Thema International Steering Committee Minutes

Wednesday 11th April 2018, 10.30-12:30 GMT (UTC+0), The Dark Room, Olympia, London

Attendees:

Luc Audrain (Hachette Livre)  Martin Lüning (MVB / VLB
Graham Bell (EDItEUR)  Ayuko Matsuo (Amazon JP)
Maria Börman (Bokinfo)  Katarzyna Nakonieczna (National Library of Poland)
Susan Breuwisma (CB)  Brian O’Leary (BISG)
Francis Cave (EDItEUR consultant)  Karine Pansa (CBL), guest
Francesca Cacciapaglia, (Informazioni Editoriali)  Dominique Parisi (EDITIS)
Michel Cervellin (BTLF)  Sofie Pauwels (Meta4Books)
Ricardo Costa (Metabooks), guest  Jesús Peraita (FGEE / DILVE), chair
Emad Eldeen Elakehal (Ibiidi), guest  Christer Perslöv (Bokinfo)
Fride Fosseng (Bokbasen)  Simonetta Pillon (Informazioni Editoriali)
Alain Fournier (BTLF)  Vincent Poulverlari (OLUCOM)
Bente Franck-Sætervoll (Bokbasen)  Marie Bilde Rasmussen (Pruneau)
Olivier Fuchs (Meta4Books)  Johanna Roden (Bokinfo)
Noah Genner (Booknet Canada)  Sophie Salmon (CLIL)
Marcelo Gioia (Bookwire), guest  Chris Saynor (EDITEUR)
Isabel Gouveia (Amazon), guest  Henning Schoenenberger (Springer Nature)
Edyta Hagan (ILO), guest  Bibi Setayesh (MVB)
Nishant Khurana (Flipkart), guest  Howard Willows (Nielsen)
Lada Kriz (PRH), guest  Jon Windus (Nielsen)
Karina Luke (BIC)

Key Decisions taken:
– Ratification of Thema v1.3

1. Welcome and introductions [Chair]
JP opened the meeting, welcomed the observers from India, Brazil, Czech Republic and from Amazon EU. JP also officially welcomed and asked for approval from the Committee for the new Belgium group, which was approved.

2. Minutes of last meeting held 11th October 2017, and matters arising [Chair]
JP introduced the minutes of the meeting held at the 2017 Frankfurt Book Fair. There were no comments, and the minutes were approved.

3. Updates on adoptions from Thema national groups
AF – French Canada had its first meeting of its new Thema group, there is a lot of interest in Quebec.
IG – Amazon EU are encouraging publishers to use Thema in the EU.
SP – Most publishers have endorsed idea of adopting Thema in the Belgian market. The first step is a translation into Dutch with the Netherlands group, as part of their close collaboration.
BS – German market is working on a revised translation that will also translate v1.3, they have been organising a lot of trainings and have worked with educational publishers to encourage use of new educational qualifiers.
ML – Also German group working on proposed updates to place qualifiers for Germany, Austria and Switzerland.
FF – Norway continues running combined ONIX and Thema training twice a year for publishers and booksellers.
DP – France has just published an updated version of its mapping from its own national scheme Theme CLIL to Thema v 1.2 and have added a national extension for French as a Foreign Language certification.

KP – just there as an observer from Brazil as they are at an early stage, they have just started with Metabooks to create a central repository for book metadata in the Brazilian market.

EE – in Arab speaking world, most publishers not using standards at all, but last year some started with ONIX and Thema. IBIIDI allows publishers to enter data and then IBIIDI will export it using ONIX and they use Thema as well. EE also went to a publishers meeting in Cairo and to the Cairo Book Fair and introduced Thema and ONIX. IBIIDI will also be offering a data distribution service for publishers in the Arab speaking world, that will use ONIX and Thema.

HW – UK group has implementing Thema training twice yearly organised by BIC, and is encouraging publishers to use Thema (still alongside BIC for legacy reasons). Nielsen is moving to Thema as primary scheme, HW is completing the updating of mappings from Thema v1.3 to BIC.

LZ – Czechia / Slovakia observer said the group is currently working on finishing a translation into Czech.

