

Thema International Steering Committee Minutes

*Wednesday 14th October 2015, 10:00-12:00 CEST (UTC+2),
Room Brillanz, Hall 4.2, Frankfurt Messe*

Attendees:

Luc Audrain (Hachette Livre)	Mark Kuyper (BISG)
Detlef Bauer (Libri GmbH)	Karina Luke (BIC)
Graham Bell (EDItEUR)	Merve Okçuoğlu (Turkish Publishers Association)
Maria Börman (Bokinfo)	Bruno Pacheco (observer – APEL)
Francesca Cacciapaglia (Informazioni Editoriali)	Pat Payton (Bowker)
Michel Cervellin (BTLF)	Jesús Peraita (FGEE/DILVE)
Virginie Clayssen (EDITIS)	Lisbeth Hankansson Petré (Bokinfo)
Laurent Dervieu (ELECTRE)	Simonetta Pillon (Informazioni Editoriali)
Emad Eldeen Elakehal (observer – ibiidi.com)	Marie Bilde Rasmussen (for Danish PA)
Fride Fosseng (Bokbasen AS)	Chris Saynor (GiantChair)
Alain Fournier (BTLF)	Howard Willows (Nielsen Book, Chair)
Bente Franck-Sætervoll (Bokbasen AS)	Jon Windus (Nielsen Book)
Noah Genner (BookNet Canada)	Sarah Wang (Wang Xia) (RDG)
Alex Ingram (EDItEUR)	Tina Yang (Hang Xia) (RDG)
Tang Jiajun (TC505)	An Xiumin (TC505)

1. Welcome and introductions

Howard Willows welcomed delegates to the 5th meeting of the *Thema* International Steering Committee (TISC) and invited attendees to introduce themselves.

2. Minutes of ISC Meeting held 15th April, London Book Fair, and matters arising

HW noted the reference to and differences between the Thema_implementation mailing list, and the private Google Group. The Thema_implementation¹ list itself hasn't seen the level of usage hoped for as yet, but is there for discussions around implementation of the agreed and published *Thema* standard. In contrast the Google group Thema_ISC² is an online version of the ISC, run as a private group open to those who can or do attend the ISC meetings in person.

HW said that Len Vlahos's minuted comments on BISAC were now slightly outdated, but Mark Kuyper confirms the BISAC scheme will make their proposed update with a distinct tree for YA (young adult) codes as well as existing juvenile codes in January. The YA tree will have basically the same structure as the juvenile tree. Pat Payton noted that support in the BISAC to *Thema* mapping would follow at a later date.

¹ https://groups.yahoo.com/neo/groups/thema_implementation/info

² <https://groups.google.com/forum/#!forum/thema-isc>

3. Summary of activities since last meeting

Alex Ingram took the committee through an update of progress with *Thema* in the past six months, referring to the activity report he had provided in conjunction with HW. *Thema* is now in 11 languages – Arabic, Danish, German, Spanish, French, Italian, Japanese, Norwegian, Polish, Russian and Swedish. Not all of these are at the same position, but translations continue to develop, and further translations are in progress for Chinese, Greek and Turkish.

There have been a number of improvements to the *Thema* online browser³.

The browser now provides the following extra functionality:

- Searches for codes in addition to searches for heading text
- Where See also-style cross references against a heading referred to another code these now show the heading for that code as well, and the codes and headings listed within the cross references are now active hyperlinks
- An improved case-independent search has been implemented so that the accented characters are also case independent (and in expectation of a Turkish translation, case independence has been developed for Turkish text too, where an upper case i is İ with a dot, not I)

HW reminded the group to ensure that they share any work on improving translations with EDItEUR. AI said that although it may not be obvious, EDItEUR is regularly updating the data behind the browser and so welcomes further updates.

GB noted that with the case- and accent-independence it may well be possible to support accent variations in translations, to support requirements for dialects.

AI took the group through the process and discussions inside the UK group around the idea of a mission statement, which was currently as follows:

“Thema is a subject category scheme designed to meet the needs of publishers, retailers and trade intermediaries in all sectors of the global book publishing business, by enabling the direct communication of accurate subject information and enhancing the discoverability and sales of products across multiple markets.”

Jesús Peraita felt there was an important international aspect to grasp in the mission statement. *Thema* is not an anonymous organisation, but a scheme with active participation from many countries, which is owned and developed by its users (through the national groups, the TISC and EDItEUR) HW took the point and agreed to note it along with the need to talk of *Thema* as an ongoing process as well as a classification scheme.

