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## BIC PRODUCT DATA EXCELLENCE AWARD (PDEA) REVIEW WORKSHOP – #2

Premier Meeting Rooms, London Victoria, 82-83 Eccleston Square, London SW1V 1PS
Thursday 10<sup>th</sup> December 2015, 10am–4pm

| Present | Apologies |
|---|---|
| Alaina-Marie Bassett, BIC | Jenny Brownley, WHSmith's |
| Graham Bell, EDItEUR | Thomas Herbert, Palgrave Macmillan |
| Judith Bennett, Oxford University Press | Kieron Smith, Blackwell's |
| Nabiha Evans, Amazon | Gabrielle Wallington, Waterstones |
| John Green, Bertram's | Keith Walters, Bibliographic Data Services |
| Clive Herbert, Nielsen | Alfred Willman, Random House Group |
| Alex Ingram, EDItEUR | |
| Karina Luke, BIC | |
| Peter Mathews, Cambridge University Press | |
| Paul Theijs, BooksoniX | |
| Jack Tipping, Bowker  (Chair) | |
| George Walkley, Hachette | |
| Laura Williams, Penguin Random House | |

1. **Welcome & apologies**

   KL welcomed the Group to the workshop, thanking them for attending this second PDEA Review workshop. The apologies were read out.

2. **Review of the minutes and actions from the last workshop**

   The minutes from the last PDEA Review Workshop, which took place on Wednesday 30<sup>th</sup> September 2015, were approved with minor corrections from GB. AB confirmed that the minutes were corrected and the amended version was circulated to the Group on Monday 30<sup>th</sup> November 2015. The following actions from the previous workshop were discussed:

   - Jacket  / Cover Images

     CH updated the Group on the current PDEA Accreditation Scheme's requirements for cover images. He confirmed that cover images submitted via a URL are included in the timeliness calculation and therefore need to be submitted at least 16 weeks prior to the publication date. Cover images that are submitted as a file type (i.e. jpeg, PNG, etc.) must simply be submitted before publication date and are not included in the organisation's timeliness statistics. PM explained the historical reason for this decision, noting that cover images are a mandatory BIC Basic requirement whereas cover images submitted via URLs can only be delivered by ONIX and as such, the latter must be compliant with, and sent within, the '16 weeks prior to publication' deadline.

     LW commented that publishers prefer to send images via URL because they take up less storage space and it is possible to reliably update the image. JT noted that Bowker does not currently accept URLs for the submission of cover images. KL asked the Group what

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they would like for the future. AI informed the Group that the ONIX specification states that URLs should be used to submit cover images; he suggested that the wording of this document may need to be amended, depending on the decision of this Group. GB noted that retailers need to receive cover images in the same timeframe (i.e. within 16 weeks of the publication date) as the rest of the book's metadata – he suggested that the method of delivery is not an issue for this reason. The Group agreed that the timeliness of cover images should be measured regardless of the delivery method.

- Summary of Measures
  KL informed the Group that she has now amended the Summary of Measures grid, removing all of the references to 'N/A'. She circulated copies of the amended document to the Group during the workshop.

- ONIX Release 3.0 grid
  KL noted that the ONIX 3.0 grid will be reviewed under the corresponding item on this agenda; alongside AI's comments / amends. See Item 4.

- Measuring the timeliness of eBook metadata on a different timeframe
  CL confirmed that it is possible to measure eBook metadata on a different timeframe to physical books' metadata; i.e. 4 weeks prior to publication rather than the 16 weeks prior to publication date deadline that physical books need to comply with. He noted that this Group will need to decide what should be measured in relation to eBooks.
  **ACTION**: KL to include this discussion as an item on the agenda of the next PDEA Review Workshop (#3).

- Identifying Print On Demand (POD) titles on the revised PDEA Accreditation Scheme
  The Group were informed that, since the last meeting of this Group, GB produced a document outlining the options for identifying POD titles on the revised PDEA Accreditation Scheme. KL noted that members of BIC's POD & Short Run Task & Finish Working Group (T&FWG) want, if possible, to eliminate 'POD' as a term going forwards; they intend to find another way to express this manufacture method so that the new term doesn't have the historically negative connotations of POD attributed to it.

  GB proposed a new term for 'Code 12 – not yet available, will be POD', amending the definition to 'Manufactured on Demand'. He suggested that there is no need to identify POD titles unless the time of manufacture, and so availability to the customer, is longer than that of other books. He advised that publishers should use <ProductStatus> in ONIX 3.0, rather than tags in ONIX 2.1. KL commented that neither the terms of a book nor its method of manufacture should be attempted to be described by using availability codes. GB noted that the stigma surrounding POD stems mainly from quality issues that were apparent in the past; the quality of POD books has since been bettered but the stigma remains.

