Thema International Steering Committee
Minutes
Wednesday 13th March 2019, 10:30–12:00 GMT,
The Dark Room, London Book Fair, Olympia

Attendees:
Luc Audrain (Hachette Livre)  
Graham Bell (EDItEUR)  
Susan Breeuwsma (CB)  
Francis Cave (EDItEUR consultant)  
Sreejith Chellappan (Flipkart) – observer  
Ricardo Costa (Metabooks)  
Maya Fakundiny (BISG)  
Fride Fosseng (Bokbasen)  
Alain Fournier (BTLF)  
Fernanda Garcia (Câmara Brasileira do Livro (CBL))  
Noah Gemmer (Booknet Canada)  
Marcelo Gioia (Bookwire)  
Isabel Gouveia (Amazon EU) – observer  
Inari Haapaniemi (Kirjavälitys)  
Vladimir Krix (PRH) – observer  
Vit Krobot, (Karolinum Press, Charles University) – observer  
Tomasz Meka (Elibri)  
Katarzyna Nakonieczna (National Library of Poland)  
Brian O’Leary (BISG)  
Karine Pansa (Câmara Brasileira do Livro (CBL))  
Sofie Pauwels (Meta4Books)  
Tuula Pelkonen-Tiri (Kirjavälitys)  
Jesús Peraita (FGEE / DILVE), chair  
Christer Perslön (Bokinfo)  
Lisbeth Petré (Bokinfo)  
Simonetta Pillon (Informazioni Editoriali)  
Marie Bilde Rasmussen (Pruneau)  
Johanna Roden (Bokinfo)  
Suzanne Rozario (EDItEUR)  
Chris Saynor (EDItEUR)  
Bibi Setayesh (MVB)  
Tobias Streitferdt (Holtzbrinck Buchverlage)  
Karina Urquhart (BIC)  
Howard Willows (Nielsen)  
Reeta Windsor (Nielsen)  
Jon Windus (Nielsen)

Key Decisions taken:
– Ratification of Brazilian group
– Amazon very supportive of Thema globally
– National extensions ratified for Finland, Poland and Latin America

1. Welcome and introductions [Chair]
JP opened the meeting, welcomed everyone and asked them to introduce themselves.

2. Minutes of last meeting held 10th October 2018, and matters arising [Chair]
JP introduced the minutes of the meeting held at the 2018 Frankfurt Book Fair. There were no comments, and the minutes were approved.

CS also officially welcomed and asked for formal approval from the Committee for the Brazilian national group, which was agreed by all present.

3. Updates on adoptions from Thema national groups
Japan: CS gave an update on the Japanese group, unable to attend this meeting, but wanted to share that they have become very active and keen on implementing Thema in their market. JPO has provided revisions to its original translation of Thema 1.1 and these have been updated on the online browser. JPO plans to translate Thema 1.4 fully when it is published.

Brazil: RC gave an update on Brazil which is still in a learning stage. The BISAC codes are better known in Brazil because of Amazon, but CBL and Metabooks are building up awareness of Thema.
They are nearing completion of a Brazilian-Portuguese translation. They are also looking at possible training in the coming months as well.

Amazon EU: IG said the BISAC and Thema go hand-in-hand for Amazon, with BISAC more important in North America and Thema in Europe. In Europe, IG and her team work on the categories used for books on the sites, and match these to the metadata received. They are at the end of the chain, and do not work with the products themselves, but are trying to make sure the books get put in the correct categories. Inevitably, they notice that often there is no subject classification at all, and of course there is variation from country to country: sometimes they only get BIC codes, sometimes only BISAC codes. Some publishers remain unaware that Amazon EU has adopted Thema as its preferred main subject scheme, and so Amazon still maintains mappings from older schemes because publishers still send values only from those schemes. In France, many publishers still send older Decitre codes, some send only CLIL codes, and not many yet send Thema. In Spain and Italy, Amazon is not yet receiving many Thema codes, but there is a gradual switch happening. In Germany they are receiving WGS, BISAC and Thema and are having to manage all these different schemes to map to their own classification. It is mainly a problem of communication from Amazon, to let publishers and distributors know their preferred code scheme is Thema in Europe. Amazon would prefer not to have to maintain multiple costly mappings from all the different schemes, and would prefer to receive Thema codes in the data that publishers send. They want to get official subject schemes mapped to Thema as a next step for them but this still leaves the problem of all the titles with no subject codes at all.