Karina Luke queried whether the statement should state or even imply that using *Thema* would directly increase sales. Bente Franck-Sætervoll understood KL’s concern but said on the other hand the statement was intended to be promotional so a reference to sales (without overstatement) would be useful, and perhaps using a phrasing like “and thereby sales” could link better. BFS was keen to retain a reference to sales whereas KL suggested that restricting the statement to discoverability might be more appropriate. Jon Windus said it was important to think about the aim to increase sales and that was a clear goal for the scheme. HW summed up by saying he felt that the need to keep sales in the wording was crucial, and referring to greater

³ <http://editeur.dyndns.org/thema>

sales as an *aim* of the scheme was legitimate. Laurent Dervieu was keen to pick up on some of the unique multi-national nature of *Thema*; GB agreed some of that needed to be captured. The ISC Google group will be used to discuss a further draft and to then take the discussion forward.

ACTION: GB agreed that EDItEUR would invite all attendees of this ISC meeting to the *Thema* ISC email group if they were not already members.

AI quickly took the ISC through some issues that had come up in recent *Thema* work by HW and GB about the order of codes. Fuller details are in the activity report, but the key point is that HW felt that alternative code sorting orders may be useful in creating and documenting mappings. GB admitted this was a fine technical distinction, but AI invited opinions from the group. HW emphasised that it was in particular with regard to Time Period Qualifiers and national extensions that the current default sorting order seemed least intuitive and useful, where an extension under a broad time period, such as 3M would be listed after all shared codes beginning 3M*, and could thus be greatly removed from its parent code and jarringly out of chronological order. Put simply, the issue is whether the punctuation and country code that mark the beginning of a national extension should be regarded as a letter coming ‘after Z’ (as current) or ‘before A’ (as HW proposed for the mapping). Both were valid options. JP noted that there may be particular issues beyond time periods, perhaps in subjects like law with the order of codes needing to be varied for particular national requirements. HW noted that groups could distribute their translations with a particular suggested order as a further column as JP suggested, to handle such issues. Although HW said varying orders would not be possible on the browser at present, GB agreed he could have a look at a potential method for handling this on the browser.

Sarah Wang shared some information about the progress of the Chinese translation of *Thema*. They are needing to consider both simplified and traditional Chinese in their translation work. SW was concerned about how to handle the translation requirements in China – both for those publishers with experience and existing titles along with those new publishers in a growing market. HW replied that each country in adopting, encouraging and promoting *Thema* has had to find their own way. Some codes may need to be assigned manually, but it is plausible that (for backlog) many will be mapped from existing classifications (*eg* the Chinese Library classification).

SW was keen to further understand how tools and practices can be adopted that encourage publishers in China to adopt *Thema*. HW was concerned about how much of that could be covered in this meeting in detail. GB said it was important to learn from a few key aspects – the online browser for *Thema*, which is an interactive way of approaching the hierarchy, where the Chinese translation should be available. Further understanding of the process can be taken from the experience of mapping from existing schemes such as BIC to *Thema* or those for BISAC, CLIL and WGS. That BISAC mapping is also available in automated form from BookNet Canada where you can input ISBN and BISAC code and receive ISBN and *Thema* code. GB said there was no single answer, but there are a series of experiences in handling such introductions.

PP queried the issue of variants of the same language in translating headings. GB noted the need to support both simplified and traditional Chinese script in particular, as well as possible separate French and French Canadian translations, meaning that there may be multiple translations into the same language. EDItEUR felt happily able to handle that within their tools.

AI then completed the report noting all remaining items were in the rest of the agenda.

4. Discussion of need and potential timetable for development of *Thema* 1.2

HW outlined the proposals for 1.2, and explained the process. Proposals had been received from the French, Norwegian and UK groups. Further proposals to these could still be accumulated via the Google group, but the question for this meeting was to whether v1.2 should be launched in either Spring (London Book Fair) or Autumn 2016 (Frankfurt Book Fair).

HW noted that, whereas *Thema* was generally open to proposals for new values that had been identified as a requirement by a national group, in some cases it was appropriate to question the relative merits of adding further codes to the scheme to support new topics which could already be adequately expressed by combinations of existing codes. This 'building block' approach is a key principle of *Thema* and protects against unnecessary proliferation of new values. GB reminded the ISC of the need to balance the value of increased coverage of the scheme versus keeping the size of it within levels of manageability and complexity level that can be mastered by new users in a matter of hours without the need for extensive training.

Luc Audrain said the French proposals were the result of a review of the issues from mapping CLIL to *Thema*, where there is a lack of detail in *Thema* to handle some of the richer classification in CLIL.

HW suggested that volunteers should come forward either today or in the coming weeks for the technical subcommittee to handle *Thema* 1.2, and that it makes sense for those national groups that had proposals presented already to be represented in particular.