AY – Japanese Thema group, looking at current Thema codes and identifying if there are things missing for the Japanese market.

BL – in the USA, new BISAC codes were published in November 2017 as usual but the updated mapping from BISAC codes to Thema will be delayed until after the publication of Thema v1.3

MB – Denmark introduced Thema 2 years ago and it is being used more and more. There are issues with booksellers who do not want to implement it yet or with small publishers who only send one code. The Danish Library will add codes, but MB said if anyone had ideas for how to promote Thema then these would be helpful.

KN – In Poland there have been training for publishers, positive meetings with the largest bookseller in Poland, the National Library is mapping from UDK to Thema and using this to help with updating the Polish translation.

KL – the new version of BIC Product data accreditation scheme is being prepared and it will make Thema compulsory at all levels.

FC – Italy (specifically Informazione Editoriali) is working on implementing Thema in their new books-in-print database.

JP – Spain moved to IBIC* 2011 from existing 5 schemes and that was a lot of work, so a move to Thema is complex. Some have moved, and some do not want to do this yet, so there is a need for IBIC and Thema mappings, in the Spanish market. Based on mappings supplied by Nielsen and looking at combinations in IBIC and mapping these to Thema where possible. This means that everyone can get IBIC and/or Thema as preferred and DILVE will also inform receivers if the codes are based on mapping. IBIC still mandatory, for another year, Thema is already available in the DILVE system as an option so publishers can add these. Soon both will just be optional, and publishers can choose which they use.

* IBIC was a pre-release version of an internationalised BIC scheme, which formed the underpinning of Thema as we have it today.

4. **Report on proposed updated for Thema v 1.3** [CS]

CS introduced the proposed updates to Thema for v1.3, and his report. First, CS thanked the members of the Thema v1.3 working group, Frida Fosseng, Martin Lünig, Howard Willows, Lisbeth Håkansson Petré (Bokinfo – not present), Michael Olenick (Bowker US – not present) and Detlef Bauer (libri.de – not present). CS also thanked all the members of the ISC and their national groups for the suggestions they had sent, their feedback and comments, all of which were very welcome and highly valuable.

CS – explained how the process for Thema v1.3 had worked. There were over 800 proposals and the working group (WG) spent a lot of time discussing each suggestion, their merits, how many books were available that could use a new code, how easy was it to use an existing code or combination of codes. Once a suggestion was accepted then there was discussion to make sure it was added to the right place to give the right context.
CS – then read out the statistics from the report saying there were 261 new core subject codes taking the total number of core subject codes to 2971. There were 396 proposed modifications to core subject codes most of which are just modifications to the notes – but included 126 modifications to the wording of the headings. CS said that the statistics showed that some sections had more work done on them than others, and that future updates may need to look at some of the sections that had very few updates this time, for example Law and Medicine. For Qualifiers there were 153 proposals. Of the 98 new Place Qualifier codes, 55 were new national extensions including from proposals from the Japanese national group & 10 from the Slovakia interest group.

CS noted that when making choices they looked at how easy and accurate it would be to classify a title using existing codes, whether it was possible with just two codes, and then whether or not there were many titles available in the supply chain. On these bases, many of the proposed codes were rejected. However, these rejected suggestions were often added to notes or as synonyms to existing codes. As an example, CS said, there were a lot of suggestions for the Romance section and there are many types of Romance. One suggestion was Holiday Romance but with existing Romance codes plus holiday qualifiers from 5H, there was no need for a new code. As another example, CS noted that there was a suggestion for a new core code for ‘Diasporas’ but it was felt this would be better as a new note under existing code JBFH – Migration, immigration & emigration.

GB noted that when someone implemented Thema in a system, it was important that both headings and notes were clearly visible as the heading is not always clear enough when taken on their own.

CS also noted that proposals that could be clearly expressed elsewhere in ONIX were rejected. He noted that there was a lot of clarification work done to headings and notes to help with translations, for instance in the Fiction section to clarify existing codes and to add new codes so that it was clear which genre was meant.

