

UK ONIX NATIONAL GROUP MEETING – Minutes**Location:** PLS, 1st Floor, Barnard's Inn, 86 Fetter Lane, London EC4A 1EN**Date and time:** Wednesday 7th June 2017, 2pm**Minutes taken by:** Alaina-Marie Bassett**Present**

Alaina-Marie Bassett, BIC
 Graham Bell, EDItEUR
 Emma Gibson, Pearson (dialled in) (EGI)
 Toby Gill, Virtusales (dialled in)
 Ingrid Harrold, Dorling Kindersley (dialled in)
 Azar Hussain, Faber & Faber
 Martin Klopstock, Kogan Page
 Alistair Mann, Hachette
 Karen Osterley, Pearson (dialled in)
 Jessica Patient, Nielsen
 Chris Saynor, EDItEUR
 Jack Tipping, Bowker
 Gabrielle Wallington, Waterstones

Laura Williams, Penguin Random House
 Howard Willows, Nielsen (Chair)

Apologies

Kat Coveyduck, Virtusales
 Eric Green, Bibliographic Data Services (EGR)
 Lada Kriz, Penguin Random House
 Karina Luke, BIC
 Peter Mathews, Cambridge University Press
 Fawzia Nazir, Ingenta
 David Seymour, Taylor & Francis Group
 Emma Whiting, Ingenta
 Tim Wilson, Hachette
 Alfred Willmann, Penguin Random House

1. Introductions & Apologies

HW welcomed the Group and the apologies were delivered. The Group introduced themselves for both the purpose of the minutes and those attending via conference calling facilities.

2. Competition Law – Conduct reminder

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

3. Review of minutes and follow up on actions from the last meeting

The Group approved the minutes from the last meeting with corrections from GB; AMB amended the minutes on Thursday 1st June 2017. The following actions were discussed:

- Codelist Issue 36 and proposals for Issue 37
 GB reported that both Codelist Issue 36 and the proposals document for Issue 37 were circulated to the Group after the last meeting.
- BIC Workshop: Best Practice for Embedding HTML Mark-Up in ONIX
 HW confirmed that information about this workshop was circulated to the Group by AMB and that it went ahead as scheduled on Tuesday 20th April 2017. An update on this workshop will be provided under Item 7 of these minutes.

4. Codelists

- Review of Issue 37
 CS reported that Codelist Issue 37 was published in April 2017. He went through the additions for this Issue, highlighting codes that may be of particular interest to the Group. EGI and KO dialled into the meeting.

* NB: In relation to the red asterisked items (below), any clarification of meaning applies to the use of these codes in both ONIX 2.1 and ONIX 3.0, however ONIX 2.1 users must continue to use Issue 36 which does not include this text update.

- List 17 – Contributor role code (additions apply to ONIX 3.0 only)
Two new contributor role codes have now been added to List 17: Historical Advisor (B30) and Original Editor (B31).
- List 44 – Name code type (addition applies to ONIX 3.0 only)
A new code type for Nasjonalt Autoritetsregister (Code 36) has been added to List 44; this is a Norwegian national authority file for personal and corporate names.
- List 45 – Publishing role code (ONIX 2.1 and 3.0)*
A clarification to List 45, Code 14 states that Publication Funder, Research Funder and Funding Body are all intended primarily for use with open access publications.
- List 65 – Availability (addition applies to ONIX 3.0 only)
A new availability code for Not Yet Available, Postponed Indefinitely (code 09) has been added to List 65. This code should be used in preference to code 10 where the publisher has indicated that a previously-announced publication date is no longer correct, and no new date has been announced.
- List 81 – Product content type (ONIX 2.1 and 3.0)*
Minor changes have been made to List 81 for Text (Eye-Readable) (Code 10), Additional Eye-Readable Text Not Part of Main Work (Code 16) and Additional Images / Graphics Not Part of Main Work (Code 20) to ensure that the codes are not exclusive to e-publications.
- List 93 – Supplier role (addition applies to ONIX 3.0 only)
Three new roles for Exclusive Distributor to Retailers and End-Customers (Code 13), Non-Exclusive Distributor to Retailers and End-Customers (Code 14) and Distributor to Retailers and End-Customers (Code 15) have been added to List 93, allowing a supplier to indicate when a (physical) product is available for ‘drop-shipment’ direct to the end-customer as well as via normal retail channels.
- List 139 – ONIX Retail Sales Outlet ID (addition applies to ONIX 3.0 only)
A new retail sales outlet ID for BDBuzz has been added to List 139: Code BDZ.
- List 145 – Usage type (ONIX 3.0 only)
A clarification for Loan Renewal (Code 08) has been added to List 145 to include information about loan extensions as well as consecutive loans / renewals.
- List 150 – Cited content type (ONIX 3.0 only)
A clarification for Audio Disc (Code AE) has been added to List 150, stating that this

code (which excludes CD-audio) is for 'yellow book' (CD-ROM-style) discs and should be used in Product Form Detail to specify the format of the data on the disc.

