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BIC METADATA SUB-COMMITTEE MEETING – Minutes

Location: CILIP Building, 7 Ridgmount Street, London WC1E 7AE
Date and time: Thursday 7th September 2017, 2pm
Minutes taken by: Alaina-Marie Bassett

Present

Alaina-Marie Bassett, BIC
Graham Bell, EDItEUR
John Bell, HarperCollins Publishers
Catriona Brown, Canongate Books
Toby Gill, Virtusales (delegate)
Eric Green, BDS
Azar Hussain, Faber & Faber
Eleanor Jones, Pan Macmillan
Lada Kriz, Penguin Random House (delegate)
Karina Luke, BIC (dialled in)
Clare McLean, Dorling Kindersley

Fawzia Nazir, Ingenta
Chris Saynor, EDItEUR
Jack Tipping, Bowker
Howard Willows, Nielsen
Jon Windus, Nielsen (Chair)

Apologies

Kat Coveyduck, Virtusales
Peter Mathews, Cambridge University Press
Gabrielle Wallington, Waterstones (Deputy Chair)
Emma Watts, Hachette
Emma Whiting, Ingenta

1. **Introductions and Apologies**

   JW welcomed the Group to the meeting and delivered the apologies. CB of Canongate and LK of Penguin Random House (PRH) were welcomed as new members and it was noted that Alan Trewartha of HarperCollins Publishers and Laura Williams of PRH have now resigned from this Committee. With great sadness, LK informed the Group that Alfred Willmann (AW) of PRH passed away on Thursday 7th September 2017. The Group offered their sincere condolences. JW noted that AW made a huge contribution to the work of this Committee since its inception and will be sorely missed.

2. **Competition Law – Conduct Reminder**

   The Group was reminded about BIC's Competition Law Policy – please click on the following link for more information regarding this policy: http://www.bic.org.uk/149/BIC-Competition-Law-Policy/

3. **Review minutes and actions from the last meeting and any matters arising**

   The minutes from the previous meeting were approved with corrections from GB; the amended version was circulated to this Group on Thursday 3rd August 2017. The following actions were discussed:

   - Price & Availability (P&A) Terms Codes
     It was noted that GB attended the most recent meeting of the P&A Task & Finish Working Group (T&FWG), which took place on Thursday 31st August 2017, in order to discuss Terms Codes.

4. **Progress Report on the Metadata Supply Chain Map**

   JW provided a brief overview on the BIC Metadata Map project for the benefit of the Committee's new members. KL reported that the BIC Metadata Map Project Consultant Role Specification is now on the BIC website (here: http://www.bic.org.uk/files/Metadata%20Map%20Project%20Consultant%20Role%20Profile%20FINAL%20v1.2.pdf) and is being advertised on various websites and social

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media platforms. She noted that the application deadline is Saturday 30th September 2017 so the Project Consultant should begin work on this project by the end of December 2017, if not before. JW and KL noted that payment milestones will need to be agreed between the BIC Metadata Map Steering Group and Project Consultant in due course.

KL noted that the BIC Metadata Map Steering Group is self-governed and its members have suggested that additional representation from BDS and Nielsen Book would be beneficial. KL noted that the role of organisations in relation to this project, i.e. their level of contribution and what they will gain in return (in terms of their access to the Metadata Map), will need to be defined going forwards. JW noted that this Committee had suggested previously that organisations which do not contribute to the Metadata Map project should not gain access to the output at all. He suggested that this Committee should provide feedback on the Metadata Map contributor document going forwards, if required. KL noted that the key aim is to encourage engagement from a wide range of organisations to ensure the Metadata Map is as comprehensive as possible.

➢ **ACTION**: JW and EG to liaise with colleagues in order to identify a representative for the BIC Metadata Map Steering Group from each of their respective organisations.

Post-Meeting Update: EG of BDS and Howard Willows of Nielsen Book have now joined this Group.

5. **Library Pricing – the Information for Library Versions and Library Pricing in ONIX 3.0 document**
CS confirmed that this document was circulated to the Group on Wednesday 2nd August 2017. The Group did not have any feedback or issues to raise in relation to this document.

➢ **ACTION**: AMB to remove this item from the agenda for the next meeting of this Group.

6. **Personal pricing, terms codes, metadata to support returns processes**
KL noted that the BIC P&A T&FWG is now moving onto the second phase of its project: pricing. She reported that the Group's initial discussions have suggested that BIC Discount Group Codes (DGC) may not be flexible enough for the current book industry. A BIC workshop, Communicating Price Details in ONIX, took place on Wednesday 26th July 2017 to inform organisations about the options for expressing price that are already available in ONIX and to identify issues that are currently being experienced. KL thanked GB and CS for facilitating the workshop and reported that there are currently 4 ways to provide price details in metadata: Block 6 in ONIX 3.0, ONIX 2.1 or 2.1 P&A update messages, EDI messages (PRICAT), and EDItX messages.

