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BIC PRODUCT DATA EXCELLENCE AWARD (PDEA) ACCREDITATION SCHEME REVIEW TASK & FINISH WORKING GROUP – Minutes

Location: Bowker's Office, 5th Floor, 3 Dorset Rise, London EC4Y 8EN

Date and time: Thursday 3rd August 2017, 2pm

Minutes taken by: Alaina-Marie Bassett

Present	Gabrielle Wallington, Waterstones
Alaina-Marie Bassett, BIC	Laura Williams, Penguin Random House
Graham Bell, EDItEUR	**Apologies**
Clive Herbert, Nielsen	Kat Coveyduck, Virtusales Publishing Solutions
Karina Luke, BIC	Nabiha Evans, Amazon
Alistair Mann, Hachette	Jon Green, Bertram's
Peter Mathews, Cambridge University Press	Will Harvey, Gardners
Cecilia Rushton, Hachette	Andrew Henty, Virtusales Publishing Solutions
Chris Saynor, EDItEUR	Kieron Smith, Blackwell's
Paul Theijs, BooksoniX	Keith Walters, Bibliographic Data Services
Jack Tipping, Bowker	Alfred Willman, Random House Group

1. **Introductions and apologies**

   The Group was welcomed to the meeting and the apologies were delivered. AM and CR of Hachette, CS of EDItEUR and WH of Gardners were welcomed to the Group as new members and it was noted that Thomas Herbert of Palgrave Macmillan and George Walkley of Hachette have now resigned. With great sadness, KL informed the Group that Judith Bennett (JB) of Oxford University Press passed away earlier this year. KL and the Group expressed their gratitude to JB for her contribution to the both this Group and to BIC over the years.

2. **Competition Law – Conduct Reminder**

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

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

   The actions from the last meeting of this Group were discussed as follows:

   - Prospective measurers / assessors for the revised PDEA Accreditation Scheme

     KL reported that CoreSource and Firebrand Technologies have expressed interest in measuring metadata for the revised PDEA Accreditation Scheme.
     - ➢ **ACTION**: KL to circulate the final Assessors Specification document to CoreSource, Vearsa and Firebrand Technologies for their consideration, ASAP.

   - CMBC codes

     KL confirmed that The Publishers Association uses CBMC codes in its reporting so they should remain a part of the PDEA Accreditation Scheme for this reason. CR noted that *Thema* does not

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incorporate CBMC codes at present. GB noted that CBMC codes are still in use and are therefore unlikely to be decommissioned any time soon.

- Cover images
KL noted that the agreed method / best practice for submitting cover images – i.e. via URL (recommended) or via FTP (only acceptable if required by metadata recipients) – will be included in the revised PDEA documentation. GW noted that the salient points should be included in the ONIX element data sets grid but suggested that a separate document should be produced to provide further / more detailed information, so as not to make the grid too unwieldly.
  - ➢ **ACTION CARRIED OVER**: ALL to ensure that the revised PDEA documentation states that cover images must be supplied within the same timeframe as format of the book.
  - ➢ **ACTION CARRIED OVER**: ALL to provide a note of best practice in the revised PDEA documentation regarding what constitutes an acceptable/unacceptable cover image.
  - ➢ **ACTION**: ALL to ensure that information about the agreed method for submitting cover images is included in the revised PDEA Accreditation and that a separate document containing more detailed information is produced in addition.

- eBooks
KL reported that the BIC Digital Supply Chain Committee is of the opinion that the timeframe for eBook timeliness on the revised PDEA Scheme should be the same as that for physical books (i.e. 16 weeks prior to publication date).