CS said there were some interesting new codes to allow for greater granularity, as an example a new code in Travel – WTHW – called Travel Guides: Routes and Ways. The group saw that there were a lot of guide books published that dealt with footpaths, cycleways etc and that the existing codes did not allow for enough distinction for these guides.

CS noted that the only top level code that was modified was T, but reminded attendees that (effectively) the change also applies to all the codes underneath T in the hierarchy. The change was to make it clear that the codes could be used to describe associated skills, trades & professions and therefore could be used with vocational training books etc.

CS said that the WG did a lot of work on standardising the notes so that they were clearer. Now there are three main types, ‘class here’ to indicate other or alternative subject headings, ‘Use for’ to give extra detail about the headings, and ‘use with’ to give guidelines on using with other codes.

JP asked where the ‘see also’ notes were. GB said they are implemented in a slightly different way, so in the spreadsheet they appeared in separate column but on the browser, they were still visible as text, as well as in the html, pdf and xml versions. JP says that it is important that the translations also reflect this new clarification and asked if all the changes were highlighted even if it was only the addition of use for: GB confirmed this was the case.

EE asked if examples of using subject codes and qualifiers could be included. CS said that EDItEUR was working on a document to show worked examples. EE said that it would be good if there were also examples on the browser. CS said that EDItEUR were working on improving the existing documentation and adding a new Question and answer document. At the moment there were no plans to add it to the website.
JP noted that a small number of the codes that have been added were codes that had been in BIC but were not included in the first version of Thema, and that if there was a need for other new codes in the future, it is a good idea to check and see if a BIC code had existed before and see if the same code can be added to Thema as this makes it easier for the mapping process.

CS went on to report that a lot of work had been done on the Y section. As the fiction codes for children and teenagers can be combined with children’s / teenage non-fiction codes there was work done on clarification or adding new codes to allow for a greater range of combinations particularly appropriate for the teenage / young adult markets that have a greater variety of topics. CS also highlighted the addition of a new code, YXP, to highlight books aimed at the young that deal with issues and topics around diversity and inclusivity and that could equally be used with Children’s / Teenage fiction codes. CS reported that there has been a lot added to notes about combining with other codes, to help those who are just starting out with Thema understand that more precise meaning can be created by combining codes.

CS said that the WG group had reviewed all the qualifiers except the place qualifiers, which had all been reviewed by a recent working group. He noted that there was a new group of qualifiers, 5L, for the stages of life, that could be used with any subject when the theme of the book dealt with a particular age group. These were not audience codes but thematic qualifiers.

CS went on to report that 5AR – For reluctant readers (children) and 5AX - For emergent readers (adult) have been modified and notes added as they might not always have been clear for translators and considering the importance of these qualifiers when they are appropriate, especially for librarians and educators, the group decided to propose updated headings and a scope note. Also, that a new qualifier, 5AZ, was added to highlight books for people with learning or communication difficulties.

EE asked about 5PB and how it could be used as the definition of what was a minority group varied so much. A group might be a minority in one country but the major population in another. CS noted that the proposal for v1.3 removed the notion of ‘minority’ from the qualifier and was now broader, so it could be used with various existing or future national extensions.

HW said that the WG would like to thank CS for all the work he had done on the v1.3 proposals and GB seconded that and also thanked the WG for all their work.

GB asked how the ISC wanted to proceed with ratification of v1.3, if they wanted more time to consider the proposals. AF said he was waiting for comments from the French-Canada group. BL said the US group had said they were happy with proposals. BFS said she thought the proposals were going to be ratified at the meeting. GB said this was the intention but as there were a lot of people at the meeting he wanted to check if any group wanted more time or not. GB asked if the ISC was happy to proceed with ratification at the meeting. BL said that the process had been very inclusive and open and that he supported ratification at the meeting. AF seconded this motion. LA also said CLIL preferred ratification at the meeting. GB asked if anyone did not want to ratify the proposals at the meeting. There being no replies, GB formally proposed that v1.3 be ratified, and there were no objections, so GB declared that v 1.3 has been adopted.

GB said that now EDItEUR would proceed with updating and publishing new documentation and adding the new English version to existing translations, so these were ready for updated translations.