KL reported that a survey has now been produced to establish how organisations communicate and receive information about trading terms, the responses to which will inform the forthcoming work of the P&A T&FWG; this survey will be disseminated to BIC Members on Friday 15th September 2017. GB noted that the P&A T&FWG feels strongly that BIC DGCs are important however it has suggested that establishing best practice and/or standards around the DGC matrix and a document explaining how to communicate trading terms securely to individual organisations would be useful. He noted that the recent workshop clearly showed that organisations need further guidance on which standards should be used for pricing and how; he suggested that the workshop could run again in 2017 for this reason. JB noted that there were a limited number of BIC P&A T&FWG members present at the BIC workshop in July 2017.

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> **ACTION**: AMB to liaise with GB offline regarding the proposed repeat of the BIC Communication Price Details in ONIX workshop in 2017.

Post-Meeting Update: this workshop will run again on Wednesday 23rd November 2017. More information can be found, here: http://www.bic.org.uk/159/BIC-Workshops/

- Proprietary Solutions

  JW asked whether the BIC P&A T&FWG has analysed proprietary solutions for sending personalised pricing information in order to understand their perceived advantages. GB noted that a spreadsheet-based solution may be suitable / viable for simple communications however it will not suffice for the dissemination of more complex or detailed information. He commented that the simplest possible supply update message (in each of the four or five existing standard methods) will need to be studied by the P&A T&FWG before concluding that the existing methods are 'overly complex'. JW suggested that a transition path to standard processes will also need to be agreed, and that any perceived advantages of proprietary solutions are addressed and reflected in any new best practice recommendation based on standards. The Group agreed that there should be a thorough investigation of the multiple, existing methods and of the requirements before any new 'solution' is considered.

  > **ACTION**: AMB to add an investigation of the multiple, existing methods and of the requirements for pricing to the agenda for the next meeting of the BIC P&A T&FWG.

7. **Updates from other BIC Committees**

   - Libraries Committee

     KL reported that the next meeting of the BIC Libraries Committee will take place on Thursday 21st September 2017. The Committee is looking to develop an EDI training course for libraries – a sponsor for which will need to be identified in due course. KL confirmed that the next BIC Library Suppliers (Libraries TaskForce) Liaison Group meeting will take place on Tuesday 17th October 2017.

     > **ACTION**: AMB to add an update on the BIC Library Web Services T&FWG to Item 8 of the agenda for the next meeting of the Metadata Sub-Committee.

   - Physical Supply Chain (PSC) Committee

     This Committee last met on Thursday 29th June 2017. KL reported that the physical supply chain is currently experiencing difficulties in relation to goods-in processes and the BIC PSC Committee is therefore looking to explore best practice in this area going forwards; this conversation came about in relation to Serial Shipping Container Codes (SSCCs) which the Committee agreed is out of scope for BIC as it is too commercially-sensitive. The Committee also stated at its last meeting that a date should not be agreed for the exclusion of retros from the Industry Returns Initiative (IRI) Rulebook since this is commercially-sensitive and should be discussed between trading partners. KL reported that GDPR is under discussion by the BIC PSC Committee – a presentation on which was provided at the BIC New Trends in Publishing Seminar on Tuesday 5th September 2017 – as well as the promotion of *BIC Realtime* APIs / web services; a *BIC Realtime* PlugFest which will take place on Tuesday 16th January 2018 to facilitate implementations.

8. **Update on progress for BIC Task & Finish Working Groups (T&FWGs)**

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- Acquisitions & Divestments (A&C)

  KL reported that the BIC A&C T&FWG's eBook Acquisitions document is in the final stages of production and the Group will now solely address physical / print acquisitions at its forthcoming meeting on Wednesday 8th November 2017.

- Price & Availability (P&A)

  See Item 6 (above). KL noted that the TRADACOMS List 54 document will be published soon.

- Product Data Excellence Award (PDEA) Accreditation Scheme Revision

  JT reported that this T&FWG last met on Thursday 3rd August 2017 in order to discuss the revised ONIX data element sets and PDEA Measurers / Assessors specification document; the deadline for feedback on these document is Friday 15th September 2017. JT noted that progress is being made on this project and the revised PDEA Scheme will launch in early 2018.