- List 156 – Cited content type (ONIX 3.0 only)
A new code for Curated List (Code 05) has been added to List 156. This code should be used for a 'best books of the year' or '25 books you should have read' list, which may have been compiled without regard to the title's bestseller status.
- List 175 – Product form detail code (ONIX 3.0 only)
A new code for BRF / Electronic Braille file (Code E146) has been added to List 175.
- List 196 – e-Publication accessibility details (addition applies to ONIX 3.0 only)
A new code for Accessibility Summary (Code 00) has been added to List 196 to allow publishers to provide a short explanatory summary of the accessibility features of their e-product, which is consistent with the more specific conformance and feature details provided. See Codes 94-97 for further information.
- List 230 – Price constraint type (ONIX 3.0 only)
A clarification for Loan Renewal (Code 08) has been added to List 230 to include information about loan extensions as well as consecutive loans / renewals. This clarification compliments that of List 145, Code 08 (above).

GB noted that Issue 37 is the first of ONIX's Codelists that is not compatible with ONIX 2.1; it therefore contains only those lists required for ONIX 3.0. In addition, he noted that ONIX 2.1 will remain fully usable – using Issue 36 of the codelists or earlier – but it is not intended for use with later codelist issues. Issue 36 is available via the archive section of the EDItEUR website, here: <http://www.editeur.org/15/Archived-Previous-Releases>

- Proposals for Issue 38
CS and GB went through the proposals document, which was circulated on Friday 2nd June 2017, highlighting codes that may be of particular interest to the Group:
 - List 17 – Contributor role (addition applies to ONIX 3.0 only)
A clarification for With (Code A02) to include secondary authors and a clarification of Pop-Ups By (Code A41) to include paper engineers for pop-up books have been suggested for List 17. In addition, GB reported that a new code for Choreographer (Code D04) has been proposed as some organisations use ONIX to describe their video and DVD products.
 - List 48 – Measure type (addition applies to ONIX 3.0 only)
Unpackaged Height (Code 14), Unpackaged Width (Code 15) and Unpackaged Thickness (Code 16) have all been suggested as new codes for List 48 to inform metadata recipients about the measurements of a product, e.g. a teddy bear, without its packaging / box.

- List 81 – Content type (addition applies to ONIX 3.0 only)
A new code for Scripting (Code 40) has been put forward by the French ONIX National Group to allow organisations to inform their metadata recipients that their e-publication contains microprograms (written for example in Javascript) and executed within the reading system.
- List 139 – ONIX Retail Sales Outlet ID (addition applies to ONIX 3.0 only)
A new retail sales outlet ID for Internet Bookshop Italia has been suggested as an addition for List 139: Code IBS.
- List 150 – Product form (ONIX 3.0 only)
GB reported that 2 proposals for List 150 have been put forward for LP / Vinyl Disc (Code AM) and Umbrella (Code ZN); in addition, a third proposal has also been put forward by the Norwegian ONIX National Group for Tableware (Code ZM), e.g. for branded plates and bowls. GB noted that this code could be added to List 150 but it could equally be added as a clarification for branded / promotional Mugs (Code ZK). The Group agreed that more mugs are produced as promotional tie-ins than plates / bowls however some popular children’s brands (such as Peter Rabbit) do include tableware. AM and MK agreed that it would not be beneficial to dilute the purpose of code ZK as it is already in use. GB suggested that further research should be carried out to ascertain how many products currently contain a plate or bowl.
 - ❖ **DECISION:** The Group agreed that their preference would be to add a new code for Tableware (code ZM) to List 150, and retain the scope of ZK for mugs only.
 - **ACTION:** GW to liaise with her colleagues regarding the number of products that Waterstones sells which include a mug, plate or bowl and report back to GB.
- List 166 – Supply date role (ONIX 3.0 only)
When a product is taken off the market, it is common for prior purchasers (i.e. existing ‘owners’) to still be able download copies. Sometimes a publisher chooses to prevent downloads even by prior purchasers, and the proposal enables publishers to include a date when downloads will cease. The second proposal is intended for when a DRM system is ‘retired’ – this may prevent use of a product by existing ‘owners’.
- List 168 – Price condition quantity type (ONIX 3.0 only)
A proposal for Number of Linked Products (Code 3) has been put forwards to help organisations describe multiple purchase deals / discounts in ONIX. GB noted that this code, if approved, will be used in conjunction with Price condition type 06 and the quantity of units included.
- List 175 – Product form detail (ONIX 3.0 only)
Two proposals have been put forward as additions for List 175: Taschenbuch (Code B133) and With Elastic Strap (Code B517). The former is for ‘pocket-sized’ books in Germany, and the latter for example could be used with Moleskine notebooks (and similar items).

