**Thema International Steering Committee Minutes**

**Wednesday 16th October 2019, 10:15–12:00, Room Brillanz, Hall 4.2 Frankfurt Buchmesse**

**Attendees**

Luc Audrain (LA) - Hachette Livre
Subrato Banerjee (SB) – Nielsen India
Detlef Bauer (DB) - Libri
Graham Bell (GB) - EDItEUR
Maria Börman (MB) - Bokinfo
Susan Breeuwsma (SB) – CB Netherlands
Francesca Cacciapaglia (FC) - Informazioni Editoriali
Francis Cave (FC) - EDItEUR consultant
Ricardo Costa (RC) - MetaBooks
Amikumar Dhal (AD) - Flipkart
Maya Fakundiny (MF) - BISG
Frider Fosseng (FF) - Bokbasen
Alain Fournier (AF) - BTLF
Bente Franck-Saetvoll (BFS) - Bokbasen
Michael Gordon-Smith, (MGS) - Australian Publishers Association
Isabel Gouveia (IG) - Amazon EU - observer
Inari Haapaniemi (IH) - Kirjaväiliytys
Jaime Ivan Hurtado (JIH) - Hipertexto - observer
Vladimir Kriz (LK) - PRH observer
Vit Krobot (VK) Karolium Press, Charles University – observer
Vikrant Mathur (VM) - Nielsen India
Gabrielle Maisonneuve (GM) - BTLF
Tomasz Meka (TM) - Elibri
Stephen Moore (SM) - Nielsen - observer
Katarzyna Nakonieczna (KN) - National Library of Poland
Erik Oosterwijk (EO) - Elsevier
Bruno Pires Pacheco (BP) - APEL
Jesús Peraita (JP) - FGEE / DILVE - chair
Christer Perslöv (CP) - Bokinfo
Flore Piacentino (FP) - SNE
Simonetta Pillon (SP) - Informazioni Editoriali
Vincent Pouvélaire (VP) - Dilicom
Marie Bilde Rasmussen (MBR) - Pruneau
Tom Richardson (TR) - BookNet Canada
Suzanne Rozario (SR) - EDItEUR
Sophie Salmon (SS) - CLIL
Chris Saynor (CS) EDItEUR
Tobias Streitferdt (TS) - Holtzbrinck Buchverlage
Karina Urquhart (KU) - BIC
Howard Willows (HW) - Nielsen
Jon Windus (JW) - Nielsen

**Key Decisions taken:**

- Ratification of group for India
- Addition of new National extensions for India, Norway, Japan and the Netherlands
- Discussion of timetable for updates – v1.5 for Frankfurt 2021
- Discussion for update timetable after 2021 to be started with implementors

1. **Welcome and introductions** [Chair]

JP opened the meeting, welcomed everyone and asked them to introduce themselves.

2. **Minutes of last meeting held 13th March 2019, and matters arising** [Chair]

JP introduced the minutes of the meeting held at the London Book Fair 2019. There were no comments, and the minutes were approved.

CS requested a formal recognition of a new national group India in absence of this meeting. They attended the meeting late.

3. **Updates on adoptions from Thema national groups**

French Canada: AF reported that there are now a few publishers who are active users of Thema. They are adding Thema to their online title’s submission form. Before it becomes more widely used there is a need more training. By the end of the year (2019) ca. 2/3 of the retailers will be supplied with Thema in their daily feed and BTLF are working with retailers on conversion and mapping from Thema to retailers’ own categories.
France: VP reported that in France distributors are not yet adding Thema categories to their data. However, Dilicom intend to add Thema codes automatically to data sent out, using the mapping from the CLIL codes to Thema. This mapping is updated every six months, when the CLIL codes are revised.

Portugal: BP No major updates since last year and still at v.1.2 – however, Portuguese publishers are beginning to get familiar with Thema classification but only using the ISBN services which APEL manages – not mandatory but an option and have observed that more publishers are using this classification and use is getting more comprehensive. Due to budget constraints they will wait until v1.4 before doing an updated translation. BP says there is a new board being elected and he will be telling them why Thema is important in their market. CS asked if they were thinking of working jointly with the Brazilians on translation? They would not as it cannot be directly translated – so there will be two versions like the French / Canadian French and Dutch and Flemish.