Chris Saynor queried if BISAC adding YA codes might mean a need for *Thema* to update to handle that imminently. GB suggested that *Thema* should wait some time after market implementation of BISAC YA codes to understand the value of the new subtree and the effect of potential issues. If the BISAC experience is positive, then *Thema* could go that way too in future. However, HW cautioned mixing too much information about *audience* into a *subject* scheme, where the audience information may have a better place elsewhere in common metadata schemes like ONIX.

The ISC concluded after comments from FF and LD that April would be better than October. MBR noted the issues for Denmark as they adopt, but GB reassured that introduction of 1.2 should not invalidate any work on 1.1 or break any current uses. Given the short timetable, HW encouraged all national groups to consider and proposed any additional values as soon as possible, prior to the release of v1.2.

ACTION: HW and AI to convene a technical subcommittee to handle *Thema* 1.2 in the coming weeks, and solicit any further proposals from national groups.

HW then noted the need to review national extensions, these may be added to the scheme perhaps as often as four times a year (same as with ONIX Codelists). GB noted that those agreed today would be published within a month. Nobody expressed any concerns about the proposed national extensions and they were agreed.

ACTION: GB to update published *Thema* online browser and spreadsheets with these changes.

GB commented briefly that we had approved two distinct processes of update here – one for the *Thema* 1.2 process where a sub-group of the ISC would work on the proposals to be agreed

finally at the London Book Fair, and another for national extensions where we could now approve these on a rolling quarterly basis. As ever, national extensions are not part of the core scheme and (if necessary) may always be ‘resolved’ by users in other countries to their parent heading.

PP noted that there may be a need to further educate users about the way in which national extensions operate.

5. *Thema* geographic extensions for those territories without National Groups

AI introduced a detailed but in-progress report on the geographic working group. The objective was to find a way by which more detailed geographic national extensions could be created for countries without an active national group. AI said he felt that the working group now had a mostly workable set of rules and some worked examples, but not yet a clear plan for governance. He expected there to be further work after Frankfurt and before London (hopefully before the end of the year) to complete the work of the group and produce some additions for countries not yet covered in *Thema*.

AI was concerned about how best to get the right discussion and examination of the ideas, not by widening the participation to the whole ISC but rather by focussing on particular issues to be considered, reminding the group that the aim is not to provide comprehensive coverage of the globe but to find ways of covering some notable and widely useful locations.

HW suggested it would be helpful to have further suggestions from national groups of countries that needed to be covered.

Emad Eldeen Elakehal queried the ability to handle changes as countries reshape their administrative geography. GB said there is no one way to handle that change other than using only physiographic geography, but that it is inevitable that there will be some change that we should handle. The case of Denmark as a peninsula and three [major] islands provides a reasonable way to express its geography, even though administrative geographical structure doesn’t handle it that way. EEE also queried the handling of historical geography, which HW confirmed are already included in some cases such as East Germany (as highlighted by Detlef Bauer). LA noted France is moving from 22 regions to 13 in 2016, and will have to revise its national extensions, and may need to use two levels to handle this in national extensions (due to their being insufficient letters of the alphabet for a single level listing of both old and new values).

JP was concerned that we ensure the objectives and methodology meet the overall objectives of *Thema*, and do not undermine or compromise the long term goals of *Thema* by meeting the short term need to provide geographical values for specific countries. JP stressed the need: to be transparent about use of official and local sources; to present any proposals to the countries concerned, especially the large countries not yet in *Thema* to encourage them to set up national groups to develop and approve their own geographic coverage; and to find ways of solving issues that countries to be covered have with books published in their country already. HW saw this in part as saying that the ideal solution is always to get a national involvement in *Thema*, rather than have to revise from a non-native standpoint. AI accepted the concerns, and noted the need to circulate proposals and seek contacts in countries concerned in some way, even if there was no active national group.

ACTION: AI to circulate current hit-list of countries for geographic working group. Progress on group to continue with aim to wrap up the group by April for London Book Fair and hope to have some output by end of the year.

6. Reverse mappings from *Thema* to national classification schemes

HW was asked at the previous meeting to develop a reverse mapping from *Thema* to BIC. There was a lot of interesting complexity raised whilst producing this, in particular in handling some sub-headings of fiction, and the fact that many Qualifiers in *Thema* were more closely equivalent to Subject Categories in BIC (eg Styles), sometimes to different Categories depending on the presence of other values on the record to be mapped. All known national extensions at the time are included in the mapping, but of necessity many of these map to a single value in BIC (eg numerous geographical extensions to a single country).

ACTION: Draft of the *Thema* to BIC to be published on the EDItEUR website for comments.

GB emphasised EDItEUR is always very happy to either link to or host any mappings produced by groups, and that groups should let EDItEUR have translations for the online *Thema* browser.

