

Migrating from ONIX 2.1 to ONIX 3.0

Many publishers, intermediaries and retailers have implemented ONIX, mostly as version 2.1. But from as far back as 2010, they have been urged to adopt ONIX 3.0. This BIC Bite addresses the question, “Why?”

Background

ONIX (ONline Information eXchange) is the book industry's primary metadata standard for the supply of information about books and e-books, and is developed and supported by EDItEUR, the trade standards body for the global book, e-book and serials supply chain. ONIX for Books is strongly supported by BIC, and BIC's Metadata Sub-Committee is the UK ONIX national group which provides input to the international development of the standard. For basic information on ONIX, see “BIC Bites: Introduction to ONIX”. ONIX 1.0 (2000), ONIX 2.0 (2001) and 2.1 (2003) were excellent ways to inform trading partners of product metadata. But since then there have been some major changes in the book industry, most notably the rise of global retailers and digital sales. An ONIX standard which reflects the new products and channels is now needed, and ONIX 3.0 has been specifically designed for these requirements. The other main reason is the ongoing cost of continuing with old parts of ONIX which are no longer used (or are deprecated) but which still have to be supported by ONIX recipients. Organisations that currently use ONIX 2.1 should transition to ONIX 3.0, and those adopting ONIX for the first time should specify version 3.0 from the outset, as after December 2014 version 2.1 is no longer fully supported.

What's New in ONIX 3.0?

ONIX 3.0 has a range of improvements reflecting the new requirements of the industry. It has a much more consistent structure than 2.1, while at the same time being more flexible.

1. There are improvements in how you can specify sales rights, territories, markets and price validity and an improved framework to cope with new ways of trading e-books, including licensing, usage permissions and constraints (whether these are enforced by DRM technology or not).
2. Creation of a new ‘Product Supply’ group enables the status of a product in different markets to be more clearly and accurately described.
3. Most textual metadata can now be provided in multiple languages ‘in parallel’, within a single record.
4. ONIX 3.0 replaces Sets and Series with a more logical “Collections” hierarchy.
5. New data element groups have been introduced to cover the much greater variety of marketing ‘collateral’ that publishers are now making available over the Internet, or that publishers and aggregators are citing in order to support more effective online selling. Marketing material can also be targeted at specific territories.
6. The use of Unicode characters supersedes the old ‘named character entities’, for example using “...” in place of “…” to represent an ellipsis (though you can still use its numerical equivalent, “…”).
7. Part of the change comprises a tidying up exercise to remove previously deprecated tags and replace them with more flexible composite tags. This ‘spring cleaning’ reduces the number of XML tags in 3.0, and at the same time makes 3.0 simpler to update with new capabilities in the future.
8. Block Updates – A small change in the metadata no longer necessitates re-sending the whole record. With the new “Block” updates you can send only the block that needs changing, reducing the amount of data needing to be distributed.
9. ONIX 3.0 has improved documentation and supporting software tools including the XSD and RNG schemas (as well as a work-in-progress Schematron), all of which should help developers and implementers. There is also an extensive *Implementation and Best Practice Guide* which aims to improve the international interoperability of ONIX implementations.

Some of these changes are complete re-thinks offering definite improvements over ONIX 2.1, and are highly recommended for organisations involved in selling e-publications or in the international book trade. Other changes are incremental, adding new capabilities that are merely optional. Yet in many areas, ONIX 3.0 is essentially unchanged – there is a great deal of continuity. Overall, the new version reflects a decade of experience with ONIX, and with XML itself, and provides a wider and richer range of metadata.

The Implementation Problem

ONIX 3.0 will be better for everyone involved in the book metadata supply chain. To send ONIX 3.0 you need a trading partner capable of receiving ONIX 3.0, and to receive an ONIX 3.0 file you need a trading partner who is capable of supplying ONIX 3.0. This could lead to deadlock: there's a temptation to stay on ONIX 2.1 until most of your trading partners have upgraded. There is the added problem of accommodating both ONIX 2.1 and 3.0 simultaneously until your last trading partner has switched (when you can then 'retire' your ONIX 2.1 data feed).

In practice, the speed of adoption of 3.0 varies by country, with some smaller countries adopting it quickly and comprehensively while larger countries are much slower. Most off-the-shelf metadata management applications already provide ONIX 3.0 capability, and a growing number of major data recipient are ready.

Since the sunset date at the end of 2014, support for ONIX 2.1 has been reduced, and from the beginning of 2017 it is essentially frozen (including the codelists – issue 36 is the latest that is compatible with 2.1). EDItEUR and the ONIX International Steering Committee gave three years notice of this sunset, with the aim to minimising the period when publishers and retailers would have to support both 2.1 and 3.0. BIC members are strongly advised to upgrade to ONIX 3.0 as soon as possible, and contact their systems suppliers and trading partners to discover their options for upgrades, or to discuss sending or receiving ONIX 3.0 test files.

What effort is needed to switch to ONIX 3.0

ONIX 3.0 is approximately 60% the same as ONIX 2.1, so it represents a fairly significant development rather than just a simple new release. However, with a well designed product database, you should not need to implement any disruptive database changes – so in this case, ONIX 3.0 would be more like implementing a new report format. Most of those who have added ONIX 3.0 to an existing system have reported it to require less work than they originally expected. Leading systems vendors have already implemented ONIX 3.0 or are in the later stages of development, and if you use their system then it should be fairly straightforward to work with them and with your trading partners.

BIC will be monitoring the roll-out to ONIX 3.0 and highlighting the names of ONIX 3.0 capable organisations on the BIC website so that you can identify trading partners who are already able to proceed to implementation.

BIC members can raise questions about ONIX 3.0 with the BIC Metadata Sub-Committee and information is available on our website at www.bic.org.uk. Alternatively, you can contact EDItEUR via its website at www.editeur.org.

Training

BIC runs a range of metadata training courses including the Metadata for Beginners, ONIX: Essentials and Advanced ONIX for Books courses. BIC has also run briefing sessions on the specific challenges and details of migrating from ONIX 2.1 to 3.0. Large organisations might want specific ONIX 3.0 training in-house, and they should contact BIC (Karina@bic.org.uk) to arrange this.

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