- List 197 – Collection sequence type (ONIX 3.0 only)
A new collection sequence type has been proposed for Suggested Reading Order (Code 06) for titles that differ from the title order, publication order, narrative order, etc. such as Star Wars.
- List 198 – Product contact role (ONIX 3.0 only)
A proposal for Returns Authorisation Contact was put forward by members of the BIC Price & Availability (P&A) Task & Finish Working Group (T&FWG) to allow retailers / wholesalers to request returns authorisation from publishers that do their own distribution. GB noted that contact details for 3rd party distributors will need to be addressed in future.

GB noted that codes beginning with Q in List 17 are reserved for internal use only, and must never be included in messages exchanged *between* organisations.

5. ONIX activity

- Update on ONIX 3.0.4
GB informed the Group that proposals are now being accepted for the next minor revision of ONIX, which will be published in 2018. A dedicated Working Group (which will be formed of approx. 6 international representatives) will review the proposals during the summer; a UK representative is required for this Group. GB noted that eBook specifications to eradicate sidecar files will be the most important consideration for this Group.
 - **ACTION:** ALL to consider volunteering to sit on the ONIX 3.0.4 Working Group. Any interested people should liaise with GB and CS by **Friday 7th July 2017**.
 - **ACTION:** ALL to put forward suggestions / requirements for ONIX 3.0.4, for requirements that cannot currently be conveyed, to CS, GB and HW, ASAP. Of particular interest is any metadata currently communicated by so-called 'sidecar files' e.g. to POD vendors, e-book asset distributors, libraries, etc.

6. Promotion and Uptake of ONIX 3.0

- GW – GW confirmed that she continues to promote the idea of ONIX 3.0 internally to Waterstones' website team. She advised that Waterstones will not be able to implement ONIX 3.0 for 3-6 months but that her colleagues are aware of the benefits.
- AM – Hachette divisions are currently in the process of migrating to ONIX 3.0. AW noted that Hachette now has a live ONIX 3.0 feed with both BDS and Bowker.
- AH – Faber & Faber has received one request for an ONIX 3.0 feed in recent months which has been supplied to the organisation accordingly.
- JT – Bowker are currently testing 15 ONIX 3.0 feeds and more are likely to be in production over the coming few weeks.
- JP – around 50% of new feeds to Nielsen are now ONIX 3.0.
- LW – Penguin Random House has received further interest in ONIX 3.0 recently although LW reported that the organisation's longstanding business associates appear to be less inclined to migrate. LW confirmed that Penguin Random House will continue to liaise with these organisations regarding ONIX 3.0 and its benefits.

- MK –Kogan Page now sends ONIX 3.0 feeds to all its business partners excluding one particularly large online retailer. MK noted that, to date, Kogan Page has been unable to identify the right person to liaise with at the organisation. GB confirmed that the organisation is able to ingest ONIX 3.0 feeds (in at least some circumstances – this may mean ‘e-books only’), however some of its representatives may be unaware of this. MK noted that Kogan Page’s eBook metadata is disseminated through CoreSource so only ONIX 2.1 metadata for physical books is supplied to the online retailer. He commented that Kogan Page will be able to switch off its ONIX 2.1 feed when the organisation accepts its ONIX 3.0 feed however a testing process will need to be provided by the organisation to achieve this. The Group suggested that BIC should consider sending an email to the organisation to facilitate the supply of ONIX 3.0 feeds.
 - **ACTION:** ALL to consider what needs to be communicated to this retailer regarding the acceptance of ONIX 3.0 feeds in order to begin a useful dialogue.
 - **ACTION:** AMB to liaise with KL regarding this proposed BIC communication.
- TG – Virtuales Publishing Solutions has received requests for new ONIX 3.0 functionality by some of its customers. TG noted that this is encouraging.
- IH – No further ONIX 3.0 feed requests have been received recently however IH confirmed that she continues to liaise with business partners to encourage the use of ONIX 3.0.
- KO –Pearson is currently undergoing a change of responsibilities in terms of its staff; as such a proactive review of Pearson’s customers will take place in due course and relevant organisations will be approached about ONIX 3.0. KO noted that she has received requests for new requirements for ONIX 3.0 from her colleagues also.
- HW – Nielsen is now in the final stages of migrating to its new system, which is based on ONIX 3.0 throughout, although it will initially support only legacy outputs.
- GB – GB reported that many regions which didn’t use ONIX until recently have adopted ONIX 3.0. He noted however that five countries that implemented ONIX early in its development, three are still relatively early in the process of migration – the US, UK and France. GB reported that in Germany, ONIX 3.0 is now strongly preferable to VLB and that Spain has more or less migrated to 3.0 because of changed made in DILVE (VLB and DILVE are national books-in-print systems).

