

# Executive Director's report to members

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*London Book Fair, April 2014*

## Introduction

This is my first report to members as the new Executive Director of EDItEUR. Before beginning, I wish to give sincere thanks to Mark Bide for his tireless work on behalf of EDItEUR over many years, and in particular for his work as Executive Director for the last five. I am also personally very grateful for the support and guidance he has provided me, and I hope that EDItEUR's association with Mark will be continued over the coming months and years. And I wish to thank the Board of EDItEUR and its executive committee for its confidence in appointing me Executive Director. I have been very encouraged the many messages of congratulation that I have received from EDItEUR's members – thank you.

## Overview and highlights

The six month period has been – as usual – very busy for all EDItEUR staff. Highlights include:

- the launch of the new *Thema* standard as 'the subject classification scheme for a global book trade' has been truly exciting. Interest has been high in many countries, and the main documentation was downloaded over 3000 times in the first three months of availability. A key endorsement of the scheme was secured from the International Publishers Association. The challenge, of course, will be to maintain this momentum as the scheme becomes more mature and the scheme enters real-world use.
- the International ISBN Agency has completed a major project to replace its website and the underlying database infrastructure which is used for management of the ISBN prefix system and provides support to the ISBN agencies around the world. Stella Griffiths and Nick Woods are to be congratulated on this – it represents a lot of hard work. The new website and database were developed and are supported by CINECA.
- a minor revision of ONIX 3.0 (version 3.0.2) has been released, and awareness of the sunset date for ONIX 2.1 has increased. Significant progress has been made by some IT vendors who have now released ONIX 3.0-compliant versions of their applications, freeing their customers to migrate to the latest version. However, migration is still slow, particularly in the most established ONIX markets (English- and German-speaking markets).
- the ICEDIS group has reconfirmed its intention to replace the core fixed-format ICEDIS standards with modern XML-based equivalents, and this will form a major strand of work over the next two years. Tim Devenport has continued to focus on the ONIX-PC message as a 'gateway' to other ONIX for Subscription Products standards, and this strategy is showing some success.
- the Linked Content Coalition has transitioned from a project to an organisation, and EDItEUR has become a founder-member (along with EIDR, IDF, IPTC, NISO, Plus). The organisation brings together interested standards bodies across multiple media

sectors, and aims to sustain and further develop the work of the original project in developing standards for rights communications.

- EDItEUR is recruiting a new member of staff to work on standards like ONIX, EDItX, Thema and EDIFACT.

## 1 Board appointments

The EDItEUR Board meeting held during London Book Fair 2014 marks four years since the appointment of Neil Wilson of the British Library as Treasurer of EDItEUR, and the end of his term of office. This means that we are currently seeking a new member of the Board to act as Treasurer. I am sure all members of EDItEUR will join me in wholeheartedly thanking Neil Wilson for his four years of work as Treasurer.

## 2 Membership news

I want to welcome four new members to EDItEUR since the last members meeting, the Association of Learned and Professional Society Publishers, Google, IPR Licence, plus the London Book Fair itself. And I wish to thank all other members for their loyalty over the years and their support of the standards work we do.

## 3 EDItEUR standards activity

### 3.1 ONIX for Books

At the ONIX International Steering Committee meeting in October, Laurent Dervieu of Electre was elected as chair for a three year term, succeeding Noah Genner of Booknet Canada. Thanks are due to Noah, and I look forward to working with Laurent. The ONIX ISC meeting also ratified Issue 23 of the ONIX codelists, and the outline for a minor updates to ONIX 3.0 which has become version 3.0.2.

Since that meeting the ONIX national groups have also ratified Issue 24 of the codelists, and Issue 25 has been prepared – it is currently under consideration and it expected to be ratified by the steering committee immediately prior to the members meeting during the London Book Fair. Issue 24 was released at the end of January, and included:

- the ability to list printer and binder (of the first printing) alongside the publisher, required in some countries for legal deposit purposes
- a method for handling languages that are outside the ISO 639-2/B list (ONIX relies primarily on this list of languages, but there are only around 400 languages included. ISO 639-3 lists around 8000, and there are occasional requests to add others. The ONIX codelists can now handle any language by adding codes on request
- additional codelists required by ONIX 3.0.2

Issue 25 proposes only a very small number of additions, including:

- a new contributor role for Film editor
- a widely-used ATOS complexity scheme
- product forms for dedicated audiobook players, jigsaws and apparel