Australia: MGS reported that they created a group but not much action despite the interest – he was interested in the CB presentation of Thema in the Netherlands, at the Supply Chain Seminar (available on website). Not yet much interest by retailers in Australia, and this is one of the things needed to push use of Thema. Just had capability for ONIX 3 added in the bibliographical database Title Page and now have a 12-month window just opened-up for conversion by publishers to ONIX 3. As they take in data for ONIX 3, they will be scoring it in terms of quality (and pricing accordingly) and one of the rules will be for top level data quality the records should include Thema categories.

Denmark: MBR reported that in Denmark they have made it mandatory to include Thema categories in the physical supply chain, before it was only the digital supply chain. Now there is more engagement and awareness. The big digital retailers and streaming services are raising awareness of Thema and its importance and highlighting this with publishers. There are now more questions being asked to the Thema group and an awareness of a need for greater training. There is also now a gap between the titles that got updated automatically using a mapping and the new titles getting the categories because they are mandatory, but this will be caught up. It has been overall a very positive year in Denmark. They have translated the backlists and there is a gap between the backlist and the mandatory field.

France: FP said that the French group has adapted well. LA added that Flore from SNE is taking the lead for the French group this year.

UK: KU mentioned that from March 2020 Thema will be compulsory at all levels for BIC’s product data accreditation schemes and looks forward to its outcome – for both digital and physical products.

Germany: TS reported that Thema progressing well, however, there is still a huge percentage of wrong codes which is difficult for retailers to use but improving v.1.3 since June 2019 and the national group continues to grow (22 members) making things a little complicated due to a lot of suggestions for amendments. And especially now working on place qualifiers and making good progress via Google sheets where everyone can share and have their input for all to see. They have had between 40-60 suggestions from the book industry good response – also did a survey on Thema in shops and retailer systems and found that many are using Thema without actually knowing it as it is present in the search options in their merchandising software or is used in the white label shop fronts. Thema is quite complex but is proving quite successful in the search engines in Germany. There are also companies now building browse trees on their websites using Thema.

Poland: KN said that they have been in discussion with publishers about using Thema as well as training sessions. There have been questions made by several publishers about use of Thema for jigsaw puzzles and board games.
The Netherlands: SB did a presentation at the Supply Chain Seminar (available on website) and highlighted that the largest retailer in the Netherlands (BOL.com) measured a 5% increase in conversion to sales as an impact of Thema of adding Thema categories. Since they started in May 2019, they now have over 50 publishers now using Thema and 44% of titles now have Thema codes. More retailers are curious about Thema and how they could implement it into their systems to benefit in both online and offline sales. There is a lot of experimentation going on in the Netherlands. GB said that all the presentations from the Supply Chain Seminar will be available on the EDItEUR website. And asked SB if the graph from BOL.com which showed the change on sales between months was volatile, was remarkable and could be used as a tool to promote Thema?

Italy: FC said that they started using Thema two weeks ago; and mentioned all records in the Italian catalogues in-print now have one or more Thema code, the entire catalogue, for physical and digital products. Now the priority is to improve knowledge and awareness of Thema and as part of this GB did Thema training with IE in July. Retailers are not yet seeing the Thema codes in the files sent to them and continue to use the CCE codes. SP It has been a major investment of resources for IE as they have recategorized 2.5 million records and redone their system to make Thema the main categorisation. In January 2020 they aim to have the Thema codes in the output to Amazon Italy.

Czechia / Slovakia: LK – reported that the first translations into Czech and Slovak has been published for Thema v. 1.2, and they plan to skip v.1.3 and move to v.1.4 for the next translation, provided there is a national group set up. VK is in contact with and other research groups and publishers, which form the association of universities – about forming a national group.

UK: HW reported on UK market continuing to grow and is healthy among publishers. Awareness and promotional interest being raised through training courses at BIC and EDItEUR events. About 30% of publisher feeds sent to Nielsen now contain Thema codes, but as this includes the largest publishing group it represents a significant percentage of the UK output. Next step is to promote Thema more widely to booksellers. There has been support from Amazon and major booksellers like Waterstones and Blackwell’s who use Thema, which is made available for all.

Canada: TR from BookNet Canada said not much change on usage but focus mainly on education and awareness. The quality of Thema from larger publishers who have been using Thema for a while is constantly improving but it is more difficult to get smaller publishers to do anything – progress slow for Thema. Retailers are slower to adopt, although Indigo has expressed interest in using it. BNC has a sales tool that will be displaying Thema now as well.

Finland: IH – the Finnish translation is almost complete and should be ready by December 2019. GB did a training in Helsinki about use Thema. Reported that one retailer changed their website and using Thema – making good progress.