  PM commented that information about the manufacture of a book does not need to be passed down the entire supply chain and, as such, end-users should not be privy to the

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manufacture method of a book; he suggested that they should instead see only codes for 'available' or 'not available' respectively. The Group agreed but noted that some titles will inevitably have a longer manufacture time and a code is therefore needed to express this, to ensure that customers are well-informed throughout the order process. They agreed that, for this reason, 'Code 12 – Manufactured on Demand' should not be deprecated; instead, its appropriate use should be expanded on.

The Group agreed that the PDEA Accreditation Scheme should recommend that POD books which can be supplied in the same timeframe as traditionally-printed books should be tagged as 'Available'. Only books that cannot be produced within that timeframe should be marked as 'Code 12 – Manufactured on Demand'. ONIX is an international standard and as such it was noted that this recommendation may not necessarily be adopted globally.

The Group discussed this decision in relation to Amazon. GB commented that Amazon needs to know when it will receive stock of a book. KL agreed, noting that retailers only need to know the delivery time for this reason, and not the manufacture method. NE agreed, stating that Amazon have records for titles that are manufactured on demand by Amazon itself, but they are unlikely to need to know the manufacture method of POD titles that are produced externally. She agreed to check this with her colleagues at Amazon and report back to the Group at the next workshop. KL encouraged the attendees of this Workshop to participate in the POD & Short Run T&FWG going forwards.

**ACTION**: NE to liaise with her colleagues at Amazon to ascertain whether there is a need to know how a book is manufactured outside of Amazon and report back to the Group.

**ACTION**: ALL to contact KL / AMB if they would like to join the POD & Short Run T&FWG.

- Bowker's & Bibliographic Data Services' (BDS) ability to measure ONIX files for the revised PDEA Accreditation Scheme's higher levels of accreditation

CH confirmed that Nielsen would be happy for Bowker, BDS and any other data aggregators to provide statistics for the revised PDEA Accreditation Scheme. He suggested that a new model for measuring metadata would be beneficial. KL informed the Group that Virtusales Publishing Solutions have suggested that they would be interested in joining the PDEA Revision T&FWG and also the PDEA Accreditation Panel going forwards.

At the last meeting of this Group, KL suggested that Nielsen could perhaps be set up as a 'customer' by publishers submitting eBook metadata to Coresource / Vearsa in order to enable them (Nielsen) to receive a scaled down eBook metadata set (which would exclude commercially sensitive information) from CoreSource / Vearsa, etc. However, this would be a publisher decision.

**ACTION**: KL to follow-up with CoreSource and Vearsa to ask whether they might be willing to join the PDEA Revision T&FWG and PDEA Accreditation Panel going forwards.

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- ONIX 3.0 Tick / Badge
KL informed the Group that AMB will be shortly begin approaching all organisations that are currently accredited on the PDEA Accreditation Scheme regarding the new ONIX 3.0 Tick / Badge. Organisations that are sending a live ONIX 3.0 feed to at least one UK data aggregator will be awarded their ONIX 3.0 Tick / Badge at January's PDEA Accreditation Panel meeting.
**ACTION**: AMB to approach all organisations that are currently accredited on the PDEA Accreditation Scheme regarding the new ONIX 3.0 Tick / Badge.

- Age Range
NE reported that Amazon do not currently accept age range information from publishers, instead Amazon uses a combination of components, including (primarily) BIC codes to work out the age range for a book. GB commented that BISAC does not have a way to express age ranges and asked how Amazon therefore work out this information for the US market. NE suggested that, in all likelihood, age ranges in the US are worked out using the <AudienceRange> composite.

3. **Summary of what was agreed at the last PDEA Review Workshop (#1)**
KL circulated a document to this Group, prior to this meeting, which listed what was agreed at the last PDEA Review Workshop. The Group read through this list during the meeting and the following points were raised for discussion:

- POD titles
GB asked whether it is necessary to submit information for POD titles within the same timeframe as traditionally-printed books, i.e. 16 weeks before publication date. KL noted that the timeliness of POD books will not be measured under this model. GB suggested that timeliness of POD books should be measured but within a shorter timeframe, i.e. 4 weeks before publication date; the timeframe under which eBooks will be measured on the revised PDEA Accreditation Scheme. NE noted that there is very little reason for POD books not to be available as soon as the metadata for the book is received. LW agreed, noting that there tends to be very little publicity around POD titles in the trade sector. GB suggested that, although there may not be a demand for POD titles, it may not be best practice to make POD titles available instantly.

