INTERNATIONAL STANDARD

ISO
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Terminology policies — Development and implementation

Politiques terminologiques — Élaboration et mise en œuvre

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Foreword

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The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

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ISO 29383 was prepared by Technical Committee ISO/TC 37, *Terminology and other language and content resources*, Subcommittee SC 1, *Principles and methods*.

This International Standard is based in parts on the recommendations given in the document *Guidelines for Terminology Policies: formulating and implementing terminology policy in language communities*, published by the United Nations Educational, Scientific and Cultural Organization (UNESCO) in 2005.

Introduction

This International Standard is designed for policy makers working in different environments, from language planning to for-profit companies.

The requirements concerning the development and implementation of a terminology policy can differ tremendously in these environments as well as from case to case. No two situations are exactly alike and, even in a seemingly homogenous context, each terminology policy is necessarily individual and custom-made. This International Standard therefore aims to provide guidance on general principles for the design of an individual policy to be tailored to a specific set of circumstances. It does so by recommending a variety of actions that have proven to be helpful in different situations. Some of these recommendations will be essential in any policy environment, while others may not be relevant.

Terminology policies can take very different forms, depending on the context. In a national context, a terminology policy can take the form of a legal document or, at least, part of such, for instance of a language, education or information policy. Similarly, the terminology policy within a large non-governmental or intergovernmental organization may be complex since it has to address a very complex and political situation and various levels of interoperability (cultural, political, semantic, …). In private corporations and smaller organizations, a terminology policy usually takes the form of guidelines or references for terminology management, workflow and the use of technology to support it; it is usually presented in a short document, often not even referring to terminology as such. Distinctions between these vary and what is imperative in one company, community or organization, may be irrelevant in another. Due to the ever-increasing interlinking of public and private endeavours, the high degree of diversity of organizational or institutional organizations, and rapidly changing environments, it is helpful to have all aspects included in one standard.

Terminology policies — Development and implementation

1   Scope

This International Standard provides policy makers in governments, administration, non-profit and commercial organizations with guidelines and a methodology for the development and implementation of a comprehensive policy or strategy concerning the planning and management of terminology.

This International Standard defines key concepts and describes scenarios and environments which may require different kinds of terminology policies. It also places terminology policies in the broader context of institutional strategic frameworks.

2   Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 1087-1, *Terminology — Vocabulary — Part 1: Theory and application*

3   Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 1087-1 and the following apply.

3.1
planning
act or process of preparing a detailed proposal, developed in advance, for doing or achieving something

3.2
strategic plan
comprehensive, integrative programme that considers, at a minimum, the future of current decisions, overall policy and organizational development, representing what must be done in order to achieve long-term objectives and goals

3.3
terminology planning
activities aimed at developing, improving, implementing and disseminating the terminology of a subject field

NOTE   Terminology planning involves all aspects of terminology work and has among other objectives the objective of achieving vocabulary control through such normative documents as thesauri and terminology standards.

[ISO 1087-1:2000, definition 3.6.4]

3.4
policy
set of principles and strategies which guide a course of action for the achievement of a given goal

**3.5
terminology policy**
policy formulated at the level of decision-making in a language, domain or professional community, with the aim of developing or regulating emerging or existing terminologies for various purposes

**3.6
terminology policy implementation**
all efforts to gain acceptance of the terminology policy

**3.7
terminology product**
product that supports special language use or the field of terminology

NOTE Products that support special language use refer to dictionaries, databases, and other products for the dissemination of specialized terminology while products that support the field of terminology refer to journals, training manuals, tools, etc.

[ISO 22128:2008, definition 3.13]

**3.8
language community**
community of people defined through common use of a shared linguistic code and cultural specifications

NOTE Language communities are not necessarily confined within geopolitical boundaries and may be distributed in several, sometimes distant, locales within a region, country, continent or globally.

**3.9
linguistic norm**
set of language conventions which is considered to be the shared linguistic standard of a language community

NOTE There may be many kinds of variations (such as dialects) whose conventions deviate from the linguistic norm.

**3.10
language engineering**
subject field dealing with natural language processing (NLP)

NOTE Sometimes erroneously used synonymously with language planning.

**3.11
language planning**
planning activity involving a deliberate effort to positively influence the function, structure or acquisition of a language or language variety within a speech community

**3.12
status planning**
part of language planning that concerns the official designation and regulation of the status of a language or languages in society at large or in particular domains or contexts

**3.13
corpus planning**
part of language planning that concerns the development and standardization of the corpus of a language

NOTE Corpus planning activities include the standardization and recording of orthography, development of a standard variety, standardization of grammar, standard pronunciation rules, development of a writing system, development of the lexicon (including special lexicon), and strategic dissemination of these standards among the language community.

**3.14
acquisition planning**
part of language planning that concerns the goals, strategy and methodology for the institutionalized teaching and learning of languages in a society

NOTE These may be minority, majority or neighbouring languages or international lingua francas.