- Measuring tools for the revised PDEA Accreditation Scheme
JT noted that he cannot confirm whether Bowker will be able to implement a measuring tool into its system until the full specification has been signed off by this Group, disseminated to, and reviewed by, his colleagues in the US. He confirmed that Bowker is still interested in measuring metadata for the revised PDEA Accreditation Scheme however.
  - ➢ **ACTION CARRIED OVER**: CH, KW and JT to liaise regarding the implementation of a measuring tool for BDS and Bowker's respective systems, once the specification document has been finalised.
  - ➢ **ACTION CARRIED OVER**: Once the specification document has been finalised, CH to liaise with Nielsen regarding their ability to measure all descriptions for the purpose of the revised PDEA Accreditation Scheme.

- Additional question for the revised PDEA Application Form
  - ➢ **ACTION CARRIED OVER**: KL to ensure that the revised PDEA application form states that organisations which do not supply a delta feed at least once every 6 months are not eligible to gain accreditation.

- <RelatedProduct> composite
GW reported that the BIC Price & Availability (P&A) Task & Finish Working Group (T&FWG) has not, to date, identified a way to state more than one relationship in P&A feeds using this composite. The T&FWG will discuss this topic again at a forthcoming meeting.

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- **ONGOING ACTION**: GW to discuss this topic at the forthcoming meeting of the P&A T&FWG.
- **ACTION**: AMB to add "expressing more than one relationship in P&A feeds using the <RelatedProduct> composite" to the agenda for the next meeting of the P&A T&FWG.

- PDEA Sub-Group / Breakout Sessions
GB noted that the revised PDEA Accreditation Scheme has been simplified, resulting in 3 levels of accreditation – each of which is connected to a specific data element set. He noted that this T&FWG will need to ensure that the requirements for each tier of accreditation are clear since they differ in some respects, i.e. the percentage of timeliness. GB and KL agreed that both POD products and eBooks should be treated the same as print books in relation timeliness, i.e. 16 weeks prior to publication date. KL noted that the terminology of the PDEA Scheme has also been revised and simplified so the name of the data element sets are not conflated with the name of each award; such as BIC Basic. CR noted that it will now be much easier to communicate information about the PDEA Scheme and engage in-house colleagues.

- Backlist / Lazarus titles
GB noted that Fraser Tanner of The Booksellers Association and Batch confirmed that retailers need to receive metadata for backlist titles a minimum of 16 weeks prior to publication date.

- eBook pricing
KL informed the Group that some publishers are concerned about sending commercially sensitive eBook pricing to data aggregators because this information might be inadvertently disseminated across the book industry supply chain. GB noted that a List Price is required for this reason since it would not convey discounted prices for specific retailers and is not therefore commercially sensitive. LW agreed. GB noted that List price can be disseminated with a series of relevant discount codes, should the publisher choose to do so. KL noted that some publishers do not use discount codes so only List Price should be mandatory for the revised PDEA Scheme. GB suggested that this Group should discuss the "please enquire direct for price information" ONIX code further as it is clearly not expressing a price. CS, PM, PT and JT agreed that the use of this code by organisations is very minimal indeed. CS noted that it is used only when a publisher has a number of List Prices for different regions; the currencies for which are affected by exchange rates on a daily basis. CS and GB agreed that this practice should not be encouraged since Price Status can be used to express that a price may fluctuate / increase. GB suggested that "not Firm Sale" is acceptable for lower tiers of PDEA Accreditation however.

- Measuring eBooks
KL asked whether a separate document should be produced for eBook metadata requirements which are separate / in addition to the requirements of the PDEA Scheme for print books.

4. **Update on the revised ONIX data element sets**
- Terminology
GB suggested that there is more work to be done on the PDEA Scheme documentation in relation to the terminology used, i.e. mandatory, required, expected, recommended, etc. He noted that this

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Group will need to determine how to present items that are 'required' but only when applicable; only the definitions for 'required' and 'expected' have been agreed to date. LW suggested that a column could be incorporated into the ONIX data element sets grid for digital products so that it is clear which product each data element set applies to however GB noted that a number of columns would be required if this layout is chosen. CH suggested that the ONIX data element sets document should begin instead with a glossary or key for the terminology used throughout the grid.