CS then went on to report that the WG had also added a lot of ‘synonyms’ to the Excel spreadsheet. He said ‘synonyms’ was just shorthand as these words could be alternative headings, useful keywords or actual synonyms. These would be available on the translation templates for the national groups who could use them to translate any relevant terms into their own language or could suggest their own, which can be added at any time to the online browser. These words are just to guide searches on the online browser, and do not form a part of the main Thema documentation.
GB said that the SQL database also has the synonyms in it and this is available to EDItEUR members – and if anyone did NOT want their ‘synonyms’ included in the SQL database made available to members then they should inform EDItEUR.

HS suggested there could be more reflection and conversation later about better ways of suggesting ‘synonyms’ in a more automated way. GB agreed this could be something to discuss in the future.

CS then reminded attendees that following Frankfurt 2017 an updated version 1.2 was published with the new national extension place qualifiers plus some German educational qualifiers. A handful of the place qualifiers were held back as they depended on codes due to be added at 1.3. These would now also be included in the 1.3 update automatically.

CS updated the ISC on training. EDItEUR had delivered Thema training in the USA through BISG, alongside the ONIX training. This training is also something that EDItEUR can deliver in other markets in English or French or can help national groups with advice about training. CS also asked that if any national groups do training, please share any feedback with the ISC and /or EDItEUR so we can all learn what works and what does not.

CS noted that no new language translations have been added but that the Spanish, French and German have updated their translations with the new national extensions for place qualifiers (where their place names differ from the those commonly used in English).

CS also noted that EDItEUR may need to look at the time period qualifiers to clarify the guidelines for adding these and also to look at the Style qualifiers to see if there was a way to better present these in the translated versions.

CS then highlighted the last point of the report. The ISC should think about the strategy for the next five years. Do we start planning for version 1.4? Should we start planning for version 2 already? GB said part of this was about backward compatibility. If we make changes, for example how the hierarchy is arranged, that means it is no longer backward compatible – and this would be a version 2. If we add new codes or update headings, while retaining that compatibility, then this will be a version 1.x.

JW said we should consider what might be the driver to go to a version 2. GB said this was a good point, any idea of a version 2 would only be because there was a clear need or improvement that could not be accommodated in 1.x and would justify the loss of compatibility. Maybe we need to think about current pain points?

BFS said there should be a more transparent process for the addition of new codes. She noted she was surprised by the number of suggestions that had been made for v1.3. Seeing the list of suggestions might help decide if we need to work on v 1.4 sooner or later. GB said that prior to WG for v1.3 there had been few suggestions but once the WG had been set up, then a lot more suggestions came in. GB said that there is a balance between updating regularly and stability, that is why Thema is on roughly a two year cadence. JP pointed out that there had been eight iterations of v1.2: True, but GB noted that this had been because of the addition of national extensions only and that all core codes and qualifiers remain the same in all those iterations. MB said demand is important but instead of just regular updates we should also look at how Thema is performing in individual markets, what could be done better, what are problems and the updates could be seen more as answers and solutions to these problems.

GB suggested that the Google group should be used for suggestions for new codes. BL said that the update of BISAC codes was well established process and suggestions could be made via the BISG website. They get from 70 suggestions a year so about 150 over a two year period. GB noted the Thema update was about 260, but the scheme was obviously less ‘mature’ than BISAC. BFS noted that if we were getting over 200 new code suggestions, maybe an annual revision is necessary? BL said he could share some statistics about recent BISAC code changes, how many new codes, modifications and deletions. JW noted
that if we updated too often, there was a risk of getting people left behind on older versions or if we moved to version 2 this would also create the issue of some using the old system, some the new. GB agreed and noted that Thema is still relatively new and is settling in. CS noted that as an example, when the French worked on their mapping, they noticed gaps in both schemes and this caused a spate of new suggestions and this can happen when other groups start using it and look at existing national schemes. There is no issue about making these suggestions more transparent.

5. **Any other business** [Chair]
   
   There was no other business.

6. **Next meeting** [Chair]
   
   Will be at 10:15am on the second day of the Frankfurt Book Fair (Wed 10\textsuperscript{th} October 2018).

Chris Saynor
EDitEUR
11/04/2018