



SLOVENSKI STANDARD
SIST ISO 21127:2017
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Informatika in dokumentacija - Referenčna ontologija za izmenjavo informacij o kulturni dediščini

Information and documentation -- A reference ontology for the interchange of cultural heritage information

iTeh STANDARD PREVIEW

Information et documentation -- (Une ontologie de référence pour l'échange d'informations du patrimoine culturel)

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97.195	Umetniški in obrtniški izdelki. Kulturne dobrine in kulturna dediščina	Items of art and handicrafts. Cultural property and heritage

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Second edition
2014-10-15

**Information and documentation — A
reference ontology for the interchange
of cultural heritage information**

*Information et documentation — Une ontologie de référence pour
l'échange d'informations du patrimoine culturel*

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ISO 21127:2014(E)**Foreword**

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT) see the following URL: [Foreword - Supplementary information](#)

The committee responsible for this document is ISO/TC 46, *Information and documentation*, Subcommittee SC 4, *Technical interoperability*, in collaboration with the International Council of Museums Committee for Documentation (ICOM CIDOC).

This second edition cancels and replaces the first edition (ISO 21127:2006), which has been technically revised.

Introduction

This International Standard is the culmination of more than a decade of standards development work by the International Committee for Documentation (CIDOC) of the International Council of Museums (ICOM). Work on this International Standard began in 1996 under the auspices of the ICOM-CIDOC Documentation Standards Working Group. The document¹⁾ provided by CIDOC formed the basis for ISO 21127 which was first published in 2006. While the initial impetus for the work came from the museum community, it has since spread to encompass other types of cultural heritage institution. This International Standard has been appropriated and extended to meet the needs of other institutions dealing with cultural heritage.

The primary purpose of this International Standard is to offer a conceptual basis for the mediation of information between cultural heritage organizations such as museums, libraries, and archives. This International Standard aims to provide a common reference point against which divergent and incompatible sources of information can be compared and, ultimately, harmonized.

ISO 21127 is an ontology²⁾ for cultural heritage information: a formal representation of the conceptual scheme, or “world view”, underlying the database applications and documentation systems that are used by cultural heritage institutions. It is important to note that this International Standard aims to clarify the logic of what cultural heritage institutions do in fact document; it is not intended as a normative specification of what they *should* document. The primary role of this International Standard is to enable information exchange and integration between heterogeneous sources of cultural heritage information. It aims to provide the semantic definitions and clarifications needed to transform disparate, localized information sources into a coherent global resource, be it within an institution, an intranet, or on the Internet.

The specific aims of this International Standard are to

- serve as a common language for domain experts and IT developers when formulating requirements,
- serve as a formal language for the identification of common information contents in different data formats; in particular to support the implementation of automatic data transformation algorithms from local to global data structures without loss of meaning. These transformation algorithms are useful for data exchange, data migration from legacy systems, data information integration, and mediation of heterogeneous sources,
- support associative queries against integrated resources by providing a global model of the basic classes and their associations to formulate such queries, and
- provide developers of information systems with a guide to good practice in conceptual modelling.

The ISO 21127 ontology is expressed as a series of interrelated concepts with definitions. This presentation is similar to that used for a thesaurus. However, the ontology is not intended as a terminology standard and does not set out to define the terms that are typically used as data in cultural heritage documentation. Although the presentation provided here is complete, it is an intentionally compact and concise presentation of the ontology’s 86 classes and 137 unique properties. It does not attempt to articulate the inheritance of properties by subclasses throughout the class hierarchy (this would require the declaration of several thousand properties, as opposed to 137). However, this definition does contain all the information needed to infer and automatically generate a full declaration of all properties, including inherited properties.

1) The CIDOC CRM Special Interest Group continues to maintain a version of this original document, usually known as the “CIDOC Conceptual Reference Model” or CIDOC CRM.

2) In the sense used in computer science, i.e. it describes in a formal language the relevant explicit and implicit concepts and the relationships between them.