GW commented that 'expected' may not be a correct term for the revised PDEA Accreditation Scheme. GB suggested that 'mandatory', 'mandatory with conditions' and 'recommended' may suit this Scheme better; where 'mandatory' and 'mandatory with conditions' labels are supplied for the purpose of the PDEA assessors / measurers and the 'recommended' label provides further information to applicants about best practice. The Group agreed.

➢ **ACTION CARRIED OVER**: KL to ensure that a glossary is included in the documentation for the revised PDEA Scheme, outlining which is measured / not measured / conditional, etc.

- General points about the revised PDEA Scheme
GB suggested that this Group should review the ONIX data element sets outside of this meeting in order to provide detailed feedback however the following items were noted:
- Data Format must be supplied in ONIX-compatible language and meet ONIX requirements even if ONIX is not being used by organisations to disseminate their metadata
- Organisations do not have to use ONIX in order to achieve a BIC PDEA Bronze award
- Organisations must use ONIX (i.e. 2.1 or 3.0) in order to obtain a BIC PDEA Silver award
- Organisations must use ONIX 3.0 and *Thema* in order to obtain a BIC PDEA Gold award

- Product Identifier / Retailer Exclusives
GB noted the supply of either an ISBN or GTIN-13 is required for the revised PDEA Scheme. PT noted that some organisations which sell eBooks via online retailers (such as Amazon) or offer retailer-exclusive products do not provide product identifiers. As such, CS asked whether these products may be out of scope for the revised PDEA Accreditation Scheme. KL noted that page 2 of the PDEA Assessors Specification states that publishers must ensure that their metadata clearly shows if an ISBN is for a retailer-exclusive product and if so, which retailer it is associated with. GB acknowledged that it may not be necessary for retailer-exclusive titles to be measured as a part of the revised PDEA Scheme however he noted that, even in a closed ecology, BIC should encourage best practice, i.e. the use of ISBNs and encouraging publishers to send metadata for their entire product range. He also noted that data aggregators, such as Nielsen and Bowker, cannot measure metadata that does not include ISBNs.

LW noted that publishers often have non-standard relationships / processes in place with third party organisations however the metadata that is disseminated more widely (i.e. beyond those third parties) will be standardised. She suggested that the metadata which is submitted to individual third parties should not be measured as part of the revised PDEA Accreditation Scheme (providing the widely disseminated metadata is correct and above board) because it does not affect the rest of the book industry supply chain. KL noted that the PDEA Accreditation Scheme cannot make allowances for organisations that cannot afford to assign an ISBN to each

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of their products. LW noted that insisting on the use of ISBNs as a part of the PDEA Accreditation Scheme may discourage some organisations from applying (due to the cost of ISBNs). CS noted however that by not using an ISBN, organisations are forcing consumers to purchase a book from a single platform which is not best practice. CR commented that she would be concerned about disseminating metadata for Hachette's retailer-exclusive products for the PDEA Scheme.

- <u>ISBN required on the PDEA Scheme</u>
  KL noted that the fundamental purpose of the PDEA Scheme is to improve metadata across the book industry supply chain and if this Group allows ISBNs to be left out of metadata feeds, it will be diluting the Scheme. She asked whether it would be difficult for the PDEA Accreditation Panel to ascertain if metadata about retailer-exclusive products has been left out of publishers' full metadata feeds. GB and GW noted that an ISBN has always been a requirement for the PDEA Accreditation Scheme to date, even for the lowest tier of accreditation. GB suggested that, if the volume of retailer-exclusive products exceeds a certain percentage (which would be agreed in due course) of a publisher's catalogue and therefore affects the publisher's PDEA award detrimentally, this fact could be taken into account by the PDEA Accreditation Panel and discussed on an individual basis; a notification from the publisher would be required in order to begin this discussion.

