Thema International Steering Committee Minutes

Wednesday 10th October 2018, 10.15-12:00 GMT (UTC+2), Room Brillanz, Hall 4.2, Frankfurt Book Fair

Attendees:

- Luc Audrain (Hachette Livre)
- Detlef Bauer (Libri Gmbh)
- Graham Bell (EDITEUR)
- Maria Börman (Bokinfo)
- Susan Breeuwsma (CB)
- Francis Cave (EDITEUR consultant)
- Ricardo Costa (Metabooks), guest
- Catriona Ferguson (PANZ), guest
- Fride Fosseng (Bokbasen)
- Alain Fournier (BTLF)
- Bente Franck-Sætervoll (Bokbasen)
- Noah Genner (Booknet Canada)
- Marcelo Gioia (Bookwire), guest
- Michael Gordon-Smith (Australian Publishers Assoc)
- Alexander Haffner (MVB)
- Tomasz Meka (Elibri)
- Katarzyna Nakonieczna (National Library of Poland)
- Brian O’Leary (BISG)
- Bruno Pacheco (APPEL)
- Dominique Parisi (EDITIS)
- Sofie Pauwels (Meta4Books)
- Tuula Pelkonen-Tiri (Kirjavälitys)
- Jesús Peraita (FGEE / DILVE), chair
- Christer Perslov (Bokinfo)
- Simonetta Pillon (Informazioni Editoriali)
- Vincent Poulvelarie (DILICOM)
- Marie Bilde Rasmussen (Pruneau)
- Johanna Roden (Bokinfo)
- Sophie Salmon (CLIL)
- Chris Saynor (EDITEUR)
- Bibi Setayesh (MVB)
- Rikke Skov (Politens Forlag)
- Tobias Streitferdt (Holtzbrinck Buchverlage)
- Karina Urquhart (BIC)
- Howard Willows (Nielsen)
- Jon Windus (Nielsen)

Key Decisions taken:

- Ratification of Australian group

1. Welcome and introductions [Chair]

JP opened the meeting, welcomed everyone and asked them to introduce themselves. He noted the seating arrangements and commented that with the release of 1.3, things were being done very differently...

2. Minutes of last meeting held 11th April 2018, and matters arising [Chair]

JP introduced the minutes of the meeting held at the 2018 London Book Fair. There were no comments, and the minutes were approved.

JP also officially welcomed and asked for approval from the Committee for the new Australian group, which was agreed.

3. Updates on adoptions from Thema national groups

CS – explained that this item was now moved up the agenda to allow time to hear from the different groups as at some previous meetings there had not been enough time and it was very important to hear form each group.

DP – The French group will be holding a meeting in November to discuss how to promote Thema’s use in France, especially for international sales. The French group has completed the new translation of v1.3, and the mapping from CLIL codes to Thema v 1.3 has been finished but needs to be validated at the November meeting. LA – Hachette Livres has implemented the mapping and just coming into production. DP – Editis have the mapping as part of their system and are making use of the Place and
Time Period qualifiers as well (as these have no equivalent in CLIL) at least for Fiction and guides. Dilicom is also going to start implementing Thema in its data feed for retailers from the end of 2018. KN – Polish group has a new member Tomek (TM) who was helping with the promotion in Poland. They were planning a presentation and training around Thema at the Krakow Book Fair at the end of October. They have also started on updating of the v1.3 translation.

HW – UK group promotes Thema and provides training through BIC. The ‘reverse mapping’ from Thema v1.3 to BIC v1.2 has been completed and is now available via the EDItEUR website. Nielsen wants to move to using Thema as its primary categorization but there is a lot of process to update. HW is also working on a Thema to BISAC mapping for Nielsen as an internal project, but Nielsen may consider making this available (either commercially or freely).

MB – Sweden’s biggest bookstore has finally stopped using BIC, so now everyone is using Thema in Swedish market and the Swedish translation has been up dated to v1.3.

TPT – Finland has nearly completed the first translation of the Thema codes (planning to finish early 2019) and it is already being used by publishers selling to digital resellers and is by Kirjaväliitys for digital content. Kirjaväliitys hope to have it in use for physical books by the end of the year and are adding Thema codes to their ONIX records that are available via their web service. They are also talking to publishers in Finland about how they might use it and working with National Library.

AF – In French Canada, Thema will be the only schema used in the new BTLF cataloguing system which is due to be operational early 2019.

SP – Belgium is completing the translation into Flemish and planning first introduction session late 2018 or early 2019 for Belgian publishers and Booksellers. They have started informal conversations with various publishers & retailers.