Latin America: JIH Shared information about how in Latin America, they have various initiatives with different associations. As an example, the Peruvian Book Chamber has launched a metadata system and website using ONIX and Thema which regroups over 40 publishers. A similar project is being used for the Columbian Book Chamber which also runs the ISBN agency as they are now starting to add Thema to all their records. In Mexico they have ongoing projects with about 50 university presses to create a platform and this will use Thema. Another project regrouping University Presses from nine LAM countries is also creating an international metadata platform and website using Thema and ONIX. In LAM there is a growing awareness of standards, including Thema.

Nielsen, UK – JW said that they are updating all mappings to and from Thema, BISAC and BIC – GB added that regarding Mapping - the BIC to Thema mapping – Thema to BIC mapping – are used widely in the UK – primarily comes from Nielsen – now on EDItEUR website and similar mappings
from the German and French group also freely available on the website. Also mapping from BISAC to Thema – all now available from EDItEUR website.

**Norway:** FF reported that publishers now suggest Thema codes, but Bokbasen librarians check and add and modify every detail to ensure consistency and correct use. Not all publishers have the Thema notes in their system but Bokbasen does and cross checks suggested categories. One major online retailer has already implemented Thema as their browsing structure on their website and a couple still working on the structure and hope to be added this year or early next year. As an incentive they give retailers a reduced rate, if Thema is implemented. Ongoing training on Metadata, ONIX and Thema. Thema is also used on all of Bokbasen own platforms.

**Sweden:** MB Business as usual – doing Thema training for publishers.

**USA:** MF reported that the US market still primarily uses BISAC and the 2019 BISAC codes to be published in December 2019 – followed by the mapping from BISAC to Thema.

**India:** VM Nielsen, India introduced themselves – said that Thema is new for the Indian business but they have been working with CS regarding the Test Preparation market and possibly additions to national extensions to the Educational Qualifiers specifically for the Indian market, which will be presented at this meeting. It is an exciting opportunity for the Indian market.

**India:** AD FlipKart, Indian online retailer – this year they mapped their online catalogue from Thema and in areas of Fiction and non-Fiction have been successful mapping from Thema codes. Their biggest challenge has been with Test Preparation and educational books. They reached out to publishers to ask for help with this and this formed the basis of the work with proposing the new national extensions and these should cover this section of the Indian market, which is the biggest in terms of sales – on a year on year sales basis the print side saw a growth of about 18%-20% and on the digital side growth is about 50%. The new national extensions will be really important.

**Spain:** JP said that they have about 1.2 million titles in their Books in print of which about 1.1 million now have Thema, as well as BIC categories. Because it has only been a few years since Spain implemented BIC, he said publishers didn’t want to switch to Thema as no-one down the value chain used Thema yet and retailers were not switching to Thema because publishers were not yet sending the categories. They used the ‘mappings’ or translation procedures from one system to the other (BIC<>Thema) to add categories from one or the other when they were missing. The one to one translation is relatively easy, but you lose a lot of meaning as the two systems are not equivalent. It is important to look at sets of codes and combinations. They carried out some tests and found 85,000 different BIC combinations on their database and that around 30% of BIC code combinations resulted in exactly the same code combinations in Thema. There are a high percentage of codes in BIC that give a different code in Thema but still have the same meaning. For all the data they receive from publishers if only BIC was present, they would add Thema codes from the mapping and also the same for the files that arrived with only Thema codes. They indicate in the database the records where the categories have been added via a ‘mapping’. If a publisher revises these ‘mapped’ codes, these will get marked as ‘native’, so anyone getting the data knows the origin of the categorisation.

The system was implemented about two months previously and since then of the 1.1 million records with both Thema and BIC codes there are about 150,000 records with ‘native’ Thema codes added by publishers like Gruppo Planeta, PRH, Macmillan; and many other publishers plan to migrate by the end of year taking to about 300K native Thema codes mapped by the publishers themselves. Now data receivers are also planning to implement Thema.

The Spanish ISBN agency (with over 2 million titles in their database) used to require BIC codes but now they are requiring Thema and accepting mapped Thema codes from publishers. During next year only native Thema codes will be accepted.
All of this has been accompanied by information and communication about Thema, there is a website about metadata and quality which has a section on Thema. There are info graphics, mailings and trainings for Thema. Migration for Thema is expected to be complete by next year when ISBN Agency requires it as mandatory.