KL asked if publishers ever need to market POD books prior to their publication dates / set up pre-orders for them. PM confirmed that pre-orders are necessary for well-known academic books (i.e. new editions), though he suggested that publishers should not be penalised if they choose to make their POD title available on the publication date, itself. LW agreed, noting that the '16 weeks prior to publication date' deadline for print books is a product of the book industry's print cycle which does not affect POD titles in the same way. GB also noted that, especially for academic publishers, POD titles do not necessarily equate to lower profile books. In addition, the Group agreed that not all retailers are able to upload the metadata they receive online overnight. PM suggested that '4 weeks prior to publication date' is an easier message to get across to publishers.

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**ACTION**: KL to liaise with GW of Waterstones to receive feedback on this Group's discussion about a suitable timeframe for POD titles prior to the next meeting.

- Sending metadata feeds to at least 3 UK data aggregators (Nielsen, BDS & Bowker)
KL asked the Group whether it is necessary to specify the frequency / amount of updates that publishers provide. LW suggested that this would not be necessary for small publishers since they may not have many / any changes to notify their customers about; the effort to send out an additional feed for the purpose of the PDEA Accreditation Scheme would therefore be unwarranted. GB informed the Group that it is possible in ONIX 3.0 for publishers to state that there are no changes to report. JT confirmed that Bowker would be interested in receiving this notification from publishers. JB commented that it would be beneficial for Oxford University Press to receive a full feed from every publisher they deal with on a yearly basis. JT agreed, noting that Bowker request a full feed from their customers at least once a year.

GB noted that the most important aspect of this process is to ensure that the disseminated metadata is correct, rather than the amount of updates sent. KL noted that the frequency of updates is not measurable on the PDEA Accreditation Scheme but a recommendation may be appropriate. PT agreed but informed the Group that some data recipients complain if they receive too many updates on a regular basis, since they may not have the capacity to process the updates.

GB suggested that feeds should be sent out by publishers a minimum of once a year, regardless of the size of the publisher or the amount of books published by them. However, he recommended that larger organisations should send an update out on a monthly if not weekly basis, depending on the size of the publisher.  NE informed the Group that Amazon do not want to receive full feeds. The Group agreed that publishers should provide a full feed on request but provide updates on a monthly basis as a minimum requirement.

- ONIX 3.0 (using the enhanced data set) to become a requirement for BIC Excellence Plus award a year from the launch of the revised PDEA Accreditation Scheme
GB raised his concerns about the time frame cited in this decision, noting that organisations will effectively be given 18 month's grace to implement ONIX 3.0 after the launch of the revised accreditation scheme – 12 months after the launch of the new scheme plus a further 6 months (maximum) via deferrals; he suggested that this is too much time and will not encourage organisations to migrate to ONIX 3.0, if they haven't already done so. NE noted that the Group had initially decided on the 12-month migration timeframe (excluding deferrals) because there is not a compelling business case for publishers to migrate to ONIX 3.0 currently. GB disagreed, noting that support for ONIX 2.1 has already been twilighted and as a result publishers' plans to migrate to ONIX3.0 need to be maintained and encouraged as much as possible.

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PM noted that publishers that do not migrate to ONIX 3.0 within the allotted timeframe will simply be reaccredited at a lower level, i.e. BIC Basic or BIC Excellence; they will not necessarily lose their accreditation fully (assuming the quality of the metadata remains good). He suggested that this requirement will form an incentive for publishers to migrate to ONIX 3.0. AB reported that many of the publishers that are currently accredited at the BIC Excellence Plus standard have already migrated to ONIX 3.0 or are currently testing their ONIX 3.0.

The Group agreed that the deadline to migrate to ONIX 3.0 should be 6 months from the launch date of the revised PDEA Accreditation Scheme, with a further 6-month deferral period, should it be necessary; totalling a maximum of one year's grace. They also agreed that organisations will only be eligible to defer if they have already begun testing their ONIX 3.0 feed prior to the initial 6-month period notice period. Organisations that have not begun testing during this initial 6 month notice period and/or are not live with ONIX3.0 by the time their accreditation renewal comes up  will simply be demoted to a BIC Basic / BIC Excellence award, as appropriate. This decision means that, by 2017, every organisation that holds a BIC Excellence Plus award will be using the enhanced data set of ONIX 3.0.

**ACTION**: KL to amend the 'Summary of what was agreed at the last PDEA Workshop' document to reflect the above discussion: 6-month deadline, rather than 12 months.

KL noted that it will be necessary, in the distant future, for the PDEA Accreditation Panel to discuss how the BIC Basic and BIC Excellence awards should be amended to incorporate ONIX 3.0.