BP – Portugal is translating version v1.3 and aiming to publish this by the end of 2018. In Portugal it is only the ISBN platform that is currently using Thema. There is no books in print platform in Portugal so hard to promote Thema in Portugal.

CS welcomed CF from the Publishers Association of New Zealand as an observer. CF said that not much had been done yet, but there are a few key publishers and Nielsen Bookscan in New Zealand who are keen to start getting involved, as well as the National Library of New Zealand. They are keen to set up a working group to start looking at use of Thema for New Zealand.

TS – Germany has translated Thema v1.3 and this has been published. The German group has completed its initial suggestions for new German Place Qualifiers and will be submitting these soon. They have also set up a little task force to look at Place Qualifiers for Switzerland, plus they are looking for people to help with this in Austria. They have a working group made up of publishers looking at what Thema codes might be missing for the German market. There is also a new online form for German users of Thema to make suggestions for new code. CS asked if the Switzerland working group covered all of the Swiss market or just the German-speaking market. TS confirmed it was mostly the German-speaking part.

BOL – confirmed that the updated mapping from BISAC to Thema 1.3 has been published and was made available to anyone who subscribed to BISG or had licensed the BISAC scheme.

MBR – Denmark has updated its Danish translation to Thema v1.3. The backlist was already assigned Thema codes but there has not been a lot added to new titles, so working with distributors of physical books to get Thema codes added and – hopefully – make it mandatory to use Thema.

RC – Brazil has a working Thema group with Metabooks, The Brazilian Book Chamber and several publishers. Working on promoting Thema in Brazil, it is not yet mandatory in the database as publishers are more familiar with BISAC codes, but now with the mapping, if a publisher enters a BISAC code, they get a suggested Thema code as this helps with getting publishers used to Thema. They have just finished a translation into Brazilian Portuguese, and it is being reviewed at the moment. CS asked if this was based on the original Portuguese translation. RC confirmed it was for the subject codes, but not the qualifiers. BP asked if Portugal could see the translation so they could compare and see where they were close. CS reminded the group that EDItEUR can do language variants for any translation that needs it, where there are only parts of the translation that differ. This can be done for Portuguese if it proves necessary, and also potentially for French, Spanish etc.

MGS – an Australian group is working on proposals for national extensions and there is growing interest for using Thema in Australia. The National Library is also very interested. There has been an
initial introduction to Thema provided by EDItEUR but there is need for greater awareness and understanding in Australia via further training. They will also look at rules imposed on the TitlePage system in regard to metadata.

KU – BIC the UK Standard Library Categories library subject scheme is looking at mapping from Thema, as it currently maps from BIC codes (which are no longer being maintained)

NG – BookNet Canada has updated its online tool for automatic mapping from BISAC to Thema which uses the mapping provided by the BISG. The National Library has also expressed an interest in taking Thema codes. From January 2019, BookNet Services, the BNC bibliographic, catalogue and sales data services, will start showing Thema codes along with BISAC.

SB – in the Netherlands the retailers are very keen to use Thema and this has motivated the publishers who have been doing the translation work to finish the project. Hope to use Thema from 2019. Working on creating a tool that will allow publishers to enter a short description of the book and they will get a suggestion of suitable Thema codes.

FF – In Norway, the translation has been updated to version 1.3 and book categorisations have been updated in the Bokbasen database where necessary. Thema is now mandatory when publishers send data and there is a financial penalty when Thema is missing. They are also continuing with Thema training twice a year.

JP – In Spain the IBIC scheme (which in effect lies midway between BIC and Thema) is still mandatory, and DILVE has created a mapping from IBIC to Thema. There is a growing interest in Spain in using Thema itself, and some publishers are already including Thema in their data feeds. Amazon Spain has also shown interest in Thema codes (since ‘browse by subject’ in Amazon’s European storefronts is based on Thema). Spain has also been helping Latin American ISBN agencies with updating their systems to use ONIX 3.0 and Thema, but this is a slow process. It’s a complex market but the Agencies are very aware of the need to update their systems.

4. Activity Report

CS reported that all the documentation relating to Thema version 1.3 has been updated in all the languages and formats (XML, HTML, Excel, PDF, JSON) as well as on the online browser. The SQL file (available to EDItEUR members) has also been updated and sent to the members who had requested it. The SQL file has all the information that appears on the browser version, including the codes, all languages, notes and hidden synonyms. No new translations added to the 16 publicly available.