JP asked if Amazon has an internal classification or a scheme, subject codes or families? IG replied that Amazon does not have its own classification scheme – the official and primary ones are BISAC and Thema. They maintain others because of the actual data they are getting and in cases such as Decitre or CLIL they will add new codes; in Germany they maintain WGS codes but do not add to them. However, the primary and most important are Thema and BISAC.

JP then asked if when you searched for a book on gardening or philosophy, how were these codes assigned – there must be some sort of internal categorisation of books? JP also asked how close was Thema to the internal classification and if it was meeting the needs? IG said that Amazon preferred to have a global classification scheme which could be sent to them in the metadata, and then to make it appear local, as appropriate, on different Amazon shop fronts. A single global scheme, rather than having to maintain multiple different schemes. As an example, history for children about the US Civil War would be important in US, but not would not be as prominent in Spain.

Certain categories Amazon wants to display do not have distinct Thema codes, so they will also use other metadata elements to choose where to display the title, for example, the title of the book, maybe some keywords as subject controls. Then a search for ‘gardening’ on an Amazon store, the gardening section of books will have titles that had Thema codes, BISAC codes or other schemes plus where necessary the other elements. Amazon has a Browse Tree Guide available via Vendor Central accounts, that gives guidelines about which codes to use for which section. They are very keen on Thema as it makes more sense for a global market and they are seeing more interest for this in countries like Japan and India.

UK: HW reported on the UK market continues show interest, awareness is being raised through training courses. Nielsen is planning to adopt Thema as its primary classification scheme during 2019. As part of this Nielsen has created a Thema to BISAC mapping for internal use but can be made available to others under licence. [Contact sales.book@nielsen.com for details.]

Denmark: MBR reported that in Denmark the backlists were classified by the Library service with Thema a few years ago but publishers were not adding Thema themselves after that, and so a gap has developed of titles with no Thema codes. Now the biggest online retailers Saxo and Storytel are
being proactive in their communication with publishers about their data and this is boosting interest in Thema.

**Belgium:** SP reported that in Belgium, they have had a couple of introduction sessions in January and the feedback was positive. It is early stages for them but there is a definite interest in the Belgian market.

**Netherlands:** SB said that CB has been doing introduction training sessions around Thema which were well subscribed. CB is working on technical solutions for the implementation of Thema in its own systems. Also working with some retailers to try and measure impact of adopting Thema on online sales. SB asked if anyone else had data or information about impact it would be interesting to share this.

**Czechia:** VK reported that Czechia is still at start of the process. Now getting positive feedback form some publishers and the national library. A first translation into Czech and Slovak should be published soon.

**Norway:** FF said that every book in Bokbasen has at least one Thema code, that is assigned by a Bokbasen librarian. More and more retailers are using Thema as the basis for their online sites. This is good as they also take into data from other sources. Seeing better automation for retailers as they no longer have to map from other schemes to their own. Also, there are two big projects, one around primary and secondary education, the other around academic e-books, and Thema is being used in both projects for search.

**Italy:** SP reported that the Italian trade is starting a major project to implement Thema as the main classification scheme. They are testing a new interface for adding Thema, and are hoping this will be ready for the summer. It is a complex project to get all books mapped to Thema from existing schemes. Also, the plan is to output Thema in the ONIX 3.0 feeds only for now.

**Germany:** TS said that in Germany all the publishers and retailers are very aware of Thema. They are working on new national extensions, especially for places. The website and suggestions form are now being used by a lot of people. The suggestions get reviewed by the interest group who also bring in suggestions from elsewhere. It has helped that Amazon DE has announced that Thema is its main scheme. There is more training being done, as an example, there will be a session during the Leipzig book fair, and more interest in Thema means group members are being asked on to panels and to conferences to talk about Thema.

VLB has been doing a big marketing campaign around Thema, and about 90% of books in VLB (German Books in Print) now have a Thema code, up from 50% two years ago. Publishers with products without Thema codes can get a list of these products and make suggestions for which codes to use.

The German group has nearly finished updated its mapping from WGS to Thema, which will be shared with EDitEUR when ready.