- *Thema* as a non-mandatory data element on all levels of accreditation
  GB commented that 5 years is too long to recommend *Thema* as a non-mandatory requirement for the PDEA Accreditation Scheme. He suggested that the demand for *Thema* will be driven by retailers. NE commented that Amazon will request *Thema* but non-exclusively since they will still accept both BISAC and BIC codes too.
  **ACTION**: AMB to add this topic as an item on the agenda of the next meeting for the UK *Thema* National Group.
  *Post-Meeting Update: The UK* Thema *National Group suggested that they will collectively need to agree when the time is right to make* Thema *a mandatory requirement of the PDEA Accreditation Scheme; at this time, they will then need to send their recommendation to the PDEA Accreditation Panel and Metadata Sub-Committee for consideration.*

- eBook Metadata to be sent to at least 1 UK data aggregator for measuring
  GB asked whether all of the data received by one or more of the UK's data aggregators will be collated in order for it to be measured. KL suggested that this would be possible but noted that the commercial information included in the feed would need to be stripped out before collating it / circulating it to the rest of the aggregators. GB noted that the wording of this requirement will need to state that all information (i.e. the

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organisation's whole eBook feed) must be sent to at least one UK data aggregator so that it can be measured.

KL noted that the members of the PDEA Review T&FWG want to allay organisations' fears / concerns about sending eBook metadata to data aggregators. She suggested that the dissemination of each organisation's metadata excluding commercials will have this effect. GW agreed, noting that organisations fear their commercial sensitive metadata being disseminated widely since it cannot easily be traced within the book industry supply chain after being sent out. She noted that most organisations will be happy to send a stripped down feed for accreditation purposes but, if the feed is to be disseminated more widely, they would want to know where it will be sent to. LW noted that Penguin Random House would not send their eBook metadata to organisations that cannot / will not use it for trade, since there would be little point in those organisations receiving the feed. GW commented that this, in itself, can cause issues since some organisations require an eBook feed in order to decide whether to do business with the publisher.

LW asked how the PDEA Accreditation Panel will know whether the publisher's entire feed has been disseminated. CH agreed that this could be difficult to ascertain and the Panel will only be able to accredit each organisation based on the metadata that they send out. LW suggested that it does not make sense to penalise publishers / insist that they send their eBook metadata to aggregators purely for accreditation purposes if they are already sending it to the organisations that need it / use it. KL agreed, noting that she will follow-up her conversation with CoreSource about their ability to measure eBook metadata in accordance with the accreditation scheme requirements and sitting on the PDEA Panel going forward.

KL also suggested that Nielsen could be set up as a 'customer' of each of the applicant organisations so that Nielsen receives each organisation's eBook metadata, exclusive of commercial detail, and can measure it accordingly for the purpose of the PDEA Accreditation Scheme. LW noted that publishers' concerns about this possibility will come down to the way in which the data is used. KL suggested that a conversation needs to take place between the PDEA Accreditation Panel and digital content asset management organisations, such as CoreSource, in order for an overall statistic to be reached. GB reasoned that the eBook metadata therefore needs to be sent to an organisation that has the capacity to measure it. The Group agreed that all of the recognised UK data aggregators (i.e. Nielsen, Bowker & BDS, to date) will need to pool their information to attain a final statistic for each organisation as part of the revised PDEA Scheme.

- Keywords
AI noted that the use of keywords is advised but not mandatory in order to achieve a BIC Excellence or BIC Excellence Plus award.

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- Replacing EAN-13 with GTIN-13 within the BIC Basic requirements table
GB commented that this change is just a matter of terminology. AI confirmed that the requirement is worded well in the ONIX 3.0 grid, which applicants can refer to.

- Guidelines / clarity needed with regards to P&A feeds in the PDEA Accreditation Scheme
KL suggested that the documentation for the revised PDEA Accreditation Scheme needs to include information about Price & Availability (P&A) feeds. CH suggested that the relevant information could be incorporated into the application form for the revised PDEA Scheme. GB noted that, in some instances, the information provided by publishers and distributors respectively can conflict and the data aggregators will therefore need a way to know which feed to trust. LW suggested that the applicant publisher should specify which of the sources to use / trust on the PDEA application form. KL agreed, noting that if the third party (i.e. the distributor) is given the responsibility for the P&A feed and the publisher fails their accreditation as a result, the publisher will need to accept this, and liaise directly with the distributor to discuss this. CH confirmed that all of the above is possible but he suggested that he will need to discuss this matter with his colleagues at Nielsen to see how long the adjustments to the Scheme would take.
**ACTION**: CH to liaise with his colleagues at Nielsen to ascertain the timescale for this Group's suggested adjustments (so far) to be implemented into the PDEA Accreditation Scheme.