CS thanked HW for contributing the mappings from BIC v2.1 to Thema v1.3 and from Thema v1.3 to BIC v2.1.

CS added that all the existing support documentation has also been updated to include version 1.3 codes.

Three new documents have been published and are now available on the EDItEUR website. There is a new paper on using Thema and ONIX together, presented in the form of 30 questions and answers and designed as a supplement to the Basic User Guide. The purpose of the document is to get Thema users to look at the subject codes in relation to the rest of their metadata especially as sent in ONIX 3.0 files.

The next new document is the Thema worked examples, illustrated use cases for 50 real-world books showing of how Thema could be assigned, presented in a clear and visual style to make it easily to reproduce in other languages. It is designed to help both beginners and those already using Thema. This is a first version and will be revised in the future. CS invited national groups to submit examples to him if they wish. CS said that work had started on worked examples illustrating use of Thema for Educational titles and books for children and teenagers. The idea will be to share with the national groups, to get feedback on use, especially when it came to the concept of crossover titles (that is titles that are suitable for both younger and adult readers), to avoid issues in the supply chains. EDItEUR had also been requested to add some worked examples illustrating use of the comic book...
codes, as well as more examples using the qualifiers, particularly the 5* interest qualifiers and 6* style qualifiers.

FF commented that the document was useful, and they had been considering how they could use it in Norway. HW said that there had been comments in the UK group that it should possibly be broken down into different subject areas to make it more useful for publishers who do no fiction titles as an example. CS noted that the examples used in this document were all coded by himself and were meant to illustrate principles rather than being a definitive ‘correct’ classification for each title and that the publishers of those titles may have better classifications for them. The document was meant to help by giving guidelines and to help people think about how they could use Thema.

CS specifically requested some examples from the German group of educational titles using the German national extensions, to feature in forthcoming educational worked examples, as the complexity of the German educational market would make for interesting cases. JP said the approach to documents was really good, but one thing that was missing – considering how important qualifiers are in Thema compared to other schemes – is the use of <MainSubject> in ONIX with Thema qualifiers. It would be a good idea to include guidelines about this in updates to the documentation.

The third new document published was EDItEUR’s Diversity and inclusivity briefing, which grew out of a discussion with the Inclusive Minds organisation. CS also mentioned that in the UK Penguin Random House had established a Inclusion Working Group with a specific metadata workstream which had decided to look at Thema specifically after reading this paper, and were working on submitting codes to the UK group. MBR said that the paper was good but wished to highlight that ‘autism’ should probably not be included in the list of examples under the qualifier code 5AZ (For people with learning / communication difficulties), as difficulties with social interaction were not the same as communication difficulties. She suggested this code should be reviewed for the next update.

CS reported that there had been no proposals so far for new national extensions to add to v1.3.

For the next version of Thema (v1.4) there have already been some suggestions which have been added to a Google document and shared with all members of the TISC. JW asked if the document showed if a code had been requested by more than one group and CS said that could be added to the document if that was the case – but also stressed every suggestion should be viewed on its merits. GB said that in some cases, it may be better to add similar but not identical suggestions separately, so that an eventual working group could see the nuances of different requests and take this into consideration. CS pointed out that EDItEUR has been encouraging people to join the Thema implementors group (a mailing list) so that this could be used in the same way as the ONIX mailing list. It could be a useful place to gather suggestions or comments about Thema.

Finally, CS reported that EDItEUR had delivered Thema training in the USA as part of the BISG program, as well as some in-house training for publishers along with ONIX training. A short introduction to Thema was done for Metabooks and The Brazilian Book Chamber via webinar, and a similar event was organised with the Australian Publishers Association for the new Thema group there.