**Switzerland and Austria** have both started being more active with Thema and both are being proactive in making suggestions.

**Quebec:** In Quebec, there is good acceptance for the idea of Thema. AF reported that BTLF is looking at practical ways of updating its database, which is shared with a French partner, to allow for use of Thema and the Canadian French translation. The main retailer, accounting for about a third of the market, has committed to switching to Thema, as have the main suppliers. They are now entering into a period focusing on practicalities of this adoption.
France: LA said that the group is working on updating its mapping from CLIL codes to Thema. Thema is starting to be used in the books in print database, and publishers are implementing the mapping at least to add Thema codes to their metadata. Hachette implements Thema internally.

Poland: KN reported the Polish translation has been updated. There have been presentations about Thema and increasing interest. TM has created software to help publishers with recommended Thema codes and this is working well.

USA: BOL noted the new BISAC codes were published at end of 2018, and the mapping from BISAC to Thema has been updated. They have also decided to make a version of this mapping freely available via the EDItEUR website. This version will not have the headings of the BISAC codes, only the codes themselves, to protect the value of the licence for the use of BISAC codes.

UK: KU said that in the revised BIC Data Accreditation scheme – which will be launched soon – Thema will become compulsory from the outset to get Gold, six months after launch date of the scheme to get Silver and twelve months after launch date to get Bronze accreditation.

Canada: NG reported that BNC has updated its automated mapping tool (BISAC to Thema) in partnership with BISG. There is a growing use of Thema amongst domestic publishers, especially by regional publishers. BNC is going to start exposing Thema in its catalogue for index search. Both indie booksellers and the largest national physical retailer are somewhat committed to Thema, not processing internally but ask BNC to send them a flat file with Thema information.

Sweden: LP noted that in Sweden Thema is the primary classification scheme. Nearly all publishers are using it now, and most of the retailers. Bokinfo also has a process for adding or improving Thema codes in its data as necessary, they hold regular training and have an active Thema group.

Spain: JP said that in Spain, up to 2011 there were about 6 different schemes in use, but in 2011 they decided to switch the whole market to one scheme – which was ‘Thema 0.5’ (called IBIC at that time). Since then they have spent a lot of time moving the market form ONIX 2.1 to ONIX 3.0. As some publishers spent a lot on switching to IBIC, they do not all want to implement Thema, but because Amazon ES and others do want Thema, the central DILVE database will now implement a mapping. It works both ways from IBIC to Thema or Thema to IBIC. All records will have both, along with an indication if the codes were added by mapping or from the publisher. This means publishers and data receivers can still choose which they prefer. The automatic mapping will be implemented by September. For the Spanish ISBN agency registration is mandatory, and it uses IBIC codes at the moment. The goal is to make Thema mandatory in 2020, but until then they will accept mapped codes. The transition has been long and complex in Spain, but the goal is finish by mid-2020.

Finland: IH said the translation into Finnish is a work in progress. They are working on educating publishers, and there is increasing interest from retailers.

India: Flipkart joined EDItEUR last year. SC reported they have been working on mapping products that had a BISAC code to Thema and making sure all book products had some sort of Thema code. Starting discussions with others in the Indian book trade to look at educational codes, as this market very important.

4. **CS presented his Thema activity report (separate paper)**

   CS reported that as part of a training day organised by Publishing Ireland, EDItEUR had done a presentation on Thema, as well as ONIX and ISNI, to publishers in Dublin.

5. **CS presented the proposed new national extensions**
These had been proposed by the groups representing Finland, Poland and Latin America, covering Time period, Educational purpose and Interest qualifiers. There were no particular comments or remarks, so the codes were accepted unanimously.

GB explained that there is a lot of work between EDItEUR and the proposing group before they are submitted to the International Group. EDItEUR is very conscious of the need not to explode the number of new codes added to Thema, so that it remains usable, but also of the need to fulfil the role of Thema to be a global system with a local flavour. So EDItEUR wants to make sure we add the codes that are needed by the local book supply chains, but not add unnecessary codes.

TS suggested creation of guidelines for adding national extensions.

