



Thema

The new international subject category standard for books and e-books

Background

Subject classification of books and e-books is one of the keys to improved merchandising, discoverability, sales and market intelligence. The need for a *global* scheme is clear, given the increasingly international nature of the book trade, the pressure to reduce duplication of work where more than one scheme is in use, and the elimination of costly and imprecise mapping processes.

Prior to the development of *Thema*, subject categorization schemes relevant to the book trade had been nationally-focused. For example, the North American trade uses the BISAC scheme administered by the Book Industry Study Group (BISG). The UK trade uses a scheme devised by Book Industry Communication (BIC). The remainder of the English-language publishing world is forced to use both, with the added cost and complexity which that implies. Whether it is CLIL in France or WGS in Germany, each country has its own indigenous subject classification scheme (and often more than one...). In contrast, established global schemes – like Dewey or the Universal Decimal Classification (UDC) – are used primarily in the library world and are unsuitable for the needs of the book trade.

Until 2010, these national divisions in the book trade were accepted as inevitable. Within any one country, the schemes were refined and optimized. Publishers and booksellers operating internationally implemented complex mappings from one scheme to another. But each mapping loses quality, and requires maintenance as schemes are revised. At the same time, an international metadata scheme like ONIX for Books allowed most other key metadata elements to be conveyed relatively smoothly between organizations, across national and linguistic barriers.

Origins and Aims of Thema

Work on the modification of the UK BIC scheme in 2011 and 2012 led to the formation of a much larger group of stakeholders willing to work on a global scheme that ultimately became *Thema*.

Thema aims to be global in scope, multi-cultural and multi-lingual, applicable to all parts of the book supply chain, and flexible enough to allow each market to retain its unique cultural voice, while remaining a unified and simple-to-adopt standard. It can be used alongside existing national schemes like BIC, BISAC, WGS or CLIL, and has the potential to eventually replace them – though this is not an immediate goal.

The *Thema* project was formally launched at a session during the Tools of Change Frankfurt conference in October 2012. It garnered support from trade organizations in more than a dozen countries, crucially including both North American and European

stakeholders. A pilot version of the scheme was developed and published, and a governance structure was built to ensure a secure future for the scheme. Frankfurt 2013 saw the formal launch of version 1.0 of *Thema*, plus the first meeting of the *Thema* International Steering Committee. This version is currently available for implementation and national groups are working on its adaptation to national specificities.

Governance and Status of *Thema*

Currently countries with *Thema* national groups include, Canada, Egypt, Germany (jointly with Austria and Switzerland), Italy, Norway, Spain, Sweden, UK and USA.

Thema is managed by EDItEUR, the trade standards body for the global book trade which also manages ONIX for Books, EDItX and other metadata, identifier and e-commerce standards. EDItEUR is a not-for-profit membership-supported organization that works for the benefit of the global book trade. It has 100+ members in more than 20 countries around the world: The International Publishers Association is a charter member and is represented on the EDItEUR board.

Following the successful ONIX model, EDItEUR has set up an International Steering Committee for *Thema*, comprising representatives of various national stakeholder groups, to guide the future development of the scheme. The committee will meet face-to-face at least twice a year, during the London and Frankfurt book fairs.

Like other EDItEUR standards, *Thema* is free of charge for anyone to implement, under a permissive EDItEUR license. In particular, there is no requirement for EDItEUR membership – though membership is always welcomed, and members have a more direct stake in the future development of EDItEUR standards.

What Steps Should IPA Members and Publishers Take?