5. Timetable for possible updates to Thema

JP reminded the group that there had been a document at the previous meeting in London outlining some possibilities for a new version – either a v1.4 or a v2.0 – of Thema and possible timetables. CS reminded the group that this document at LBF was to promote questions and discussion, not to lay down the roadmap. The big difference between 1.4 and 2.0 was if the group decided it wanted to delete codes or move subjects around within the hierarchy, this would need a version 2 of Thema and would create all the usual issues linked to having two versions. If the group felt able to carry on with modifications and additions, then this would be a version 1.4. LA asked why codes might be deprecating? CS replied that there are a few codes that some consider are in the wrong part of the hierarchy. BFS commented that is was more about moving rather than deleting subjects, but GB noted it was both: in fact, a handful of codes had already been moved slightly between v1.1 and v1.2
(for example, the category for Tibet changed parent, even though it remained the same code. Small
moves where a new parent is interposed are not particularly problematic. There is also a possibility
of creating ‘parallel’ codes, as was done for certain place qualifiers (there are already a handful of
categories of this type. CS reminded the group that these parallel codes were created as ‘preferred
codes’ and this was indicated in the note. The old codes are still valid, and while not formally
deprecated, the effect is similar. JP commented that there are minor modifications like the place
qualifiers that were ok but other sections might need more major reworking. As an example, he
talked about the Law section which because of major cultural differences in legal systems around
the world, needed a major overhaul and this would need a new version. GB agreed – Law is a good
example of where it is impossible to create a perfect hierarchy as Thema is designed for a global book
trade and therefore there would always be these mismatches. He also noted that there are other
sections that could probably be done differently: medicine, certain sciences, books for teenagers.
What the TISC needs to decide is how urgent it feels the need for work on a new version 2 is, as this
could take several years to complete, or should we concentrate on working toward v1.4?

BFS asked if they needed to choose between the two? GB replied that was not the case, it was about
getting the balance right. CS said that if work was started on v1.4 the same group could also note
things that could be changed at v2 as a start of this process. CS reminded the group Thema was only
5 years old, still relatively new and just getting adopted in some markets, and so bringing in a major
new version would create challenges. GB reminded the group that with new versions of standards,
it can take several years before they are adopted and a switchover might take a decade. BOL
commented that creating a non-backward compatible solution should not be a priority as it might
have a negative effect on the adoption of Thema. It is better to get more adoptions and the existing
version settled in. DB also pointed out that a new version should not be a priority as the German
market was just getting Thema beyond the basics, and it was too soon to think about a new version.
DP said that for the French market is was also the same thing, it was too soon to be thinking about a
version 2.

MBR commented a version 2 of Thema should come from business need, not just from a feeling it
‘should’ be updated for the TISC members.

JP raised the question of whether there should be a concept of national extensions within the subject
codes as well. GB viewed this as a possibility, but although it could be done with backwards
compatibility, it would be a big change in the underlying ‘principles’ of Thema and thus would also be
a version 2 question.

LA asked about the use of <MainSubject> when there were several qualifiers and several subjects. To
which subject does the qualifier apply. GB asked if there were real world examples where this was
very important and if anyone had real world examples where this makes a difference to end user,
please share them with him.

JW pointed out that we need to be aware of the limitations of Thema and to be open about these
and give people best practices on how to use these. HW commented that Thema must remain
relatively simple and pragmatic, and not aim to mirror some of the highly detailed library systems.
JW, commenting on the balance between v2 and version 1.4, noted that there would need to be
compelling reasons to embark on v2 – stability is better at the moment.

CS summed it up saying that there does not yet appear to be significant demand for starting work on
a version 2, and that the time should be spent on working toward v1.4 and improving existing
documentation. The decision will be made at the next meeting at LBF to decide on the timetable for
version 1.4.

6. **Any other business** [Chair]
SP – in Italy from January Thema will be available in the IE-Online database but for the moment there were no specific customers requesting it, so it is a slow process in Italy.

DB asked if any national groups had mappings, these should be made available publicly and openly to facilitate the migration to Thema from existing subject schemes. For example, the existing mapping for the German subject scheme WGS to Thema. GB asked if anyone knew if the WGS to Thema mapping was currently available form anywhere? SP said there will be a mapping from CCE to Thema and this would be made available when finished.

MBR had a question from the Danish group about an API for retailers towards the latest versions of the codes. GB said it depended what kind of API they wanted but that the browser had a URI for each code in every language which would return HTML. He noted that the scheme was not highly dynamic: new codes and categories were released in a controlled manner, so a real-time API was not a high priority.

BFS asked for confirmation of what had been decided on v1.4. CS replied that work would not start on it yet, but a decision on the timetable would be made at the next London meeting but that the shared document for proposals was already available and any group was welcome to add suggestions.

DP reminded the group that when they did the first version of the mapping from CLIL to Thema the process highlighted codes that were ‘missing’ from Thema and generated proposals for future addings. This was a good process for any group doing a mapping or implementing Thema for the first time.

TM asked if ‘deprecated’ codes were clearly marked. CS replied that no codes had yet been formally deprecated, and that for the parallel place qualifiers where there were two codes, one was labelled as the ‘preferred code’. They were all labelled in the same way in the notes.

7. **Next meeting** [Chair]
   Will be at 10:30 am on the second day of the London Book Fair (Wed 13th March 2019).

Chris Saynor
EDITEUR
10th Oct 2018