ONIX 3.0.2 – also released at the end of January – includes a number of new features, mostly in response to requests received from ONIX national groups and individual EDItEUR members:

- a <NoPrefix> tag for titles, allowing a positive statement that the title does *not* include a non-sorting prefix like 'A' or 'The'
- a <NoProduct> tag for sending 'empty updates' – in effect confirmations that no changes to metadata have been made
- a new composite for adding licence information for e-publications. It includes web links to specific licences for digital resources (for example, a CC-By licence attached to an open access monograph)
- a new <CopyrightType> element, so phonogram and other rightsholders can be listed (previously, ONIX was limited to listing copyright holders)
- a tag for associating a contributor with a particular town or city (not just a country or region, as in earlier versions of ONIX). This was the single most-requested update
- a modification to <SalesRestriction> to clarify that sales restrictions operate within particular territories, and which means it is now possible to have a retailer exclusive in one country or market that is exclusive to a *different* retailer in another country or market
- updates to the <Stock> composite which bring ONIX 3.0.2 into alignment with the EDItX Stock report message
- linked prices (for example, a e-book that is discounted if the paper equivalent is purchased at the same time)
- the addition of price identifiers, proprietary IDs that can be used when a single product is available at multiple price points (for example, different prices for different customer groups). The intention is that these identifiers can then be used in revenue reports, and they will need to be added in a future revision of the EDItX Sales report message

The XML schemas, the main *Specification* and the *Best Practice Guide* for ONIX 3.0 have been updated. A couple of longstanding but minor technical errors in the documentation were also corrected.

The 2013 training programme ended with a successful session in Oslo. The 2014 training programme has already begun with sessions delivered in New York (for BISG), Toronto (BookNet Canada), Montreal (BTLF) and London (for BIC). There are now a graded series of courses available, ranging from a basic introduction to metadata and identifiers, through the established 'standard-level' ONIX course to a new 'advanced-level' ONIX course. If you are interested in running training courses in association with EDItEUR, get in touch.

No significant progress has been made during the period on the ONIX Acknowledgement message or the online browser for ONIX codelists due to pressure of other work. It is intended that this be picked up in the next period. However, the Acknowledgement message is in limited piloting in France.

## 3.2 Thema

The *Thema* International Steering Committee held its inaugural meeting during the Frankfurt Book Fair, and Howard Willows of Nielsen was elected as Chair for the first three year term.

The intention is to manage *Thema* in line with the established procedures used with ONIX. Nine Thema National groups were represented (Canada, Germany, Spain, France, UK, Italy, Norway, Sweden and USA), with observers also present from Japan and Russia.

The meeting ratified *Thema* version 1.0, which had been widely discussed in the period leading up to the Fair, and – following a few agreed minor corrections – it was released on 1<sup>st</sup> November 2013. Following the 'sunrise' date of 31<sup>st</sup> December, *Thema* is now considered 'ready for use'.

A number of resources are now available:

- an executive briefing on the scheme
- the main list of subject headings and codes (as a spreadsheet, in English, which is the 'hub' language for translations)
- translations in German and Norwegian (Italian and French translations are likely to become available soon, possibly before the Book Fair. A translation template is available on request)
- user instructions for classifying books
- an online *Thema* category browser, which is multilingual, and has recently been updated to include the Norwegian translation (<http://editeur.dyndns.org/thema>).

In January, the International Publishers Association announced its endorsement of *Thema* as a global subject classification scheme, and distributed a version of the briefing document to its members.

Initial feedback and proposals for a version 1.1 of *Thema* have been collated from the National groups, and will be considered by the *Thema* International Steering Committee at its meeting during the London Book Fair. These proposals are at an early stage, and will not result in an immediate 1.1 release – the most likely option is that a 1.1 will be released around October 2014.

International interest in *Thema* continues to build, with Australia and Japan being the most advanced so far, and I look forward to the establishment of other new *Thema* national groups.

### 3.3 ICEDIS and ONIX for subscription products

The ICEDIS meeting in Frankfurt elected Shilo de Vries of Taylor and Francis as co-chair (with Dan Heffernan of Advantage) for a three-year term, as Keith Whiter of Elsevier stepped down. Many thanks to Keith for his work as joint chair over the last three years.

