMode>
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      <FeatureValue>D502</FeatureValue>
    </ResourceVersionFeature>
    <ResourceVersionFeature>
      <ResourceVersionFeatureType>03</ResourceVersionFeatureType>
      <FeatureValue>150</FeatureValue>
    </ResourceVersionFeature>
  </ResourceVersion>
  <ResourceLink>http://images.harpercollins.co.uk/036036-fc150.jpg</ResourceLink>
  <ContentDate>
    <ContentDateRole>17</ContentDateRole>
    <Date dateformat="00">20060412</Date>
  </ContentDate>
</SupportingResource>
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</SalesRights>
<SalesRights>
  <SalesRightsType>01</SalesRightsType>
  <RightsCountry>CA US</RightsCountry>
</SalesRights>

<SalesRights>
  <SalesRightsType>03</SalesRightsType>
  <RightsCountry>GB IE AU NZ</RightsCountry>
</SalesRights>
<SalesRights>
  <RightsCountry> * 
  <RightsTerritory> * 
  <RightsRegion> (deprecated) 
</SalesRights>

<NotForSale>
  <RightsCountry> * 
  <RightsTerritory> * 
</NotForSale>
<SalesRights>
  <RightsCountry> *</RightsCountry>
  <RightsTerritory> *</RightsTerritory>
  <RightsRegion> (deprecated)</RightsRegion>
<NotForSale>
  <RightsCountry> *</RightsCountry>
  <RightsTerritory> *</RightsTerritory>
</Price>
  <CountryCode> *<CountryCode>
  <Territory> *</Territory>
  <CountryExcluded> *</CountryExcluded>
  <TerritoryExcluded> *</TerritoryExcluded>
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  <SupplyToTerritory> *</SupplyToTerritory>
  <SupplyToRegion> (deprecated)</SupplyToRegion>
  <SupplyToCountryExcluded> *</SupplyToCountryExcluded>
<MarketRepresentation>
  <MarketCountry> *</MarketCountry>
  <MarketTerritory> *</MarketTerritory>
  <MarketCountryExcluded> *</MarketCountryExcluded>
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    <Territory>
        <CountriesIncluded> *
        <RegionsIncluded> *
        <CountriesExcluded> *
        <RegionsExcluded> *
    </Territory>
</SalesRights>
<SalesRights>
  <SalesRightsType>01</SalesRightsType>
  <Territory>
    <CountriesIncluded>US CA MX</CountriesIncluded>
  </Territory>
</SalesRights>

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  <SalesRightsType>06</SalesRightsType>
  <Territory>
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    <CountriesIncluded>US CA MX</CountriesIncluded>
  </Territory>
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  </Territory>
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<SalesRights>
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      </SalesOutletIdentifier>
      <SalesOutletName>Indigo</SalesOutletName>
    </SalesOutlet>
  </SalesRestriction>
</SalesRights>
New requirements

• **sales rights**
  
  - must be comprehensive, including details of where the product is not for sale as well as the places where it is for sale

• **multi-component and multi-item products**
  
  - multipacks, boxed sets *etc* (<ProductForm> = S* or some X*) *must* include <ProductPart> to describe their various parts
Major structural changes

- how titles, series and sets are expressed
- how markets and suppliers are expressed
  - each *seems* complicated, but the changed is intended to match the way books are named or distributed in the real world
<Title>
  <TitleType>01</TitleType>
  <TitleText textcase="01">The lion, the witch and the wardrobe</TitleText>
  <TitlePrefix textcase="01">The</TitlePrefix>
  <TitleWithoutPrefix textcase="01">lion, the witch and the wardrobe</TitleWithoutPrefix>
</Title>
<Series>
  <Title>
    <TitleType>01</TitleType>
    <TitleText textcase="o1">The chronicles of Narnia</TitleText>
  </Title>
</Series>

<Title>
  <TitleType>01</TitleType>
  <TitleText textcase="o1">The lion, the witch and the wardrobe</TitleText>
  <TitlePrefix textcase="o1">The</TitlePrefix>
  <TitleWithoutPrefix textcase="o1">lion, the witch and the wardrobe</TitleWithoutPrefix>
</Title>
<Series>
  <Title>
    <TitleType>01</TitleType>
    <TitleText textcase="01">The chronicles of Narnia</TitleText>
  </Title>
</Series>