CS asked the TISC about what was the preferred frequency of publishing updates to national extensions, following remarks from data implementors that every 3 months is too frequent. CS asked if the group would be in agreement to switch to every 6 months, to correspond with the TISC meetings. The group voted to accept a cycle of twice a year for national extension updates. JP reminded everyone that National extensions do not have to be implemented by everyone, only by those who need them. Others can map the codes back to their core codes (by removing letters from the end of the code).

6. Planning for Thema v1.4

CS then moved on to preparation for next update to Thema. CS talked about reviewing all the different types of qualifiers and the guidelines that go with these. He used time period qualifiers as an example, where guidance was needed in order to make it clearer that these are about a period of time and not a specific event, and that they are meant for exceptional periods that cannot be adequately described using the existing century or decade categories. It is about making sure that Thema does not get too large with too many country-specific events, many of which could be mapped from existing periods of time.

There is also a clear need to make clear the distinction between periods of time and place.

CS also wants to look at Educational purpose qualifiers, to review creation and usage guidelines, to get balance between strictly national needs and codes suitable for multiple markets.

CS then asked the TISC for its opinion of whether they should create place-holder top level codes for education systems as it had done for place qualifiers. If yes, should these be for all countries, or just countries where there was a significant production of market specific textbooks from an existing group?

JP said if there is expertise about another country’s educational market, then there may be a case for the basic codes to be proposed, but not for any country where there is no expertise. Also, it is important for new national groups when they join to be able to look at their own markets.

HW said in his experience market-specific educational material ‘did not travel very well’, and it is probably better to leave this to potential national groups. RC agreed, and noted that in Brazil, recent experience of compiling a list of codes for ONIX showed even with local knowledge, it is a complex task, and you need different experts from a local market to get together and work out what is needed for that market.

LA brought up the current code 4CL – which uses the term ‘mandatory’ which is felt to be too UK-based. He suggested a more general heading, removing the word ‘mandatory’, so that it would be useful across multiple markets. CS confirmed this suggestion has been added to proposals for 1.4. No
decision was decided on this and it was agreed to come back to this in the next few weeks if anyone had thoughts.

CS also said that the guidelines around when to use YP codes for educational textbooks would be revised, as it currently had a certain ambiguity because of the use of the British English term ‘further education’. The idea would be to clarify that these YP* codes can be used with any pre-tertiary level (that is, primary and secondary) education textbook.

CS then went on to say everyone should have had access to a shared document with all the proposals so far received. CS said some of these came from national groups, active users of Thema, external questions or comments. Some questions came in around use of certain words or terms, for example, in JBSF3 – Gender studies: transgender, transsexual, intersex people – which reflects debates that are taking place in various countries about the use of vocabulary in regard to gender identity (a summary of the arguments for change have been included in the shared folder for proposals, but what appears to be the best terminology for one country sometimes appears inappropriate for another). This kind of question around the vocabulary we use reflects the importance of the oversight and revision process that is done by the TISC and the national groups, making sure that Thema remains relevant and keeps up with changes – but also remains global, understandable and easy to use on a local level.

CS also briefly discussed the suggested additions and modifications from Penguin Random House UK’s internal Inclusion Working Group. These categories are intended to improve the discoverability of titles around diversity and inclusion and were added to the suggestions after having been reviewed and discussed by the UK Thema group. The PRH group did a very thorough job of researching terms and number of titles, as well providing current book examples that could use these new categories. CS used this to highlight the importance of getting a wide range of active publishers, booksellers and librarians involved in proposing new codes.

CS then proposed a calendar for version 1.4. He proposed that the goal should be to ratify version 1.4 at the meeting at the London Bookfair 2020, and to publish it shortly afterwards, exactly two years after the 1.3 publication. The majority agreed to do this. CS noted his goal was to make the working group process as open and transparent as possible, to avoid excluding groups because of language or time zone constraints. CS said the first step would be a version of all the proposals sent to all groups to give them a chance to add further proposals or make any comments. These would all be collated on a single shared document that would be used by the working group and visible to all. CS asked for volunteers to join the working group to start work in August.

7. The Chair asked if there was Any Other Business.
   JW asked if the next meeting would be when JP’s term as chair finished? GB – said he would check and confirm this. JP asked for the date of the next meeting, and GB confirmed it would be at the Frankfurt Bookfair on Wednesday 16th October.

The meeting was then closed.

Chris Saynor
EDItEUR
13th March 2019