CS – mentioned three updates on behalf of people who were unable to attend:

- **Latin America**: CERLAC is representative of Latin America except Brazil – sent CS an update and would like to hear from other national groups – to share experience of implementing Thema. As they are dealing with several countries with various needs. They’ve been promoting Thema and ONIX together with national ISBN agencies – made an update of some of the documentation.

- **Flemish, Belgium**: Apology from Sophie, said they continue with training. Several publishers including two of the largest online booksellers - BOL and Standard Boekhandel – have started using Thema, more Flemish publishers are starting to look at implementation.

- **Japan**: sent update to all and did a lot of work on Thema and are transitioning to Thema now – with an on-going big project. They have done one complete revision of the translation into Japanese. They are mapping between the multiple schemes used by retailers and publishers in Japan. They are trying to have Thema as a core and make Thema as the unique code to be use in the future.

- **Amazon Books** – via book classification, represented by Isabel Gouveia, as an observer and are fully committed to Thema as their preferred subject code. In North America, they still prefer either BISAC or Thema. Isabel is a member of the working group for Thema 1.4 as is KOBO, who don’t use Thema but are interested in Thema as a classification scheme.

4. **Report on current Thema developments and activity report.**

CS – reported that the Thema v1.4 working group has started work and is making great progress. It is meeting fortnightly for approx. two-hour conference call and thanked everyone for participating. The document used by the working group should be visible to all the members of the TISC. The group is considering all the proposals based on the needs of the book chain. CS gave some examples of the type of categories that have been requested and these have been outlined in the *Thema Activity Report March – October 2019*: some of the highlights from this.

- **Place qualifiers** – German language group looking at place qualifiers, the UK group are reviewing the notes that accompany their place qualifiers.

- **Language qualifiers** – Mostly adding clarifications here but a few proposals for new categories.

- **GB added re Language qualifiers**: that a book is ‘in a language’ that would go into ONIX and if the information/book is ‘about’ a language then it will be classified as Thema.

- **Time period qualifiers** – all national extensions being reviewed and revised – for consistency of presentation and language. To make it clearer this is a section about periods of time, rather than events, it is proposed that all of these qualifiers will start with the dates now.

- **Educational qualifiers** – all these are being reviewed to ensure consistency of wording and presentation, for example the top level categories under 4Z. There are revisions and new category proposals particularly from the Indian and Latin American groups.

- **Interest / Age qualifiers** – received only one request to add ‘from 18 years’ for age groups.

- **Also, proposals to add qualifiers relating to people with various physical and neuro-diverse conditions so they are not only in the ‘issue’ area of Thema categories and that can be used with appropriate subject code, including the Y section. Interested to have feedback on this. Quite a few new 5H suggestions by the Latin American group to reflect the diversity of publishing around various national and religious holidays/festivals and also a new qualifier in the 5P section for books of interest to indigenous peoples.

- **Style qualifiers** – this section has been completely reviewed, we have added notes and cross-references especially when there are effectively duplicates styles categories present, because they have different names in different languages. There are several proposals for style qualifiers...
that are non-European i.e. Mughal style or pre-Columbian styles. There is also a proposal to reserve the combination 6, letter, X as header for any future sub-categories if a letter gets full up.

- **Timeline** for *Thema* v.1.4 to have a final draft proposal to national groups by February 2020 – to allow for reviews and ratification at London Book Fair in March 2020 - goal is to publish this by April 2020.

CS welcomes any comments and best to send before the final draft publication in February 2020. GB warned not to put the URL of the test version of the *Thema* online browser for version 1.4 on a website, as this will lead certain search engines to index the test version which can cause further complications – and also specifically not to share with other people outside your national groups.

‘Synonyms’, ‘alternative labels’ or ‘hidden search terms’ – this feature allows words to be added to aid searches and this has been used a lot in English. Not available publicly and if a national group wants to add their own language ‘synonyms’ there is no need to get approval from TISC, providing these are suggested by one of the official groups.

GB added that the idea is that if a person searches for a particular word, where or which category do you want them to find. Also, EDItEUR can provide anonymised weblogs from its browser to show what users are searching for in your languages.

TS said the German language group was thinking about expressions or terms that were different in Austria or Switzerland and asked if this was the solution for this? GB said there are two possible solutions one being synonym and the other language of variations – e.g. Dutch / Flemish or French / Canadian French, and either could be an option for the German language translation.

The ‘synonyms’ are made available through the SQL file on occasion to big implementers of Thema usually EDItEUR members (people building their own browsers within their own systems like EDItEUR) and so they would have access to the ‘synonyms’ on *Thema* file whereas most who download the spreadsheet don’t have access.