<Title>
  <TitleType>01</TitleType>

  <TitlePrefix textcase="01">The</TitlePrefix>
  <TitleWithoutPrefix textcase="01">lion, the witch and the wardrobe</TitleWithoutPrefix>
</Title>
<Series><Title><TitleType>01</TitleType><TitleText textcase="01">The chronicles of Narnia</TitleText></Title></Series><Title><TitleType>01</TitleType><TitlePrefix textcase="01">The</TitlePrefix><TitleWithoutPrefix textcase="01">lion, the witch and the wardrobe</TitleWithoutPrefix></Title>
The chronicles of Narnia

The lion, the witch and the wardrobe
<Series>
  <Title>
    <TitleType>01</TitleType>
    <TitleText textcase="01">The chronicles of Narnia</TitleText>
  </Title>
</Series>

<Title>
  <TitleType>01</TitleType>
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  </TitleElement>
</Title>
<Title>
  <TitleType>01</TitleType>
  <TitleElement>
    <TitleElementLevel>01</TitleElementLevel>
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  </TitleElement>
</Title>
<Collection>
  <Title>
    <TitleType>01</TitleType>
    <TitleElement>
      <TitleElementLevel>02</TitleElementLevel>
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      <TitleWithoutPrefix textcase="01">Chronicles of Narnia</TitleWithoutPrefix>
    </TitleElement>
  </Title>
</Collection>
<Collection>
  <Title>
    <TitleType>01</TitleType>
    <TitleElement>
      <TitleElementLevel>02</TitleElementLevel>
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    </TitleElement>
  </Title>
</Collection>

>Title
  <TitleType>01</TitleType>
  <TitleElement>
    <TitleElementLevel>01</TitleElementLevel>
    <TitlePrefix textcase="01">The</TitlePrefix>
    <TitleWithoutPrefix textcase="01">chronicles of Narnia</TitleWithoutPrefix>
  </TitleElement>
</Title>
<Title>
  <TitleType>01</TitleType>
  <TitleElement>
    <TitleElementLevel>01</TitleElementLevel>
    <TitlePrefix textcase="01">The</TitlePrefix>
    <TitleWithoutPrefix textcase="01">lion, the witch and the wardrobe</TitleWithoutPrefix>
  </TitleElement>
</Title>
<Title>
   <TitleType>01</TitleType>
</Title>

>TitleElement>
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   <TitlePrefix textcase="01">The</TitlePrefix>
   <TitleWithoutPrefix textcase="01">lion, the witch and the wardrobe</TitleWithoutPrefix>
</TitleElement>
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<Title>
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  <TitleElement>
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  </TitleElementLevel>
</TitleElement>
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  <TitlePrefix textcase="01">The</TitlePrefix>
  <TitleWithoutPrefix textcase="01">lion, the witch and the wardrobe</TitleWithoutPrefix>
</TitleElement>
</Title>
<Title>
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    <TitlePrefix textcase="01">The</TitlePrefix>
    <TitleWithoutPrefix textcase="01">chronicles of Narnia</TitleWithoutPrefix>
  </TitleElementLevel>
</TitleElement>

<TitleElement>
  <TitleElementLevel>01</TitleElementLevel>
  <TitlePrefix textcase="01">The</TitlePrefix>
  <TitleWithoutPrefix textcase="01">lion, the witch and the wardrobe</TitleWithoutPrefix>
</TitleElement>

</Title>
two ways to provide collection details in ONIX 3.0

1. as just another title element within `<TitleDetail>`, or
2. as a title element inside `<TitleDetail>` within `<Collection>`

not always a simple choice

depends on whether collection title is an integral part of the identity of the product, or whether the product has an identity separate from the collection
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Sales rights, markets and distribution

- **publishing rights** – where the publisher can publish and sell
  - *not necessarily* directly expressed in ONIX – but *can be* communicated using sales rights types 04, 05 and 06 instead of 03

- **sales rights** – where the publisher aims to *exploit* its publishing rights
  - directly expressed in `<SalesRights>`
  - ONIX 3.0 demands comprehensive sales rights, including territories where the product is *not* for sale and those where the rights are *unknown*