- <u>The revised PDEA Application Form</u>
  KL suggested that a question should be added to the PDEA Application Form asking organisations to state whether their full metadata feed includes all titles in its catalogue and if not, what is missing and the volume of titles. GW noted that while encouraging best practice, this Scheme should also facilitate modern trade processes wherever possible. She suggested that organisations should not be required to send records for variations of the same products that are simply sold through multiple sales channels. PM agreed, noting that Cambridge University Press sends all metadata for its print books but not its digital products due to the number of variations – some of which are relevant to specific third parties only. CH noted that data aggregators do not need to receive multiple records for the same product in this way.

- <u>Exceptions</u>
  KL noted that objective guidelines for exceptions, which the PDEA Accreditation Panel will administer and uphold, should be agreed by this Group. LW noted that it is not in publishers' interests to withhold information or provide limited records about their products since the PDEA Accreditation Scheme is a great way to receive feedback on their metadata feeds. PT noted that metadata which is provided for the general trade is often good metadata but does not include an ISBN due to the retailers' product record requirements. He suggested that it would be unfair to mark a publisher down as a result of this. CR suggested for this reason that organisations should only be judged on metadata that is disseminated to the wider trade. GB reminded the Group that it had strongly suggested (previously) that publishers should be measured on their whole catalogue however this decision can be revised.

- <u>GTIN-13</u>
  GB noted that the amendment of Product Identifier for the revised PDEA Accreditation Scheme

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to include GTIN-13 allows non-book products to be measured as a part of the Scheme. LW commented however that the metadata for these products will understandably contain limited fields because many will not be relevant to the product type, i.e. page count for umbrellas. KL noted that out of scope data element sets are listed in the PDEA Assessors Specification, and confirmed that the PDEA Accreditation Panel will only measure products that are available in / sold into the UK. GB asked which regions are included in the UK for the purpose of this Scheme, i.e. Guernsey, Jersey Northern Ireland, etc. The Group agreed that all of the regions should be listed out in the revised PDEA documentation to ensure clarity.

❖ **DECISION**: The Group agreed that it is not necessary for publishers to disseminate multiple metadata records for retailer-exclusive products however they should provide information in their application forms to explain what products (if any) are not being included in their metadata feeds to assessors / aggregators and why.

- <u>PDEA Accreditation for organisations outside of the UK</u>
CS asked whether organisations outside of the UK are able to gain accreditation on the PDEA Scheme. GW and KL confirmed that BIC has approached organisations to do just that over the past few years – providing their products are available in the UK. GW noted that airside editions have a short life span however their metadata needs to be correct in order to facilitate sales and should therefore also be included in the PDEA Scheme going forwards.

- <u>Contributor</u>
GB noted that in order to obtain a Bronze award on the revised PDEA Accreditation Scheme, publishers must provide Contributor Roles in separate fields / columns. For the Silver and Gold awards however, publishers must state what sequence multiple contributors are in. GB noted that the inclusion of ISNIs is recommended and that Corporate Name should be incorporated into both the Bronze and Silver awards going forwards.

➢ **ACTION**: GB to send the revised ONIX data element sets document to AMB for circulation, ASAP.
➢ **ACTION**: ALL to provide feedback on the revised ONIX data element sets spreadsheet by Friday 15th September 2017, sending this information to KL and AMB for collation.
➢ **ACTION**: GB, CS, KL and AMB to liaise in order to discuss and collate the feedback received after Friday 15th September 2017 and prior to the next meeting of this Group.

5. **A.O.B**
KL noted that this Group will need to announce the revised PDEA Accreditation Scheme and agree how to transition from the original to the revised scheme and revised Assessors Specification ASAP. GB noted that there are a few additions in the revised Scheme that organisations must use / include in their feeds going forwards in order to retain their BIC Excellence Plus / Gold award, e.g. *Thema*, ONIX 3.0, content warnings (when applicable), etc. He suggested that providing publishers with a year's warning about these additions should be sufficient. The Group agreed.

6. **Date of next meeting**
The Sub-Group meeting referred to in Item 4 (above) will take place on Thursday 9th November 2017.

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