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Information and documentation — A reference ontology for the interchange of cultural heritage information

1 Scope

This International Standard establishes guidelines for the exchange of information between cultural heritage institutions. In simple terms, this can be defined as the information managed by museums, libraries, and archives.

A more detailed definition can be articulated by defining both the intended scope, a broad and maximally inclusive definition of general principles, and the practical scope, which is defined by reference to a set of specific museum documentation standards and practices.

The intended scope of this International Standard is defined as the exchange and integration of heterogeneous scientific documentation relating to museum collections. This definition requires further elaboration.

- The term “scientific documentation” is intended to convey the requirement that the depth and quality of descriptive information that can be handled by this International Standard need to be sufficient for serious academic research. This does not mean that information intended for presentation to members of the general public is excluded, but rather that this International Standard is intended to provide the level of detail and precision expected and required by museum professionals and researchers in the field.
- The term “museum collections” is intended to cover all types of material collected and displayed by museums and related institutions, as defined by ICOM³⁾. This includes collections, sites, and monuments relating to fields such as social history, ethnography, archaeology, fine and applied arts, natural history, history of sciences and technology.
- The documentation of collections includes the detailed description of individual items within collections, groups of items, and collections as a whole. This International Standard is specifically intended to cover contextual information (i.e. the historical, geographical, and theoretical background that gives museum collections much of their cultural significance and value).
- The exchange of relevant information with libraries and archives, and harmonization with their models, falls within the intended scope of this International Standard.
- Information required solely for the administration and management of cultural institutions, such as information relating to personnel, accounting, and visitor statistics, falls outside the intended scope of this International Standard.

The practical scope⁴⁾ of this International Standard is the set of reference standards for museum documentation that have been used to guide and validate its development. This International Standard covers the same domain of discourse as the union of these reference documents; consequently, for any data that is correctly encoded in accordance with any of these reference documents, a form of encoding can be created that is both compatible with the current standard and which entails no semantic loss.

2 Conformance

Users intending to take advantage of the semantic interoperability offered by this International Standard should ensure conformance with the relevant data structures. Conformance pertains either to data

3) The ICOM Statutes provide a definition of the term “museum” at <<http://icom.museum/statutes.html#2>>.

4) The practical scope of the CIDOC CRM, including a list of the relevant museum documentation standards, is discussed in more detail on the CIDOC CRM website at <<http://cidoc-crm.org/scope.html>>.

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to be made accessible in an integrated environment or intended for transport to other environments. Any encoding of data in a formal language that preserves the relations of the classes, properties, and inheritance rules defined by this International Standard, is regarded as conformant.

Conformance with this International Standard does not require complete matching of all local documentation structures, nor that all concepts and structures present in this International Standard be implemented. This International Standard is intended to allow room both for extensions, needed to capture the full richness of cultural information, and for simplification, in the interests of economy. A system will be deemed partially conformant if it supports a subset of subclasses and subproperties defined by this International Standard. Designers of the system should publish details of the constructs that are supported.

The focus of this International Standard is the exchange and mediation of structured information. It does not require the interpretation of unstructured (free text) information into a structured, logical form. Unstructured information is supported, but falls outside the scope of conformance considerations.

Any documentation system will be deemed conformant with this International Standard, regardless of the internal data structures it uses; if a deterministic logical algorithm can be constructed, that transforms data contained in the system into a directly compatible form without loss of meaning. No assumptions are made as to the nature of this algorithm. "Without loss of meaning" signifies that designers and users of the system are satisfied that the data representation corresponds to the semantic definitions provided by this International Standard.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