4. **Review of the PDEA Accreditation Scheme's data element sets**

- BIC Basic
KL summarised what was agreed at the last PDEA Review Workshop regarding the BIC Basic data element set. The following requirements were discussed:

   • Author
   GB noted that it is possible to add a column to a flat file for author information to be included (or to provide a positive indication that there is no author) within a feed. CH agreed that the inclusion of 'author' as a BIC Basic requirement would not affect many, if any, organisations adversely; especially not those using web tools. The Group agreed that 'Author' should be amended to 'Contributor Information' and this should be added as a mandatory requirement of the BIC Basic award going forwards. GB noted that this inclusion will make the BIC Basic award more measurable.

   • Series / Collection
   PM suggested adding 'Series Editor' to the BIC Basic data element set grid but the Group agreed that this information should be provided under 'Contributor Information' (see 'Author' above).

   • Edition
   AI suggested that a reduction for edition (i.e. EDN) is not necessary in the documentation for the PDEA Accreditation Scheme. GB noted that the

*The book industry's supply chain organisation*

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documentation should specify the format of the edition number – a digit rather than the number in written form – e.g. '2' not 'two'. The Group agreed.

- Product Form
  PM noted that this Group can only form a recommendation for multiple media products. LW suggested that organisations should be recommended to use the controlled vocabulary of ONIX (from List 510) to remain consistent in their expression.

- Product Properties
  GW suggested that 'word count' could be used here instead of 'running time' (for audio products) and 'number of pages' (for all other formats). LW commented that Penguin's customers often request a notional page count, even for digital products – despite the fact that reflow can change this figure exponentially. JG suggested that the depth and weight of a book should be added to the list too. The Group agreed. All of the above should be included on the revised PDEA Scheme as recommendations only. NE asked why it is not mandatory to provide information about a product's properties. The Group noted that this decision is due to the fact that many organisations may not know the book's dimensions, etc. 16 weeks prior to the publication date.

  GB suggested that 'spine width (depth)' should be used instead of 'depth'. KL noted that the weight of the book should be specified by publishers in grams. AI suggested that 'if known' should be amended to 'as soon as known'. JG commented that the dimensions provided need to be as accurate as possible. GB agreed, noting that EDItEUR's guidelines state that the dimensions should be correct within 1-2mm; however, he suggested that this stipulation may not be necessary for BIC Basic. NE noted that 'running time' in the film industry is often specified in minutes, the Group agreed that this should be reflected in the recommendations for BIC Basic. They also agreed that 'main language' should be mandatory and should be expressed in the controlled vocabulary of ONIX Codelist 74. GB noted that only the Language Code itself should be included in the feed.

- Audience / Content Warning
  NE commented that it would be beneficial for publishers to provide information about the audience of a book; especially for titles that contain adult content. GB suggested that publishers could either notify their customers if a book contains adult content or provide age ranges / audience for their books. NE suggested that notification of adult content is more important than the submission of age ranges. GB noted that organisations should use ONIX Codelist 203 to express their content warnings in a controlled vocabulary. The Group agreed that a 'Content Warning' should be a conditional, mandatory requirement for adult books, i.e. a Content Warning must be provided for any <u>adult</u> book. LW noted that titles listed as '00 –

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unrated' are often disregarded by retailers and as such this will incentivise publishers to provide an appropriate notification of the book's content.

The Group agreed that 'Audience' should also be a mandatory requirement in the PDEA Scheme and should be expressed using the controlled vocabulary of ONIX Codelist 28. KL asked whether organisations that do not use the outlined controlled vocabulary should be penalised on the PDEA Accreditation Scheme, the Group confirmed that this should be the case since a standardised response is required for the information to be used by all. CH noted that the use of List 28 will make the BIC Basic award more measurable. The Group noted that it may take time for smaller organisations to implement this into their system. KL suggested that the applicants of the PDEA Accreditation Scheme will be given 6 months in which to implement the use of this controlled vocabulary into their system, after the launch of the scheme, and they will also have the option to defer for (up to) a further 6 months after this initial 6-month period has expired, if necessary.

PT asked what publishers should do if a book has multiple audiences. GB noted that the process is repeatable in ONIX so that multiple codes can be assigned.

- BIC Subject Classification
  AI suggested that publishers should be encouraged to provide *Thema* codes in the revised PDEA Scheme; he suggested adding a separate, non-mandatory requirement for *Thema* – which the Group agreed to. NE also suggested adding a non-mandatory requirement for publishers to supply BISAC codes however the Group agreed that, as a UK-orientated accreditation scheme, it is not appropriate for BIC to recommend supplying BISAC codes. The Group noted that an increase in the adoption of *Thema* will put an end to supplying a variety of countries' subject classification codes. LW commented that applicant organisations will need to be made aware of the fact that a main code and supplementary qualifiers are required.

