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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 standard for the supply of metadata about books, e-books and audiobooks. It is developed and supported by EDItEUR, the trade standards body for the global book, e-book, audio and serials supply chain. The use of 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 version 2.1 is no longer fully supported. ONIX 3.0 will be mandatory for Gold-level accreditation under BIC's [Product Data Excellence Award](#) Scheme from 2020.

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 and logical 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 <ProductSupply> group enables the availability and distribution arrangements for 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 “Collection” concept.
5. New data elements have been introduced to cover the much greater variety of marketing collateral that publishers are making available over the Internet to support more effective online selling. Marketing material can also be targeted at specific territories and use can be constrained by date.
6. Promotional events such as author signing tours can be listed.
7. The use of native Unicode characters supersedes the old ‘named character entities’, for example using “...” in place of “…” to represent an ellipsis.
8. 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.
9. Small changes in the metadata no longer necessitate re-sending the whole record. With the new “Block updates” you need send only the block that needs changing, reducing the amount of data needing to be distributed and processed by recipients.
10. ONIX 3.0 has greatly improved documentation and supporting software tools including the XSD and RNG schemas, as well as an optional ‘strict’ XSD schema for enhanced message validation, all of which should help developers and implementers. There's also an extensive global *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 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 smaller countries adopting it quickly and larger nations more slowly. Off-the-shelf metadata management applications already provide ONIX 3.0 capability, the larger UK publishers can provide 3.0, and major data recipients accept it. A few recipients now demand *only* 3.0.

After a three-year notice period from EDItEUR and the ONIX International Steering Committee, and a sunset date at the end of 2014, support for ONIX 2.1 has been reduced. From the beginning of 2017 it has essentially been frozen (including the code lists – issue 36 is the last that is compatible with 2.1).

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 update. 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 – a recent BISG survey indicates it can commonly require two man-months of effort or less. Leading systems vendors have already implemented ONIX 3.0, and if you use an off-the-shelf system then it should be fairly straightforward to work with the vendor and with your trading partners. To minimise the period when publishers and retailers have to support both 2.1 and 3.0 in parallel, BIC members are strongly advised to upgrade to ONIX 3.0 as soon as possible, and to contact their systems suppliers and trading partners to discover their options for upgrades or to discuss sending or receiving ONIX 3.0 test files. For more details on the changes between 2.1 and 3.0, and the benefits, a detailed webinar recording is available from <https://bit.ly/2SVUsJ1>.

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 or the ONIX online discussion forum (<https://groups.io/g/onix> – subscribe via e-mail to onix+subscribe@groups.io).

Training

BIC runs a range of training courses including the *ONIX: Essentials* and *ONIX: Advanced topics* courses. Large organisations might want specific ONIX 3.0 training in-house: contact BIC (info@bic.org.uk) to arrange this.

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Last updated 19th May 2020