- *Thema* is important for the international publishing community, including publishers who expect growth in ordering or consuming books via Internet, or who export a significant proportion of their products. It solves problems for publishers concerned with the difficulties of using multiple national subject classification schemes, or the cost of maintenance and imprecision of mappings from scheme to scheme. *Thema* also enables valuable international comparisons in market developments.
- *Thema* can already be implemented alongside national or internal subject schema, by embedding the *Thema* codes in the metadata they distribute to their supply chain partners. There is a cost in adapting a national scheme or switching to *Thema*. Still, the positive international experience with the ONIX standard has proven the value of using such international standards even in small language areas.
- Publishers associations should consider facilitating a *Thema* national group and should encourage the participation of interested publishers, booksellers, distributors and companies administering bibliographic databases. National groups have an important role in the creation of translations of the scheme, mappings from existing national subject schemes to *Thema*, and of *Thema* ‘national extensions’ – optional parts of the scheme tailored to local detail that may be unnecessary at the global level. In addition, national groups have a vital place in the governance of the scheme via representation on the *Thema* International Steering Committee, and in promoting wide adoption of the scheme. (Ideally, at least one member of each national group

should be an EDItEUR member, but EDItEUR places few other requirements on the nature of such a group.)

Resources and Further Details

The *Thema* section of the EDItEUR website is at <http://www.editeur.org/151/Thema>.

This page contains links to:

- The *Thema* v1.0 codes and headings (currently available only in English, in an Excel file, but links to other language versions will be made available)
- basic instructions for use of *Thema*
- an online interactive category picker (showing partial translations in a number of languages, including for example Russian and Arabic – further translations will be added as national groups make them available)
- a mapping from BIC 2.1 to *Thema* v1.0 (for re-classification of backlist titles)

Other resources will be posted as they become available. In particular, a mapping from BISAC to *Thema* is expected to be available in early 2014.

Information about national groups and governance can be found at <http://www.editeur.org/153/maintenance-and-support>

Other enquiries by e-mail to info@editeur.org

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Annex

Technical Structure of the *Thema* Scheme

Although it draws most heavily on BIC, *Thema* builds upon the experience of many established national schemes. It lays out a hierarchy of subjects: 20 top level categories, each subdivided into many sub-categories, and each having a heading (eg 'Geological surface processes (geomorphology)'), an alphanumeric code (eg 'RBGD'), and in some cases associated notes. There are around 2500 subject headings in total, and some examples are shown below:

<i>Code</i>	<i>Heading</i>
AGA	History of art
XAMC	Manga: Kodomo
NHW	Military history
QRRF	Zoroastrianism
KJMP	Project management
LWKF	Shariah law: family relations
MKE	Dentistry
UGB	Web graphics & design
WBB	TV / celebrity chef cookbooks
YBC	Children's picture books

In addition to the headings, there are post-coordinated 'qualifiers' that can be used to refine the meaning of the main subject categories, for example:

<i>Code</i>	<i>Heading</i>	<i>Qualifier type</i>
1HFGU	Uganda	Geographical
2ACSC	Icelandic	Language
3MD	16th century, c 1500 to c 1599	Historical period
4GH	For International GCSE (IGCSE)	Educational purpose
5AG	Interest age: from c 6 years	Interest
6BA	Baroque	Artistic style

And finally there are 'national extensions' within the qualifiers. The extension codes are arranged so that national extensions can be truncated to leave a meaningful 'global level' qualifier:

<i>Code</i>	<i>Heading</i>	<i>Truncated</i>	<i>Heading</i>
1DNS-SE-BH	Västergötland	1DNS	Sweden
3MPBGJ-ES-B	España: Guerra civil (1936–1939)	3MPBGJ	c 1930 to c 1939
4Z-UK-SD	For Scottish Curriculum	4Z	For specific national

	National 5		curricula
5HC-US-A	US Independence Day	5HC	Holidays and celebrations

In principle, the headings can be expressed in any language – dentistry (MKE) can also be Zahnheilkunde, odontología or طب الأسنان – and the codes remain language-independent. And as well as the codes shown in the examples above, *Thema* categories and qualifiers will also have persistent URIs that can be used in linked data applications, and the scheme will be published online as SKOS.

One book may be classified in several categories if necessary, and with several qualifiers, and the *Thema* codes and qualifiers for a particular book or product can be embedded within industry-standard ONIX metadata files.