  CH asked whether a CBMC code should be a conditional requirement of the BIC Basic award, providing the title is a children's book. He noted that CBMC codes are a requirement of both the BIC Excellence and Excellence Plus awards on the current PDEA Accreditation Scheme. GB also noted that supplying a CBMC code is strongly recommended by The Publishers Association (PA). LW asked how widely CBMC codes are used throughout the book industry and whether it would affect retailers if this information was not supplied. GB confirmed that it would affect market figures. The Group suggested that BIC should liaise with The PA to see how much value the CBMC statistics have in today's market. GB noted that there must have been value to supplying CBMCs, since children's publishers were involved in setting the codes up. PM agreed that it would be a reasonable inclusion in the BIC Basic award's requirements for the revised PDEA Accreditation Scheme.
  **ACTION**: KL to liaise with The PA regarding the value of publishers supplying CBMC codes within their metadata and report back to the Group at the next meeting.

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- Publisher Information
  LW asked whether 'Imprint' means the publisher (i.e. the legal entity for legal requirements) or the actual imprint in this context. AI suggested that both the publisher and the imprint are required. JT agreed, noting that data aggregators need to be aware of the relationship between the publisher and imprint. AI noted that, in some instances, the imprint and the publisher would be the same and asked whether this would cause any issues. JT suggested that this would not cause concern. GB commented that it is better to have the fields populated than not but suggested that a note should be included in the grid to explain that the brand and legal entity may be the same. The Group agreed that both 'Publisher' and 'Imprint' should be a mandatory requirement for the BIC Basic award on the revised PDEA Accreditation Scheme. GB suggested that 'Imprint' should be 'Imprint / Brand' henceforth and 'Publisher' should be 'Publisher / Company'. The Group agreed.

- Publication Date
  NE suggested that the date format should be qualified as: 'YYYYMMDD'. LW agreed that this is a necessary measure to ensure that the publication date is not misunderstood.

- Author Name
  It was suggested that there should be 2 columns (minimum) supplied for the Author Name, i.e. first name and surname. AI suggested that the format of the BIC Basic grid should be discussed separately but agreed that the grid needs to be amended.

- Work Identifier
  The Group agreed to deprecate the requirement for a Work Identifier.

- Product IDs
  AI noted that there are 3 related products listed in the BIC Basic grid at present. He asked whether the related products listed are the most appropriate to include for the PDEA Accreditation Scheme. JB noted that Oxford University Press do receive a number of requests for previous / new related products and so this is a useful requirement. NE asked whether this is a requirement for BIC Basic, noting that ONIX users can provide this information via related product tags.

  GB noted that 'Predecessor' and 'Alternative' related products may be important but suggested that he would support the deprecation of 'Successor'. He also noted that there is not currently a defined format for this information to be supplied in. AI agreed, commenting that this could lead to multiple pieces of metadata being included within a single field. GB suggested that the BIC Basic grid needs to ensure that it is clear that multiple fields are required for the submission of this information.

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AI commented that 'Successor' can be a valuable addition to a metadata feed since it informs data recipients where to place a title. It was noted that this is a forward-looking tag, i.e. "this book will be replaced by…". NE informed the Group that Amazon do not use these codes exclusively to establish links between related products; they also use algorithms. PM suggested that the related product information could be represented as a set / group within the BIC Basic grid, to make it clear that the types of product are connected. The Group agreed that the 3 types of related product should remain on the BIC Basic grid but only as recommendations (i.e. not a mandatory requirement).

- Image
  The Group agreed that images should be supplied as a jpeg. They also agreed that the images should be RGB rather than CMYK and between 500-1500 pixels – 1000px minimum on the longest dimension or 500px on the shortest dimension, though 1500px on the longest dimension is ideal. GB suggested using the following wording: 'accessible / downloadable'. LW suggested that the file name of the image should be the corresponding book's ISBN. GB noted that this would fail at a higher level of accreditation but is acceptable for the BIC Basic award's requirements.

  GB noted that the PDEA Accreditation Scheme aims to encourage better practices and should therefore encourage organisations to update the images they provide, whenever they have been amended / changed. He suggested that using 'Current Image' rather than 'Image' within the wording of the grid may encourage the desired effect.

  NE noted that Amazon do not use URLs to update their images, using trigger dates instead. GB noted that ONIX records the date of the update to inform organisations when a new image has been submitted. CH noted that, for this reason, 'Current Image' cannot be a BIC Basic requirement since carrying out the best practice is reliant on ONIX-usage. GB disagreed, noting that a supply date does not need to be provided when sending a jpeg however it would not harm organisations to be aware of the fact that providing a supply date for their image is beneficial to other organisations and would give their organisations more credibility by doing so.