- **distribution rights** – subset of sales rights conferred on the distributor, a wholesaler and ultimately the retailer
author’s copyright → publisher’s publishing rights → distributor’s distribution rights → wholesaler and retailer rights
product is not for sale in other territory

author’s copyright

publisher’s publishing rights

another publisher’s publishing rights in a different territory

distributor’s distribution rights

wholesaler and retailer rights
product is not for sale in other territory <ProductSupply>

author’s copyright

publisher’s publishing rights

another publisher’s publishing rights in a different territory

distributor’s distribution rights

another distributor’s distribution rights in a different market

wholesaler and retailer rights

two repeats of
author’s copyright

product is not for sale in other territory
distributor’s distribution rights
another distributor’s distribution rights in a different market
wholesaler and retailer rights
another wholesaler
Markets and suppliers

- ONIX 2.1 describes suppliers and the market territories they operate in
  - `<SupplyDetail>` describes one supplier
  - `within <SupplyDetail>`, `<SupplyToCountry>` describes the geographical extent of the supplier’s market

- ONIX 3.0 describes markets and the suppliers that operate there
  - each repeat of `<ProductSupply>` describes one market, including `<Market>` `<Territory>` for the geographical extent
    - in the simplest case, one single market, you can omit `<Market>` `<Territory>` because it is the same as the `<SalesRights>`
  - `within one market`, multiple `<SupplyDetail>` composites, for each of that market’s suppliers
Markets and suppliers

- ONIX 2.1 describes suppliers and the market territories they operate in
  - <SupplyDetail>
  - within <Market>

- ONIX 3.0 describes markets and the suppliers that operate there
  - <ProductSupply>

- each repeats
  - <Market>

- in the simplest case, one single <Market> you can omit <Territory> because it is the same as the <SalesRights>

- within one market, multiple <SupplyDetail> composites, for each of that market’s suppliers

- slightly confusing because of <Market> and <Supplier>
  - <Market> specifies the *geographical extent* of the market described by <ProductSupply>
  - <Supplier> *names a supplier* inside <SupplyDetail>, which also encapsulates the prices that supplier charges (these too should be linked to a specific geographical area – don’t rely on currency implying country)
Markets

- defined by the geography of distribution arrangements
- by market-specific ‘publishing’ dates and status
- and occasionally, by sales representation
- contrast...
  - a single distributor for global supply – one market
  - early publication in Australia – two markets (even if same distributor)
  - three exclusive distributors, for USA, for Canada, and a third for everywhere else – three markets
<!-- Sales rights = US CA -->

<ProductSupply> <!-- US market -->
  <!-- Territory = US -->
  <!-- Dates and status for US -->
  <!-- Suppliers and prices for US -->
</ProductSupply>

<ProductSupply> <!-- CA market -->
  <!-- Territory = CA -->
  <!-- Dates and status for CA -->
  <!-- Suppliers and prices for CA -->
</ProductSupply>
<ProductSupply>

- <SalesRights> gives publisher’s view of where the product should be available for sale
- any one <ProductSupply> can give (incomplete) information about one market – one part of the area where sales rights are positive
- where explicit market-specific info is missing, look ‘up’ to the global dates, statuses
- in principle, all <ProductSupply> composites ‘add up to’ the total <SalesRights>

<!-- Sales rights = US CA -->

<!-- Territory -->

<!-- Dates -->

<!-- Suppliers and prices for CA -->

</ProductSupply>
Use this as an opportunity to reassess...

- does the data you distribute, or the data you receive, meet your business requirements?
  - what do you need to add, but also what can you subtract from your ONIX?
  - what *could* you add that would provide a sales benefit?