3.1

class

category of items that share one or more common traits

Note 1 to entry: Class traits serve as criteria to identify items that belong to the class. These traits need not be explicitly formulated in logical terms, but can be described in a text (called a scope note) that refers to a common conceptualization of domain experts. The sum of these traits is called the intension of the class. A class can be the domain or range of none, one, or more properties formally defined in a model. The formally defined properties need not be part of the intension of their domains or ranges; such properties are optional. An item that belongs to a class is called an instance of this class. A class is associated with an open set of real-life instances known as the extension of the class. Here, "open" is used in the sense that it is generally beyond our capabilities to know all instances of a class in the world and, indeed, that the future can bring new instances into being at any time (open world). Therefore, a class cannot be defined by enumerating its instances. A class plays a role analogous to a grammatical *noun*, and can be completely defined without reference to any other construct (unlike properties, which need to have an unambiguously defined domain and range). For example, "Person" is a class. A "Person" can have the property of being a *member of* a "Group", but this is not a necessary condition for being a "Person". We will never know all "Persons" who have lived in the past, and there will be more "Persons" in the future. Classes are usually organized as a *class hierarchy*. The relationship between a subclass and its superclass is known as the *IsA* relationship (a concatenation of the words "is a"). For example, a ship *IsA* vehicle.

3.2

complement

(of a class A) set of all instances of its superclass, B, that are not instances of class A

Note 1 to entry: In terms of set theory, the complement of a class is the extension of the superclass minus the extension of the class. Compatible extensions of this International Standard need not declare any class as the complement of one or more other classes. To do so would violate the goal of describing an open world. For example, for all possible cases of human *gender*, "male" need not be declared as the complement of "female" or vice versa.

3.3

disjoint

having no common instances in any possible world

Note 1 to entry: Classes are disjoint if the intersection of their extensions is necessarily an empty set.

Note 2 to entry: See also [5.4](#).

3.4 domain

class for which a property is formally defined

Note 1 to entry: Instances of a property are applicable to instances of its domain class. A property needs to have exactly one domain, though the domain class can always contain instances for which the property is not instantiated. The domain class is analogous to the grammatical *subject* of a phrase while the property is analogous to the *verb*. Which class is selected as the domain and which as the range is arbitrary, as is the choice between active or passive voice. Property names in ISO 21127 are designed to be semantically meaningful and grammatically correct when read from domain to range. The inverse property name, given in parentheses, is also designed to be semantically meaningful and grammatically correct when read from range to domain.

3.5 extension

set of all real life instances belonging to a class that fulfil the criteria of its intension

Note 1 to entry: The extension of a class is an “open” set in the sense that it is generally beyond our capabilities to know all instances of a class in the world. The future can bring new instances into being at any time (open world). An information system can, at any point in time, refer to some instances of a class, which form a subset of its extension.

Note 2 to entry: See also [5.6](#).

3.6 inheritance

duplication of properties from a class to its subclasses

Note 1 to entry: Inheritance of properties from superclasses to subclasses entails that if an item *x* is an instance of a class *A*, then all properties that need hold for the instances of any of the superclasses of *A* need also hold for item *x*, and that all optional properties that can hold for the instances of any of the superclasses of *A* can also hold for item *x*.

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3.7 instance

item having properties that meet the criteria of the intension of the class

Note 1 to entry: “The Mona Lisa” is an instance of the class of *E22 Man-Made Object*. An instance of a property is a factual relation between an instance of the domain and an instance of the range of the property that matches the criteria of the intension of the property. For example, “the Louvre is current owner of the Mona Lisa” is an instance of the property “is current owner of”. One aspect of the open world assumption is that the number of class instances declared in a given information system is usually less than the total number of instances in the real world. You, for example, are an instance of “person”, but you are not mentioned in all information systems describing “persons”.

3.8 intension

intended meaning of a class

Note 1 to entry: The intension of a class consists of one or more common traits shared by all instances of the class. These need not be explicitly formulated in logical terms, but can simply be described in a text (a scope note) that refers to a conceptualization shared by domain experts.

3.9 interoperability

capability of different information systems to communicate some of their contents

Note 1 to entry: Interoperability can imply that

- a) two systems can exchange information, and/or
- b) multiple systems can be accessed with a single method.