- BIC Supply Chain Excellence Award (SCEA) Accreditation Scheme Revision

  CM noted that she provided feedback on the recent BIC SCEA Accreditation Scheme survey. She raised concerns about how BIC will measure applicant organisations on certain criteria for the revised scheme. KL noted that further feedback on the SCEA Scheme will be sought from BIC Committees in due course, especially in relation to the standards that should be included.

  ➢ **ACTION**: KL and CM to liaise offline regarding Dorling Kindersley's feedback on the SCEA Scheme.

- Weights & Dimensions (W&D)

  KL confirmed that BIC W&D Sub-Group will next meet on Tuesday 12th September 2017 to identify how and why W&D issues are occurring in the supply chain. JW noted that there are huge discrepancies between the W&D of the product and the measurements included in metadata feeds. KL noted that the rate of compliance is very low indeed, with just 10% of organisations being compliant if tolerance levels are not applied and 50% being compliant if tolerance is applied. She commented that trimmed page size is often misinterpreted / conflated with the overall size of the product. GB noted that the crux of the issue relates to organisations' use of dummy figures (e.g. using negative figures, putting zero into the relevant ONIX fields, using the same measurements for all products, etc.) which leads to mistrust in the book industry supply chain – even if the measurements look reasonable.

9. **Update on the current Product Data Excellence Award (PDEA) Accreditation Scheme**

   KL noted that the PDEA results for July 2017 are now live on the BIC website – the announcement was delayed due to an unforeseen issue with Nielsen's new system. She reported that 48 publishers are currently accredited on the PDEA Scheme and 22 have obtained an ONIX 3.0 Badge.

10. **UK ONIX National Group**

    HW informed the Group that the next meeting of the UK ONIX National Group will take place on Wednesday 13th September 2017. GB reported that the online, multilingual browser for ONIX code lists which EDItEUR launched over the summer period has received a lot of interest to date; this browser can be found on the EDItEUR website, here: https://ns.editeur.org/onix. He noted that the

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browser runs on https:// for added security and privacy. He commented that the link (above) will always display a browser for the latest ONIX code list (currently Issue 38) but Issue 36 (the final code list which is relevant to ONIX 2.1 users) can also be found here: https://ns.editeur.org/onix36

GB reported that a series of "How To" Guides for ONIX – which focus on topics such as Sales Rights, W&D, Open Access Monographs, HTML Mark-Up, Audiobooks – have now been uploaded onto the EDItEUR website: http://www.editeur.org/93/release-3.0-downloads/#How_to. EDItEUR recently exchanged messages with Amazon regarding its advice to publishers when linking academic books to specific examination boards / exams / syllabuses; following this discussion, GB was pleased to report that Amazon has now amended its advice so that it is in-line with best practice. Discussions about ONIX 3.0.4 have already begun, with a rough target to release in Spring 2018 and a dozen proposals / changes have been put forward already. (The proposal paper has been circulated to the UK ONIX National Group for discussion.)

- BIC Workshops for ONIX
  GB noted that BIC held 2 workshops for ONIX in 2017 – one on HTML mark-up and the other on price. He encouraged the Group to put forward proposals / topics for BIC workshop in 2018 and suggested that sessions on subject classification and territorial sales rights may be beneficial. JB noted that almost all of HarperCollins' data recipients ask for its HTML metadata to be wrapped in CDATA. GB commented that the CDATA tag encapsulates HTML, stopping the feed from being invalidated regardless of whether it would validate or not. He suggested that organisations need to be better educated about best practice in this area since they often ask for CDATA as a precaution / short-term solution for bad metadata and need to learn how to ensure feeds validate instead. TG noted that Virtusales has to incorporate an extra layer of configuration into its system to counter / address this issue.
  ACTION: ALL to inform AMB the topics they would like an upcoming BIC workshop to focus on.

11. **UK *Thema* National Group**
    HW reported that the reverse mapping from *Thema* V1.2 to BIC 2.1 is now available via EDItEUR's website and BIC's Implementing *Thema* training course will take place next on Wednesday 18th October 2017. Further information is available, here: http://www.bic.org.uk/93/All-Other-Courses/

- *Thema* V1.3
  CS reported that the *Thema* V1.3 Working Group has now collated a list of proposals including new codes for Fiction and Education, and clarifications for existing codes which will help future translations. He noted that EDItEUR continues to add synonyms to the *Thema* browser (https://ns.editeur.org/thema/en) however they are not included in the documentation for *Thema* V1.3 as yet. GB noted that the target for release of *Thema* V1.3 is the end of this year.
  ➢ **ACTION**: ALL to submit suggestions / requests for new synonyms to CS and GB directly.