- reduce the ‘flavours’ of ONIX you deal with
  - does everything you send align with the standard? Are your files valid according to the strict schema?
  - does everything you send align with best practices published by EDItEUR, BISG, BNC and BIC?
  - speak to your supply chain partners and critically re-examine every so-called ‘requirement’ that deviates from the standard and these best practices
...and to add new functionality

- e-book DRM, usage constraints and accessibility information
- open access and IP licensing, funding details
- nested multi-level series and sets
- multiple publisher and imprint identifiers
- multiple work relationships
- market availability date (‘local pub date’)
...and to add new functionality

- richer collateral material
  - can be geographically targeted
  - with from ... until dates
  - hashes to validate downloads
  - table of contents, index, promotional headline (if you don’t already use them)
  - schema.org SEO snippets

- promotional events – *which can include online events*
  - author interviews and readings
...and add new functionality

- prizes for contributors (as well as for books)
- multiple, detailed author-place relationships
- identifiers for personal and corporate contributors (*e.g.* ISNI)
- metadata can be multi-lingual
- acknowledgement message (if you’re not already using it)
...and to add new functionality

- multiple ‘supplier own coding’
- supplier stock, proximity and velocity
- differing availability per supplier
- price conditions and price constraints, rentals
- coded pricing (Apple-style price tiers)
- future prices (if you don’t already use them in 2.1)
- more flexibility with free-of-charge products
Why update?

- Rich metadata is more critical than ever in encouraging sales
- Numerous improvements in the message
  - Particularly for e-books, international trade, block level updates
- Loss of EDItEUR support for 2.1 from end of 2014
  - Better tools available for 3.0, and ongoing development
- Risk of not upgrading (eg of major customer giving little notice of requiring 3.0)
  - Amazon has announced its December 2020 deadline for all ONIX feeds – globally – for all physical product data. Deadlines for digital products are expected to follow soon after. Realistically, Dec 2020 means September 2020
● EDItEUR ONIX 3.0 *Specification*, global *Implementation and Best Practice Guide*, and various XML tools

● EDItEUR ONIX 2.1 *Specification* and tools are still available
  ● important notes on using 2.1 after sunset
  ● [https://www.editeur.org/15/Archived-Previous-Releases/](https://www.editeur.org/15/Archived-Previous-Releases/)

● codelists are a vital part of the framework
  ● [https://www.editeur.org/14/Code-Lists#code lists](https://www.editeur.org/14/Code-Lists#code lists)
  ● [https://ns.editeur.org/onix](https://ns.editeur.org/onix) (interactive)

● technical support mailing list
  ● [https://groups.io/g/onix](https://groups.io/g/onix) (subscribe via blank e-mail to onix+subscribe@groups.io)

● EDItEUR general enquiries [info@editeur.org](mailto:info@editeur.org)
• EDItEUR application notes
  • https://www.editeur.org/files/ONIX 3/APPNOTE Sales rights in ONIX.pdf
  • https://www.editeur.org/files/ONIX 3/APPNOTE Dimensions and weights in ONIX.pdf
  • https://www.editeur.org/files/ONIX 3/APPNOTE Block updates in ONIX.pdf
  • https://www.editeur.org/files/ONIX 3/APPNOTE Did you know.pdf
BISG and BookNet Canada ONIX best practices

BIC/Nielsen UK ONIX best practices
- https://www.nielsenbookdata.co.uk/uploads/BookData ONIX Guidelines V3_2.pdf (ONIX 2.1, apparently no longer available but contact qa.book@nielsen.com)
- https://www.bic.org.uk/files/pdfs/111114 BIC UK ONIX 3 guidelines revision 1 final.pdf (ONIX 3.0)

BookNet Canada migration blog and webinar
- https://www.booknetcanada.ca/blog/2015/9/22/onix-21-to-30-transition-markets-and-supply (four-part blog post)
- https://booknetcanada.wistia.com/medias/1nrl6owlh3 (previous recorded webinar)
- **Thema subject scheme 1.3**
  - [https://www.editeur.org/151/thema](https://www.editeur.org/151/thema) (all resources)
  - [https://ns.editeur.org/thema](https://ns.editeur.org/thema) (interactive browser)
  - [https://groups.io/g/thema](https://groups.io/g/thema) (subscribe via blank e-mail to thema+subscribe@groups.io)

- **BISAC Subject codes 2019**
  - [https://bisg.org/page/BISACEdition](https://bisg.org/page/BISACEdition) (note annual licensing requirement for BISG non-members)

- **BIC Subject codes 2.1**
  - [https://ns.editeur.org/bic_categories](https://ns.editeur.org/bic_categories) (interactive)

- **ISNI International Agency**
  - [http://isni.org](http://isni.org)