7. Proposed topics for ONIX Workshops

- Best Practice for Embedding HTML Mark-Up in ONIX
 AMB reported that this workshop took place on Thursday 20th April 2017 with 15 people in attendance. LW confirmed that it was useful to hear what best practice with regards to embedding HTML involves but it was also beneficial to understand what else can be done if the best practice process is not currently viable / possible for certain organisations. AM noted Hachette is currently liaising with, and awaiting a reply from, Virtuales Publishing Solutions regarding Hachette system’s XHTML requirements as a result of the workshop.
- Topics for future ONIX workshops
 GB and CS noted that the following topics have been suggested for future workshops:
 - Sales / territorial rights
 - Block 6, Pricing

- How to use ONIX for Open Access titles
- Building in links (e.g. with related products, collections identifiers, series names, etc.)
- Keyword selection
- Subject classification and audience
- How to validating an ONIX file

Some of these topics are already the subject of short application notes and guidance on the EDItEUR website: <http://www.editeur.org/93/Release-3.0-Downloads/#How%20to>

MK commented that some of the proposed topics (listed above) are system-dependent however GB noted that this was also the case for the HTML workshop. MK suggested that representatives from each major system vendor could be asked to attend the workshops so that the attendees can work with them in sub-groups during the event. GB and AMB agreed that this would not be appropriate as it could lead to disproportionate sub-groups and appear to be a criticism of each organisation's system(s). GB noted that attendees were deliberately not matched with the representatives for their organisation's system at the last workshop for this reason. He commented however that attendees can, to a certain extent, choose which sub-group to join / who to sit with.

GW informed the Group that the BIC P&A T&FWG is about to begin the second phase of its project regarding pricing. She suggested that the feedback from a pricing workshop could help facilitate the work of the T&FWG accordingly and also the forthcoming BIC Metadata Map project. GB proposed that the next meeting of the P&A T&FWG should therefore be postponed with the pricing workshop taking its place on Wednesday 26th July 2017. The Group agreed that the P&A T&FWG members should be invited to attend the workshop first, followed by this Group and the rest of BIC's membership in succession. They agreed that the workshop will help to identify the issues being experienced at present with pricing.

- **ACTION:** AMB to set up the pricing workshop ASAP for a maximum of 30 people (including trainers and BIC staff) at the CILIP Building.
- **ACTION:** AMB to inform all attendees that they must bring anonymised examples from their respective organisations to the workshop as well as issues experienced.

8. A.O.B.

- ONIX Implementation Group

GB reported that a message from Cambridge University Press was recently posted on the ONIX Implementation Group regarding Amazon's advice for providing metadata about educational books, i.e. linking a textbook to its related examination board / the year of the examination, etc. GB noted that he has since liaised with the retailer regarding its advice, to clarify how the information should be supplied in ONIX 2.1 (using "Other Text" and "Official Recommendation") and in ONIX 3.0 (using supporting resource "Text" and "Official Recommendation"). GB was pleased to confirm that the information he provided was well received. GB noted that the agreed solution will need to be put in place ASAP to ensure that it is in use prior to the beginning of the new academic year.

- **ACTION:** GB to continue liaising with Amazon regarding the current standards in existence which can facilitate providing information for textbooks.
- **ACTION:** GB to circulate a document containing the best practices for ONIX 2.1 and ONIX 3.0 users, once agreed with the retailer.

Post-Meeting Update: Best practice has now been agreed with Amazon and circulated to members of this Group and others; it has also been incorporated into the ONIX 3.0 Implementation and Best Practice Guide. The retailer has circulated the advice to its suppliers.

- Thema

AM suggested that Hachette would be interested in joining the UK *Thema* National Group going forwards, as Hachette intends to begin its migration to *Thema* soon.

- **ACTION:** AMB to liaise with AM regarding Hachette joining the UK *Thema* Group.

- Metadata for assets

MK informed the Group that Kogan Page has some products for sale that have not been allocated an ISBN, such as free of charge products and items that are only sold via the Kogan Page website. He noted however that metadata still needs to be generated for these assets including prices. GB commented that since these products are only sold direct from KP, product relation tags and proprietary IDs to link them to trade products would be useful, however a full ONIX record could be of even more use. MK asked whether assets should be considered as a proposal / an extension for ONIX 3.0.4 however GB noted that there is already a way to supply all of the information MK requires in ONIX.

- **ACTION:** GB to liaise with MK regarding this topic offline.

9. Date of the next meeting

Wednesday 13th September 2017.