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Note 2 to entry: Generally, *syntactic* interoperability is distinguished from *semantic* interoperability. *Syntactic* interoperability means that the information encoding and the access protocols of the relevant systems are compatible, so that information can be processed as described above without error. However, syntactic interoperability alone does not ensure that each system processes the data in a manner consistent with the intended meaning. For example, one system may contain a table called “actor” while another system uses the name “agent”. Even if data from the two tables can be combined in a common data format, it will nonetheless remain separated unless the semantic equivalence of the two tables is established. Semantic interoperability requires more than compatible data formats. ISO 21127 presupposes existing *syntactic* interoperability and is concerned only with adding *semantic* interoperability.

3.10 monotonic

(of a knowledge base) having a set of conclusions derived through inference rules that does not reduce, irrespective of whatever additional propositions can be inserted

Note 1 to entry: Monotonic reasoning is a term derived from knowledge representation. In practical terms, as experts enter correct statements to an information system, the system need not regard any of the existing statements as invalid. The ISO 21127 ontology is designed for monotonic reasoning and so enables conflict-free merging of huge stores of knowledge.

Note 2 to entry: See also [5.1](#).

3.11 multiple inheritance

possibility for a class to have more than one immediate superclass

Note 1 to entry: The extension of a class with multiple immediate superclasses is a subset of the intersection of all extensions of its superclasses. The intension of a class with multiple immediate superclasses extends the intensions of all its superclasses, i.e. its *traits* are more restrictive than any of its superclasses. If multiple inheritance is used, the resulting “class hierarchy” is a directed graph and not a tree structure. If it is represented as an indented list, then some classes will inevitably be repeated at different positions in the hierarchy. For example, “person” is both an “actor” and a “biological object”.

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3.12 open world

assumption that the information stored in a knowledge base is incomplete with respect to the universe of discourse it aims to describe

Note 1 to entry: A term derived from knowledge representation. The incompleteness of a knowledge base can be due to the inability of the maintainer to provide sufficient information, or to more fundamental problems of cognition in the system’s domain. Such problems are characteristic of cultural information systems since our records about the past are necessarily incomplete. In addition, some items cannot be clearly assigned to a given class. In particular, the absence of a certain trait for an item described in the system does not necessarily entail that the item does not possess the trait. For example, if one item is described as “biological object” and another as “physical object”, this does not imply that the latter is not also a “biological object”. Therefore, complements of a class with respect to a superclass cannot be *derived* in general from an information system based on the open world assumption.

3.13 primitive concept

concept that is declared and for which the meaning is clear, but which cannot be derived from other concepts

Note 1 to entry: Primitive concept is a term derived from knowledge representation. For example, *mother* can be described as a female who has given birth to a child, so *mother* is not a primitive concept. *Event* however is a primitive concept. ISO 21127 is composed primarily of primitive concepts.

3.14**property**

named characteristic of a class to which values can be assigned

Note 1 to entry: A property is characterized by an intension, which is conveyed by a scope note. A property plays a role analogous to a *verb* in that it needs to be defined with reference to both a domain and range, which are analogous to the *subject* and *object* in a phrase (unlike classes, which can be defined independently). Which class is selected as the domain and which as the range, is arbitrary, as is the choice between active and passive voice. In other words, a property can be interpreted in both directions, with two distinct but related interpretations. For example, “E24 Physical man-made thing *depicts* E1 Entity” is equivalent to “E1 Entity *is depicted by* E24 Physical man-made thing”. Properties can themselves have properties that relate to other classes (This feature is used in this model only in order to describe dynamic subtyping of properties.) Properties can also be *specialized* in the same manner as classes, resulting in *IsA* relationships between subproperties and their superproperties.

3.15**query**

request for information from an information system expressed so that the response can be calculated automatically

3.16**query containment**

query *X* contains another query *Y* if, for each possible population of a database, the answer set to query *X* also contains the answer set to query *Y*

Note 1 to entry: If query *X* and *Y* were classes, then *X* would be a superclass of *Y*.