7. Updates from National Groups

HW then called for updates from each of the national groups present.

- Frida Fosseng (Norway) reported that Bokbasen has now run training on *Thema* (and on ONIX 3.0), and there has been strong adoption from booksellers. Also been working on marketing the scheme as well.
- Marie Bilde Rasmussen (Denmark) reported that translation was completed over the summer and now the National Library is producing a mapping from the old library system, which will be handed back to the publishers to correct and enrich. The trade will run the old classification system and the new *Thema* in parallel for a year.
- Sarah Wang (China) reported Chinese translation ready for simplified Chinese, with further work to come on traditional Chinese. Now planning to work on a website to support mapping (from the existing Chinese library classification) and training as the scheme goes into use. TC505 is also working with the Government to publish *Thema* as an official Chinese standard (as it has done with ONIX 3.0).
- Bruno Pacheco (Portugal) reported he was still waiting resolution of some internal issues within Publishers Association. There is a draft Portuguese translation, and the Association is using *Thema* unofficially in parallel as part of ISBN assignment (officially, ISBN assignment requires a UDC code, but this is difficult for publishers to provide).
- Francesca Cacciapaglia (Italy) reported they have completed a full Italian translation, and mapping from CCE finished last year. Not in use yet in some systems but development underway at present.
- Emad Eldeen Elakehal (Egypt) noted he was present as an observer but, in response to a query from GB, reported there may be scope to upgrade the Egyptian Arabic translation to cover all of versions 1.1 or 1.2.
- Merve Okçuoğlu (Turkey) reported the Turkish Publishers Association has now done 95% of the translation but it needs internal approval from Publishers Association before publication.

- Karina Luke (UK) reported a BIC Breakfast was planned for January as a marketing event to target smaller publishers and librarians in particular. *Thema* has been introduced in the training programme alongside BIC for classification. Nielsen, Bowker and BDS are able to accept and pass on *Thema*, and *Thema* codes are now arriving in data from publishers such as HarperCollins and Faber. *Thema* is to be included in an update of the metadata accreditation scheme as a measurable element, and in discussions on that, Amazon is already encouraging publishers to prepare for supply of *Thema*.
- Noah Genner (Canada) reported that on the English side there were 30,000 records from publishers with *Thema*. The online converter from BISAC to *Thema* is seeing thousands of uses per month. For BookNet Canada's own Biblioshare, there will be discounts for providing *Thema* from next year.
- JP (Spain) reported that publishers continue to be as they were but that expected some progress in the coming year.
- Virginie Clayssen (France) reported that publishers were still adopting latest version of CLIL, but that was designed to make mapping to *Thema* easy. There is two-way enhancement of CLIL and *Thema* due to that approach, a virtuous circle. VC also noted some work on educational labels and grades in CLIL, with a decision to be made on how to handle these in *Thema*.
- Detlef Bauer (Germany) reported that MVB formally launched VLB-Tix today at the Fair. Three major publishers – Random, Holtzbrinck, Bonnier – are now providing good quality *Thema* to VLB and others, but for smaller and more specialist publishers the situation was less advanced. Maybe 1/3rd of titles have poor classification (in both old WGS and new *Thema* schemes) and some mapping is not yet effective. Until that is dealt with, booksellers are not yet using the codes, but significant retailer adoption is expected in 2016.
- Alain Fournier (Canada) reported that BTLF has agreed to work on common French translation and mapping with ELECTRE. BTLF anticipates redesigning its sales tracking database around *Thema*, and will work with BNC on proposals for some further national geographic extensions in Canada.
- Mark Kuyper (USA) reported lots of proposals from the BISG subjects group, which will be fed into the review process for 1.2. BISG will update the BISAC to *Thema* mapping thereafter. PP noted focus had been on YA going into BISAC and, a bit like Germany, the need to get retailers to receive and moreover to demand *Thema* was key.

8. Any other business

FC asked for presentations from EDItEUR's International Supply Chain Seminar to be shared. GB agreed those would be posted on the EDItEUR website.

ACTION: GB to upload and promote the presentations, particularly those on *Thema*.

UPDATE: see <http://www.editeur.org/3/Events/Event-Details/301>

LA queried what the attitude is to the overlap between some *Thema* classifications and what may already be covered by audience code in ONIX. GB said in many cases Audience may well be a better location for such items than subject codes and qualifiers in *Thema*. GB noted this had come up in discussing the mission statement, and in consideration of the YA proposals for BISAC.

9. Date and location of next meeting

AI advised that although there was no confirmed location yet, the *Thema* meeting will be at the London Book Fair venue on the morning of Wednesday 13th April.

There being no other business to be raised, HW closed the meeting.

Graham Bell / Alex Ingram

EDitEUR

15th October 2015