- Price Types
  PM suggested that an additional note could be provided in this section to inform organisations that other price types are available. AI noted that there isn't a list in existence for the BIC Basic grid to refer to. It was noted that "Free of Charge" is important here.

  NE suggested that 'VAT' should be mandatory so that retailers do not have to do audits to ascertain what is VAT-able. GB suggested that both of the following should be included: 'GBP incl. VAT' and 'GBP ex. VAT'. NE suggested an alternative, simply asking whether the product is eligible for VAT and providing a 'yes / no' for the

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response. The Group agreed to make 'GBP Retail Price ex. VAT' a mandatory requirement of the PDEA Accreditation Scheme. They also agreed to deprecate 'VAT Detail'.

KL noted that just because a book has a price in GBP does not necessarily mean that it is available for sale in the UK. NE agreed, suggesting that territorial rights should be mandatory on the revised PDEA Accreditation Scheme and the format of the information provided should be specified to avoid misinterpretation / errors. GB noted that there are ONIX codes for 'Exclusive Rights', 'Non-Exclusive Rights', 'Not available in the UK', 'Don't know', etc. He agreed that a statement of rights in the UK is needed and should therefore be a mandatory of the BIC Basic award. He pointed out that, at a basic level, there is a standard set of ONIX country codes for this purpose. KL noted that this addition would be to every organisation's advantage. GB suggested that publishers should refer to both the ONIX country codes and also those of the ISO. The Group agreed that 'GBP' should be a mandatory requirement of the revised PDEA Accreditation Scheme, and prices outside of the UK should be recommended but not a mandatory requirement.

**ACTION**: AI to amend the BIC Basic data element set to reflect the Group's decisions (above) and circulate to the Group for comment.

- BIC ONIX
AI informed the Group that he has amended the original BIC ONIX grid, adding in ONIX 3.0 requirements, where appropriate, comparing them against the Best Practice Guidelines; especially the areas / requirements that conflict with the current PDEA Accreditation Scheme. The following requirements were discussed:

- XML Declaration
AI has added a declaration for XML. He noted that the message encoding in this declaration should ideally be unicode UTF-8 but could be WIN-1252 or LATIN-1. PM suggested that the wording of this declaration will need to be looked into further. AI agreed, noting that it might be best to use the wording from the ONIX Release 3.0 documentation.

- Header
AI informed the Group that there are 3 defaults listed under this section of the ONIX Release 3.0 grid but suggested that these may not be necessary for the PDEA Accreditation Scheme. GB suggested that they should be present but only at individual product level (globally).

- Product Record (p.1)
AI suggested that it is plausible to list <Record Reference>, <RecordSourceType> and <RecordSourceName> as expectations of the Scheme. LW asked what publishers should use to name their product, if not the product's ISBN. AI confirmed that the

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Product Identifier (which is derived from the product's ISBN alongside a reference code) should be used.

AI noted that the Product Identifier definition in the grid is clear and straight forward to understand.

- Block 1: <DescriptiveDetail>: Product Form (p.3)
AI suggested that it needs to be clearer which products should be included in the Product form. PM agreed, noting that the grid will need to state what is expected. AI noted that he will ensure that the wording of this section of the grid fits with that of the ONIX Release 3.0 documentation. PM suggested that this section should be included in the documentation for the whole of the PDEA Accreditation Scheme, not just the ONIX Release 3.0 grid.

AI noted that "all products" in Product Form Code will need to be clarified. KL asked whether a format for this information should be specified. The Group agreed that the controlled vocabulary of ONIX Codelist 175 should be used.

The Group agreed that Trade Category Code should be removed from this grid.

AI noted that the definition for <Measure> Composite is in-line with this Group's discussion from earlier in this Workshop. He also noted that there are 3 additions to Product Form: 1) Product Form Feature, 2) <CountryOfManufacture>, and 3) <EpubTechnicalProtection>. PT noted that lots of organisations use third parties to distribute their DRM information on their behalf, so this could be difficult for those organisations to include it in their feed for the PDEA Accreditation Scheme. LW noted that DRM information isn't being used widely in ONIX at the moment so this may not affect many organisations, if any. GW agreed. GB noted that its usage varies from organisation to organisation. AI noted that, currently, this is listed as 'required' but it could be demoted to 'expected' if the Group deem this to be necessary. The Group agreed that it should be 'expected' on the revised PDEA Accreditation Scheme.

- Block 1: <DescriptiveDetail>: Product Part (p.4)
AI informed the Group that this section of the grid relates directly to the way in which ONIX operates. He noted that the definition for <ProductPart> composite refers to EDItEUR's guideline documents in case applicant organisations require further reading / clarification. In addition, he noted that 'Product Content Type Code' has been removed from the grid.