The meeting also re-affirmed the intent of the committee to establish XML-based replacements for the core ICEDIS transactional message standards, and the expected timetable for standardisation of the new messages. This will be a multi-year project, and work will begin in earnest on this during 2014.

In March, Tim Devenport ran a second successful full-day ONIX-PC (Price Catalog) workshop, in Wiesbaden, Germany at the offices of Otto Harrassowitz. Attendees included representatives of Nature Publishing Group, Ullstein, Springer, CUP and LM Info. These workshops aim to demystify the complex family of inter-related standards originally termed

'ONIX for Serials'. Focussing on ONIX-PC as the entry-level standard will allow organisations to build back-office developer familiarity with ONIX XML standards, and provides significant benefits to individual implementers during the annual re-pricing round.

The workshops ensure greater interoperability among the early and new adopters of the ONIX-PC standard, and it is hoped that they remain a regular feature of the EDItEUR programme. Tim is keen to run a North American workshop, and if this would be of interest, please let us know.

Issue 7 of the ONIX Codelists for use with ONIX-PC and related standards is in preparation, and will be ratified at the forthcoming ICEDIS meeting, which will be held during the UK Serials Group Conference in Harrogate, England in late April.

Like ONIX-PC, ONIX-PH is another journals-related standard, but one tailored for communications between repositories which provide long-term digital preservation of e-journal content. This message has been adopted by the Keepers Registry, a service run by EDItEUR member EDINA (part of the University of Edinburgh), and a growing number of the repositories have adopted it.

### 3.4 ONIX-PL

The NISO project to encode a number of publisher's licences using ONIX-PL has now come to an end. The NISO project – ably supported has EDItEUR consultant David Martin – demonstrated the practicality of the ONIX-PL approach, and has not revealed any shortcomings beyond the need for a handful of new codelist values.

### 3.5 EDItX

Only a little new work has been done with any of the EDItX standards – over the past six months, consultant Francis Cave has dealt with a small number of requests for information and minor extensions to the existing message suite, and there has been some exploration of the need for extensions to the EDItX Sales reporting messages to cope with new business models.

For the next period, I hope to spend some time improving the documentation for the EDItX Sales report message. The <PriceIdentifier> element added in ONIX for Books 3.0.2 will need to be added to the EDItX message as it is reviewed.

## 4 Identifier standards activity

EDItEUR provides management services for a number of key publishing identifiers.

### 4.1 International ISBN Agency

Stella and Nick have remained exceptionally busy over the last period. The build of the new website and redevelopment of the underlying database infrastructure meant a heavy programme of functional testing and user acceptance tests continued from September until early March.

The new website and database have now been launched, and initial reactions to the design and content, and to the functionality, have been good. The new infrastructure, hosted by CINECA – a non-profit consortium of 69 universities and 3 other institutions which is Italy's

largest computing centre – provides a reliable, well-managed platform to deliver services to the 150 national ISBN agencies, and it is expected that the enhanced functionality of the portal will encourage more of them to make use of the site in their normal business. The new database should also make the annual collation of data for the *Publishers International ISBN Directory* (published by De Gruyter) a much simpler task.

The revision of the ISBN standard agreed by ISO Technical Committee 46 Subcommittee 9 at its meeting in June 2013 has now started. In October, 12 national members of TC46 SC9 agreed to serve on the ISBN revision working group, and a substantial group of standards experts has been assembled to contribute to the process. The first teleconference meeting of the working group was convened in February by International ISBN Agency Executive Director Stella Griffiths, and a face-to-face meeting will be held in May in Washington DC, USA. This revision of the standard is wide-ranging, and will take into account developments in e-book and digital multi-media products over the period since the last revision (2005).

Final preparations will begin soon for the 2014 ISBN Annual General Meeting of national agencies, planned for September in Istanbul, Turkey.

## 4.2 International ISTC Agency

EDItEUR provides a limited secretariat service to the International ISTC Agency.

ISO TC46 SC9 announced in January a ballot on whether the ISTC standard should undergo a review (similar to the ISBN review above). This ballot is a standard part of the ISO standards process, and is run among the 30 participating members of SC9, and is open until mid-June. The ISTC Board released a statement in February recommending re-confirmation of the ISTC standard 'as is'.

## 4.3 International ISNI Agency

EDItEUR also provides similar secretariat services to the International ISNI Agency. As a standard, ISNI is at a somewhat earlier stage than ISTC, but looks to be gaining significant traction in the market. Secretariat work for ISNI – delivered ably by Nick Woods – continues as normal.