- Audience / Interest Age
  GB noted that Audience can already be expressed in ONIX and questioned whether it is necessary to include it in *Thema* V1.3 for this reason. He noted that allowing organisations to

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define their own age ranges in *Thema* could lead to misuse / result in overly wide age ranges (i.e. 3-12 years) that would be fundamentally useless for both retailers' and book buyers purposes. CS noted that EDItEUR has received requests for open age ranges, i.e. 13 years and upwards – which you can already do in both ONIX and *Thema*.

➢ **ACTION**: ALL to send any feedback or requirements for providing audience information via *Thema* to HW ASAP but especially in advance of Frankfurt Book Fair 2017.

- Cultural Interests
  HW reported that Shakespeare will be put forward for consideration as a UK 'Cultural Interest' code at the forthcoming *Thema* International Steering Committee meeting at Frankfurt Book Fair 2017. CS noted that the suggestions for this category need to be so significant to their region that they have their own stand / shelf in bookstores. It also has to be a subject that cannot be described by any other existing *Thema* code(s). Cultural Interest codes are not core codes but can be used globally, if required.

- *Thema* V1.2 Place Qualifiers and Education Qualifiers
  CS reported that the proposals for place qualifiers (for regions which don't currently have a *Thema* National Group) have been under consideration by an EDItEUR working group for several months, and will be reviewed at the forthcoming EDItEUR Steering Committee meeting; a handful of regions are considering their own requirements and have been left out of the current proposals document for this reason. GB noted that suggestions for new qualifiers are reviewed every quarter. CS reported that Germany and Spain now use *Thema* to classify educational books so each region has put forward its requirements. He suggested that the UK *Thema* National Group should consider whether *Thema* currently meets its own requirements for education in due course.

  ➢ **ACTION**: AMB to circulate information regarding the proposed *Thema* V1.2 place qualifiers and education qualifiers, ASAP. A 'preview' of the place qualifier proposals can be viewed here: https://ns.editeur.org/thema128

  ➢ **ACTION**: ALL to send their feedback on place qualifiers and education qualifiers (for Germany and Spain) to HW ASAP but especially in advance of Frankfurt Book Fair 2017.

12. EDItX Update

GB noted that EDItX formed the basis of (some of) the *BIC Realtime* APIs / web services. He noted that the EDItX sales reporting and invoice reporting formats are in the process of being revised, especially in relation to digital publishing, and the documentation radically improved. These revisions will be available by the end of 2017.

13. Round-the-table feedback from each committee member on new areas that this Committee should be exploring / researching

- JB noted that while publishers can state an audiobook file format in metadata (via ONIX), the file may be disseminated by retailers in a different format from the one supplied. He questioned who the metadata should be written for, i.e. retailers or end consumers, for this reason. GB commented that EDItEUR is in the process of adding a production block to ONIX in order to reduce / end the use of sidecar files however he noted that the file format should be agreed

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contractually between business partners. It was noted that PRH supplies both a MP3 and WAV file, when possible. AH noted that Faber & Faber supplies MP3s.

- ➢ **ACTION**: ALL to consider any repercussions / issues that may occur as a result of publishers specifying the format of an audio book in their metadata. Any examples of issues that arose as a result of supplying this metadata should be brought to the next meeting for discussion.
- ➢ **ACTION**: AMB to add this topic as an item on the agenda for the next meeting.

- LK noted that the sub-title field in ONIX continues to be misused by publishers. The Group agreed that this field often contains promotional blurb / edition numbers / etc. instead of the sub-title itself, and pressure is being applied internally (by editorial teams) to do so. LK noted that having a set of Best Practice Guidelines to refer organisations to would be of benefit, especially if the document contained statistics / the reasons not to misuse the sub-title field, i.e. it does not increase sales. GB noted that the correct way to add promotional text (instead of misusing the subtitle field) in ONIX 3.0 is using <TextContent> with <TextType> code 10 (promotional headline). KL noted that this text is used by Amazon. The Group agreed that BIC should issue a fresh message regarding best practice.
  - ➢ **ACTION**: KL to issue a reiteration of its position on this issue. BIC's statement should be clear about best practice in this area and the universality of its importance.

14. Actions for the BIC Training, Events and Communications (TEC) Committee to consider
AMB confirmed that the promotion of the revised TRADACOMS List 54 document (which has not yet been finalised / published) is on the agenda for the next meeting of the BIC TEC Committee.

15. A.O.B.
The Group did not have anything further to report.

16. Date of next meeting
Wednesday 13th December 2017.