3.17**range**

class that comprises all the potential values of a property

Note 1 to entry: The value of a property at a given time is an instance of the class assigned as the range of the property. A property is intended to have exactly one range class. A rough analogy can be drawn between the subject-verb-object structure of a basic proposition and the domain-property-range structure defined in the standard. The range class corresponds to the grammatical object. Which class is selected as domain, and which as range, is arbitrary, as is the choice between active and passive voice. Property names in ISO 21127 are designed to be semantically meaningful and grammatically correct when read from domain to range. The inverse property name, given in parentheses, is designed to be semantically meaningful and grammatically correct when read from range to domain.

3.18**scope note**

textual description of the intension of a class or property

Note 1 to entry: Scope notes are not formal modelling constructs but are provided to help explain the intended meaning and application of the classes and properties. Basically, they refer to a conceptualization shared by domain experts and disambiguate different possible interpretations. Illustrative examples of classes and properties are also provided with the scope notes for explanatory purposes.

3.19**shortcut**

formally defined single property that represents a *deduction* or *join* of a data path in the ontology

Note 1 to entry: The scope notes of shortcut properties provide a verbal description of the equivalent deduction. Shortcuts are introduced for those cases where common documentation practice refers only to the deduction rather than to the fully developed path. For example, museums often only record the “dimension” of an object without documenting the E16 measurement that observed it. The International Standard allows shortcuts as cases of less detailed knowledge, while preserving in its schema the relationship to the full information.

Note 2 to entry: See also [5.3](#).

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3.20

strict inheritance

properties inheritance that allows no exceptions

Note 1 to entry: Some systems can declare that “elephants are grey” and regard a white elephant as an exception. Under strict inheritance rules it would hold that if all elephants were indeed grey, then a white elephant could not be an elephant. Obviously not all elephants are grey; being grey is not part of the intension of the concept elephant but an optional property. The International Standard applies strict inheritance as a normalization principle.

3.21

subclass

specialization of another class, i.e. the superclass

Note 1 to entry: A subclass inherits *all* the properties of its superclass (i.e. strict inheritance), in addition to having none, one, or more additional properties of its own. A subclass can have more than one immediate superclass, and consequently inherits the properties of all of its superclasses (i.e. multiple inheritance). A subclass has an *IsA* relationship to its superclass(es): every instance of the subclass is also, by definition, an instance of the superclass(es). For example, every “person” *IsA* “biological object”.

3.22

subproperty

specialization of another property, i.e. the superproperty

Note 1 to entry: All instances of a subproperty are also instances of its superproperty. The intension of a subproperty extends the intension of its superproperty, i.e. its *traits* are more restrictive than that of its superproperty. The domain of a subproperty is a subclass of the domain of its superproperty. The range of a subproperty is a subclass of the range of its superproperty. Instances of a subproperty inherit the definition of *all* of the properties declared for its superproperty without exceptions (strict inheritance), in addition to having none, one, or more properties of their own.

Note 2 to entry: A subproperty can have more than one immediate superproperty and consequently inherits the properties of all of its superproperties (multiple inheritance). The *IsA relationship* or *specialization* between two or more properties gives rise to the structure we call a *property hierarchy*. The *IsA relationship* is transitive and shall not be cyclic. In some object-oriented languages, including C++ there is no equivalent to the specialization of properties.

3.23

superclass

generalization of one or more other classes, i.e. the subclasses

Note 1 to entry: A superclass *subsumes* all instances of its subclasses, and can also have additional instances that do not belong to any of its subclasses. The intension of the superclass is less restrictive than any of its subclasses. The *subsumption relationship* or *generalization* is the inverse of the *IsA relationship* or *specialization*. In some contexts (e.g. the programming language C++) the term *parent class* is used synonymously with superclass. For example, “biological object *subsumes* person” is synonymous with “biological object is a *superclass* of person”. Fewer properties are needed to identify an item as a “biological object” than to identify it as a “person”.