**Ongoing progress with translations** – we now have 21 full or partial translations. There is still no update on the Chinese, Korean or Greek translations. We have received a request to translate *Thema* into Kiswahili, the main language for much of East Africa. If anyone has documentation on *Thema* in their own language, EDItEUR would be happy to also put a link on its website.

**Training and documentation** – as part of update of *Thema* v.1.4 all documentation will be revised with any changes or to add new examples. Goal is to update at least the Basic Users Guide and the Executive Briefing after April 2020. Plus bring out new documentation for better guidance about certain areas, such as using or creating new national extensions, advice for booksellers and other implementors of Thema.

CS asked if there were any other questions/comments about the report?

**Thema national extensions October 2019 proposals for additions to Thema v.1.3** – see handout

CS went through some points on handout especially for India, Japan, Norway and The Netherlands, which are linked to market requirements. Announced that Japan is to launch *Thema* by the end of this year. India needs a whole new set of qualifiers for Education. Norway needs 2 extra codes for its education system.

CS asked if anyone had questions/comments about the proposals? There were none.

All agreed to adopt the proposals and should expect updates by next month – the update of *Thema* v.1.4 will be in April 2020. GB added that it would be best to have proposals for national extensions in December 2019 or January 2020 in time for updated *Thema* 1.4

5. **Timetable for Thema v.1.4** – major discussion for updates of *Thema* 1.4 appears to be on a two-year cycle – asked if that is the right frequency cycle for updates and regarding national qualifiers – what should the frequency cycle be for this?
BF suggested the updates should be at least once a year because of volumes of updates, and demand for market requirements are rapid and not delay for two years. There is a need for more rapid responses to requests to users of Thema who want new codes for new concepts or trends and the two year cycle is too slow. JP replied that there were two aspects to address: publishing world is fast-moving, and a wealth of new concepts will be trending, and we need to be ready to respond – and there are new countries with new publishers asking for new codes and some may be solved with national extensions but others not. JP mentioned that the resources for carrying out these updates are limited and EDItEUR does not have the manpower to deal with such workloads. JP thinks that a two-year update is too long – given that the market is fast moving. GB thinks it’s not just about EDItEUR resources but agrees with JP on the desire for a quicker update cycle. GB said it’s also about the implementers, who need more stability with versions to allow them time to implement a new version. BOL added that BISAC in the USA has an annual update – and suggested if more frequent updates are done, approval should be done in Frankfurt rather than in London – this is because it would allow BISAC to match their cycle of updates and also sales reporting is based on a calendar year basis – so that this can be implemented around the same time. HW said that the UK group has no strong views, this should be demand led, but we need to be wary of too frequent updates, but finds that there are too many versions of BISAC and impossible to keep up – there’s pool of version-less updates that people are not aware of – can lead to concerns and off-putting. People need stability. BF said that she wants to add new codes and not deprecate. Having more updates will make Thema more relevant and should have a slow frequency of Thema just to do mapping. SB agrees with Norway, to encourage markets to embrace this, you cannot wait two years for updates. RC as a new user in Brazil also agrees with BF and people are coming with new suggestions and there is a need to move more quickly than every two years and he feels that we should move with the times. LK – for large publishers like, PRH they have to update each time there is a new BISAC update or Thema, and this means get the developers to add the updates, review existing records (about 250 000), and then manage the feeds while data receivers catch up with implementation of new versions and feels that two-years is best. LA said that CLIL codes get updated every six months but, as an example, the update to the religion section took two years as there is a lot of work done beforehand and he felt that a two-year cycle is reasonable for huge updates. FP said that in France, the schemes was updated every six months, but this did not mean publishers, distributors or retailers were also updating or even making use of the new categories and as with Thema, there is a need for more training and communication. GB suggested that provisionally we should plan to update v.1.5 in 2021, or 18 months in time for Frankfurt and then review a 12 month cycle subject to a wider discussion with implementors around resourcing and practicalities. This gives time to start conversations. This was agreed to.

6. **Election of new Chair** – Francesca Cacciapaglia, from IE, Italy has accepted the role of Chair and will take over the meeting at the London Book Fair in March 2020. CS thanked JP for his term as Chair.

7. **Any Other Business** JP – asked if there was Any Other Business. CS made a formal recognition of new national group of India. Meeting was adjourned.

8. **Next Meeting** JP said the next meeting would be held on Wednesday 11 March 2020 at the London Book Fair – time and venue to be confirmed.