## 4.4 Linked Content Coalition

The Linked Content Coalition (<http://www.linkedcontentcoalition.org/>) began life as an industry-funded project that aimed to develop a framework within which a standards-based infrastructure for highly-automated rights trading could be developed. Its aims – and its participants – were multi-national, and cross-media. The LCC project delivered a rights reference model, and sets of principles for identification and messaging.

The project ended in April 2013. Since then, the EC-funded Rights Data Integration (RDI) project has begun (<http://www.rdi-project.org/>), and it intends to test and demonstrate the use of the LCC-developed framework in a testbed or pilot-scale rights exchange.

As a result of the level of support that the LCC project attracted, and the need to continue development of the LCC framework outside of any particular project, LCC is now being transitioned to a permanent consortium of standards bodies with representatives from organisations in all creative sectors. A new organisation has been created, Linked Content Coalition Limited, with six founder members:

- EDItEUR
- International DOI Foundation (<http://www.doi.org/>)
- International Press Telecommunications Council (IPTC) (<http://www.iptc.org>)
- Entertainment Industry Digital Registry (EIDR) (<http://eidr.org/>)
- PLUS Coalition (<http://www.plusregistry.org>)
- NISO (<http://www.niso.org/>)

and strong support from the European Publishers Council which instigated the original LCC project. Once the legal entity is established (expected to be before the Book Fair), further members will be invited to join (for example, organisations with strong links to various ISO TC46 SC9 identifiers), and the organisation will commission further development work on the LCC framework.

## 5 Major project activity

### 5.1 ARROW Plus

EDItEUR work on ARROW Plus is complete, and the project has now ended.

### 5.2 Linked Heritage

EDItEUR work on Linked Heritage is complete, and the project has now ended. The end-of-project review by the European Commission commented favourably on the work of WP4, which was led by EDItEUR (specifically by Michael Hopwood, who is now working with project partner MVB). EDItEUR's work in this area is being continued by Europeana's own Public-Private Partnership Task Force.

### 5.3 Enabling Technologies Framework

EDItEUR's work on this project – previously funded by the World Intellectual Property Organisation – has also now ended. EDItEUR is very proud of its work on accessibility, and the various deliverables developed by Sarah Hilderley over the three years of this project are now hosted on the WIPO website ([http://www.visionip.org/inclusive\\_publishing/en/](http://www.visionip.org/inclusive_publishing/en/)). Sarah is continuing her involvement in the accessibility area, and is also working with the International Digital Publishing Forum (IDPF).

### 5.4 Digital Cultural Heritage Roadmap for Preservation (DCH-RP)

Tim Devenport continues his work on this project, and is likely to remain involved until the end of 2014. In particular, he has been brokering contacts between the cultural heritage preservation sector and organisations in the commercial and academic publishing sector with significant digital preservation expertise (such as the Keepers Registry mentioned above).

## 6 EDItEUR is hiring...

Finally, in order to ensure that progress can continue to be made on a broad range of EDItEUR standards development, EDItEUR is recruiting a standards editor. This is a new, full-post, based in London, working on the full range of EDItEUR's technical standards (ONIX, *Thema*, EDItX, EDIFACT and so on). Further details are of course available direct from me

(Graham Bell, +44 20 7503 6418, [graham@editeur.org](mailto:graham@editeur.org)), or from the EDItEUR website (<http://www.editeur.org/files/annoucement/EDItEUR%20Standards%20Editor%20Ad.pdf>)

## 7 Regular EDItEUR Meetings

Don't forget that there are regular meetings at both the London and Frankfurt Book Fairs at which EDItEUR members and others are very welcome – we hope to see you next week at the meetings which are appropriate to your interests:

- ONIX for Books International Steering Committee (London and Frankfurt Book Fairs): participation through national groups, observers by arrangement
- Thema International Steering Committee (at London and Frankfurt Book Fairs): participation through national groups, observers by arrangement
- ICEDIS (at UKSG, Frankfurt and possibly the Charleston conference): open to all EDItEUR members with an interest in serials, non-member observers by arrangement
- Members Open Meeting (at London and Frankfurt Book Fairs): open to all members of EDItEUR, plus non-member observers by arrangement

If you need more information, email [info@editeur.org](mailto:info@editeur.org)

Graham Bell  
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