3.24

superproperty

generalization of one or more other properties, i.e. the subproperties

Note 1 to entry: A superproperty *subsumes* all instances of its subproperties, and can also have additional instances that do not belong to any of its subproperties. The intension of the superproperty is less restrictive than any of its subproperties. The *subsumption relationship* or *generalization* is the inverse of the *IsA relationship* or *specialization*.

4 Structure and presentation

4.1 Property quantifiers

Quantifiers for properties are provided for the purpose of semantic clarification only, and should *not* be treated as implementation recommendations. This International Standard has been designed

to accommodate alternative opinions and incomplete information; *all* properties should therefore be implemented as optional and repeatable for their domain and range ["many to many (0,n:0,n)"]. The term "cardinality constraints" is avoided here as it typically pertains to implementations.

[Table 1](#) lists all possible property quantifiers occurring in this International Standard according to their notation, together with a textual explanation. In order to provide optimal clarity, two widely accepted notations are used in this International Standard, i.e. one verbal, the other numerical. The verbal notation uses phrases such as "one to many", and the numerical notation expressions such as "(0,n:0,1)". The terms "one", "many", and "necessary" are fairly intuitive; the term "dependent" is less obvious. It denotes a situation where a range instance cannot exist without an instance of the respective property. In other words, the property is "necessary" for its range.

Table 1 — Property quantifiers

Quantifier	Description
many to many (0,n:0,n)	Unconstrained: an individual domain instance and range instance of this property can have zero, one, or more instances of the property. In other words, the property is optional and repeatable for its domain and range.
one to many (0,n:0,1)	An individual domain instance of this property can have zero, one, or more instances of the property, but an individual range instance cannot be referenced by more than one instance of this property. In other words, the property is optional for its domain and range, but repeatable for its domain only. This situation is sometimes called a "fan-out".
many to one (0,1:0,n)	An individual domain instance of this property can have zero or one instance of the property, but an individual range instance can be referenced by zero, one, or more instances of the property. In other words, the property is optional for its domain and range, but repeatable for its range only. This situation is sometimes called a "fan-in".
many to many, necessary (1,n:0,n)	An individual domain instance of this property can have one or more instances of the property, but an individual range instance can have zero, one, or more instances of the property. In other words, the property is necessary and repeatable for its domain, and optional and repeatable for its range.
one to many, necessary (1,n:0,1)	An individual domain instance of this property can have one or more instances of the property, but an individual range instance cannot be referenced by more than one instance of the property. In other words, the property is necessary and repeatable for its domain, and optional but not repeatable for its range. This situation is sometimes called a "fan-out".
many to one, necessary (1,1:0,n)	An individual domain instance of this property shall have exactly one instance of the property, but an individual range instance can be referenced by zero, one, or more instances of the property. In other words, the property is necessary and not repeatable for its domain, and optional and repeatable for its range. This situation is sometimes called a "fan-in".
one to many, dependent (0,n:1,1)	An individual domain instance of this property can have zero, one, or more instances of the property, but an individual range instance shall be referenced by exactly one instance of the property. In other words, this property is optional and repeatable for its domain, but necessary and not repeatable for its range. This situation is sometimes called a "fan-out".
one to many, necessary, dependent (1,n:1,1)	An individual domain instance of this property can have one or more instances of the property, but an individual range instance shall be referenced by exactly one instance of the property. In other words, the property is necessary and repeatable for its domain, and necessary but not repeatable for its range. This situation is sometimes called a "fan-out".
many to one, necessary, dependent (1,1:1,n)	An individual domain instance of this property shall have exactly one instance of the property, but an individual range instance can be referenced by one or more instances of the property. In other words, this property is necessary and not repeatable for its domain, and necessary and repeatable for its range. This situation is sometimes called a "fan-in".