4 Language planning and terminology planning

4.1 General

Terminology planning and language planning are two complementary activities. On the one hand, terminology planning is an integral part of most language planning. On the other hand, it can be an activity of an individual organization for internal strategic ends and not necessarily related to language planning at all. In most cases, terminology planning both informs and is informed in turn by existing language planning. The degree of the interdependency between terminology planning and language planning varies according to the specific circumstances of the language community.

4.2 Language planning

Language planning consists of the conscious efforts made by a government, agency or other entity in order to affect strategically and positively the structure or function of a language or languages through politically-informed forward-looking management of languages and their use both in regard to language status determination and language development. It comprises of a mixture of methods and approaches, including:

— the determination of the status of a language in a society at large, in a certain domain or context (status planning);

— the linguistic codification of a language in order to establish a linguistic norm, the development of language resources (including text corpora, speech corpora, lexicographical data and, to some extent, terminological information), the development or recording of literary traditions and sources (corpus planning);

— the development of a language education policy (acquisition planning);

— translation strategies, etc.

The major focus of language planning, therefore, is the conscious development of a language to improve communication in a language community or society at large, or to strengthen the status of the language of a linguistic community existing within a larger community.

4.3 Terminology planning

Terminology planning results in the development of resources to support the representation of domain knowledge (concepts) and the use of such representation to ensure successful and unhindered communication within and across domains, including:

— terminology generation;

— terminology use, documentation, recording and processing;

— knowledge transfer;

— terminology transfer (e.g. through training, when the medium of instruction is another language);

— terminology implementation and implantation (e.g. through technology and knowledge transfer or via the media);

— translation, interpreting and localization.

Domain-specific conventions of concept representation may comprise not only linguistic representations of concepts (i.e. terms and appellations), but also several kinds of non-linguistic representations of concepts (graphic signs, formulae, alphanumeric symbols, illustrations, diagrams, icons, gestures, etc.). These non-linguistic representations have to be taken into account as well.

Terminology planning shall be based as much as possible or feasible on the existing linguistic norm. The linguistic norm is an informal standard form of the language used by all groups and sectors of a language community or groups of language communities of a country or region. Communication patterns in certain domains may not entirely conform to the linguistic norm of the general language from which they are derived or in which they are embedded (e.g. bioscience, chemistry).

Terminology planning shall comply with the needs and requirements of specific domains and applications, including:

— high level of abstraction (e.g. chemical formulae);

— strict rules of term formation (e.g. biological nomenclatures);

— restricted language with high levels of standardization (e.g. risk communication, aviation industry, military communication);

— lesser need for standardization, high occurrence of synonymy (e.g. social sciences, marketing, business, humanities, literature);

— cultural taboos (e.g. health care, disease/epidemics prevention);

— regional dialectic variation (e.g. public notices).

Language for special purposes (LSP) has a strong influence on general language and vice versa. There is a large area of overlap between language and terminology planning. Language planning includes the development of the lexicon (including special lexicon) of a language. At the same time, domain communication consists largely of terms, i.e. linguistic representations of concepts, for the most part constituting the special lexicon of a particular language. The essential difference between the two concepts hence lies in the point of view of the planner and the ultimate focus and goal of the planning activity.

Terminology planning can be part of other planning activities, such as:

— information planning (e.g. knowledge management, information and documentation strategies);

— education planning (e.g. pre-schooling, primary and higher education);

— scientific-technical innovation planning;

— information and communication technology (ICT) planning;

— marketing planning (e.g. of a company);

and is crucial in the following domains:

— signage;

— secondary and tertiary scientific education;

— vocational training;

— health, environmental and risk communications;

— corporate language;

— administration and e-government;

— legal communication, laws and treaties;

— knowledge engineering;

— human language technologies;

— official forms and documents;

— tourism and travel industry;

— communications media;

— scientific or technical publications, guide books, brochures;

— support for translation industry.

Terminology planning is employed to develop and standardize terminology and terminological phraseology in support of the above and to guarantee overall efficient domain communication and knowledge transfer.

5 Formulating and implementing a terminology policy

Terminology planning should lead to the generation of comprehensive and integrative terminology policies that are informed by the requirements, and address the needs of the specific environment and domain. The degree of specific detail is determined by scale, purpose and environment of the policy. Often, terminology policies concern the harmonization of overlapping or conflicting policies.

Key success factors for terminology policies include them being:

— evidence-based;

— visionary (long-term view);

— based on standards and quality management;

— support driven (top-down); participatory (bottom-up);

— sustainable;

— consistent and forceful;

— participatory and empowering;

— transparent and informed;

— geared towards capacity building.

From the perspective of potential user groups, terminology policies can be classified in terms of

a) national, regional and sub-national terminology policies,

b) corporate terminology policies:

    1) commercial enterprises;

    2) non-profit organizations (NGOs), intergovernmental organizations (IGOs).

They may be implemented within the framework of a national language policy or be driven by linguistic problems surfacing as a result of a corporate merger, by temporary endeavours (such as individual projects), corporate language design, or by coordination of intra- and inter-organizational efforts, etc.