- Block 1: <DescriptiveDetail>: Collection (p.5)
AI noted that information for multiple-item products (i.e. books that come with a soft toy or a set of books in a pack) is not required in the <TitleDetail> composite; these should be described using the Title elements on p.6 of the documentation. GB

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noted that safety warnings should accompany the information about these products, if applicable. AI agreed that safety warnings should be a conditional requirement of the PDEA Accreditation Scheme.

- Block 1: <DescriptiveDetail>: Title (p.6)
  AI noted that this requirement is mandatory but suggested that the term 'Title without Prefix' may be interpreted better and encourage better practice from publishers.

- Block 1: <DescriptiveDetail>: Authorship (p.7)
  AI informed the Group that a tag for <NoContributor> has been added to the grid. He also noted that Corporate Name has been inverted.

- Block 1: <DescriptiveDetail>: Language (p.10)
  AI suggested that the wording for 'English' included in this grid's definition should be revised. PM noted that Language is now a mandatory requirement at BIC Basic level and should therefore be Mandatory in this grid too.

- Block 1: <DescriptiveDetail>: Extent and other content (p.11)
  GB noted that "filesize" should be removed from the definition of the <Extent> composite.

- Block 1: <DescriptiveDetail>: Subject (p.12)
  AI noted that *Thema* should be included in the definition for the <Subject> composite on the revised grid. He also noted that keywords have been included as an expectation.

- Block 1: <DescriptiveDetail>: Audience / Readership (p.13)
  AI informed the Group that Audience code has now been deprecated and the codes should be included in the <Audience> composite instead. The definition for the <AudienceRange> composite also needs to be reworded since audience range has a much broader application than the definition currently suggests.

- Block 2: <CollateralDetail> (p.14-16)
  AI notified the Group that there is an issue with the varied use of long and short tags. He suggested that an agreed format should be recommended for the <TextContent> composite, in order of preference.

- Block 4: <PublishingDetail> (p.19-21)
  The Group noted that this section of the grid should refer back to the requirements for the BIC Basic data elements set. It was noted that it is typical to provide a global status and only override this if / when the market status is different. AI suggested that this definition needs to be clearer, stating that it should be one or the other – not both.

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It was noted that 'rest of the world' (ROW) sales rights need to be added into the definition for the <SalesRights> composite.

- Block 5: <RelatedMaterial> (p.23)
  AI suggested that a complete set of <RelatedProduct> should be included here. GB noted that related products can be built around sets / series and agreed that these links would be useful to publishers. He suggested that a wider range of relationships may also be needed.

- Block 6: <ProductSupply>: Market publishing details (p.24)
  It was asked whether export-only products are included in the statistics for the purpose of the PDEA Accreditation Scheme. The Group agreed that this will need to be discussed at the next meeting of the PDEA Review Task & Finish Working Group.
  **ACTION**: KL to add 'export-only' to the agenda for the next meeting of the PDEA Review Workshop.

  AI noted that the definition for the <MarketDate> composite needs to be amended / made clearer.

- Block 6: <ProductSupply>: Supplier, availability and prices (p.26)
  It was noted that the <SupplierIdentifier> composite should recommend the use of GLN rather than EAN.

  AI noted that, due to this Group's discussion regarding POD titles, the Order Time is required, when applicable. He also noted that 'Unpriced Item Type' could be easily be misunderstood and so has been changed to: 'Special Price Code'.

  AI informed the Group that the definition for <Tax> composite has been changed so that tax is described in full. This means that all occurrences of the <Price> composite which carry UK prices must include this composite for the revised PDEA Accreditation Scheme; even if the applicable VAT rate is zero.

  AI suggested that it should be strongly recommended that publishers should not use the defaults for Currency Code.

  Two additions have been made to this Block: a <Territory> composite and a <PriceDate> composite.

Any feedback from this Group about any of the decisions made should be directed to KL, AI and GB.
**ACTION**: AI to amend the BIC ONIX data element set to reflect the Group's decisions (above) and circulate to the Group for comment.
**ACTION**: ALL to provide any feedback they have on this document, as soon as possible after the documentation has been circulated.

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5. **A.O.B**

It was noted that the Description data element for BIC Basic will need to be discussed and possibly amended in a subsequent meeting of this Group.

NE suggested that it would be beneficial to retailers to receive an information sheet about the benefits of / reasons to migrate to ONIX 3.0. KL informed NE that this was discussed at the last meeting of the UK ONIX National Group and will be produced shortly.

6. **Date of the next workshop**

The Group agreed that holding another workshop to continue discussions about the revision of the PDEA accreditation scheme would be beneficial. This next workshop will take place on Thursday 28th January 2016.