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Terminology policies — Development and implementation

Politiques terminologiques — Élaboration et mise en œuvre

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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 of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 37, *Language and terminology*, Subcommittee SC 1, *Principles and methods*.

This second edition cancels and replaces the first edition (ISO 29383:2010), which has been technically revised.

The main changes compared to the previous edition are as follows:

— updated terms and definitions based upon new editions of referenced standards;

— revised terminology policy development process;

— updated examples and scenarios of terminology policy.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

This document is designed for policy makers working in different environments, from language planning institutions to profit organizations.

The requirements concerning the development and implementation of a terminology policy can differ 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 document therefore aims to provide guidance on general principles for the design of an individual policy to be tailored to a specific set of circumstances and demands. 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 information policy. Similarly, the terminology policy within a large non-governmental or intergovernmental organization can be complex since it has to address a very complex situation and various levels of interoperability (cultural, political, semantic, etc.). In private corporations and smaller organizations, a terminology policy usually takes the form of guidelines 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, can 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.

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Terminology policies — Development and implementation

1 Scope

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

This document defines key concepts and describes scenarios and environments that can require different kinds of terminology policies. It also places terminology policies in the broader context of institutional strategic frameworks.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements 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 1087:2019, *Terminology work amd terminology science — Vocabulary*

3 Terms and definitions

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

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at http://www.electropedia.org/

3.1
terminology planning
terminology work (3.14) aimed at developing, improving, implementing and disseminating the terminology of a domain or a subject

Note 1 to entry: 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.

[SOURCE: ISO 1087:2019, 3.5.3]

3.2
terminology policy
set of principles and strategies used as a basis for developing and regulating terminology for a specific language(s) or domain(s)

3.3
terminology policy implementation
set of activities aimed at executing a *terminology policy* (3.2)

3.4
terminology resource
terminological data collection
TDC
collection of terminological entries

Note 1 to entry: Terminology resources can be in paper or electronic format, e.g. paper dictionaries or *glossaries*, CDs, DVDs, databases or termbanks.

[SOURCE: ISO 1087:2019, 3.7.1]

3.5
linguistic norm
set of language conventions that is considered to be the shared standard of a *language community* (3.10)

Note 1 to entry: There can be many kinds of variations (such as dialects) whose conventions deviate from the linguistic norm.

Note 2 to entry: Different linguistic norms can also be applicable to the same language (e.g. when the same language is used in different countries, namely BrE vs. AmE, etc.).

3.6
language planning
set of activities involving measures to influence the function, structure or acquisition of a language or language variety within a *language community* (3.10)

3.7
status planning
part of *language planning* (3.6) that concerns the official designation of a language and the regulation of its status in a society at large or in particular domains or contexts

3.8
corpus planning
part of *language planning* (3.6) that concerns the development and standardization of a language

Note 1 to entry: Corpus planning includes the standardization and recording of orthography, development of a standard variety, grammar, pronunciation rules, development of a writing system, and lexicon (including special lexicon).

3.9
acquisition planning
part of *language planning* (3.6) that concerns the goals, strategies and methodologies for the institutionalized teaching and learning of languages in a society

Note 1 to entry: Acquisition planning can include the use of official, minority, majority or neighbouring languages or international lingua francas.

3.10
language community
community of people defined through common use of shared *linguistic norms* (3.5) and cultural specifications

Note 1 to entry: Language communities are not necessarily confined within geopolitical boundaries and can be distributed in several, sometimes distant *locales* (3.17) within a region, country, continent or globally.

[SOURCE: ISO 16354:2013, 3.1.11, modified - Definition and Note 1 to entry substantially modified; example deleted.]

3.11
complementary information
CI
information supplementary to that described in terminological entries and shared across the *terminological data collection* (3.13)

Note 1 to entry: Domain hierarchies, institution descriptions and bibliographical references.

[SOURCE: ISO 16642:2017, 3.2, modified - Note 1 to entry transformed into "examples"; "references to text corpora" removed from the examples.]

3.12
special language
language for special purposes
LSP
natural language used in communication between experts in a domain and characterized by the use of specific linguistic means of expression

Note 1 to entry: The specific linguistic means of expression always include subject-specific terminology and phraseology and also can cover stylistic or syntactic features.

[SOURCE: ISO 1087:2019, 3.1.9]

3.13
terminological data collection
TDC
resource consisting of concepts and their designations with associated metadata and documentary information

[SOURCE: ISO 16642:2017, 3.21, modified - "terminological entries" replaced with "concepts and their designations".]

3.14
terminology work
work concerned with the systematic collection, description, processing and presentation of concepts and their designations

Note 1 to entry: Terminology work is preferably carried out on the basis of established principles and methods. Terminology work includes term extraction, concept harmonization, term harmonization and terminography.

[SOURCE: ISO 1087:2019, 3.5.1, modified - Original Notes 1 and 2 to entry replaced with new Note 1 to entry.]

3.15
terminology management
methods for collecting, maintaining, and accessing terminological data

3.16
terminology management system
software tool specifically designed for collecting, maintaining, and accessing terminological data

[SOURCE: ISO 1087:2019, 3.6.13, modified - "with a metadata structure" deleted after "software tool".]

3.17
locale
unique combination of parameters specifying the language, geographic area, and other cultural, administrative or technical preferences of a given community

[SOURCE: ISO 22274:2013, 3.20]

4 Language planning and terminology planning

4.1 General

Language planning is a broader concept than terminology planning that covers status, corpus and acquisition planning. This process is often associated with planning at government level, but can also be done by non-governmental organisations, private companies and individuals, as language planning goals can vary. In particular, status planning involves the pronouncement of an official/non-official (minority) language(s), national language or a language of communication or a medium of instruction as well as the determination of the functions of such languages. Subsequently, corpus planning is key to the implementation of the chosen languages determined during status planning.

Corpus planning, in this case, focuses on the development of chosen languages, which can be done through graphization. The process of graphization involves the development, selection and modification of orthographic conventions of a language. In addition to graphization, corpus planning also involves standardization of spelling and modernization that focuses on lexical expansion of general language and technical vocabulary. These processes often result in new language resources (e.g. glossary lists and technical terms) to ensure quality and consistency in the way terminology is used in specific domains or language communities. Corpus planning is therefore that part of language planning that covers terminology planning. Terminology policies are developed during this planning phase.

Acquisition planning is then critical in ensuring that what has been developed during corpus planning is introduced to the society at national or local level through education systems ranging from primary schools to universities and the media. That is, the implementation and use of new language resources take place during acquisition planning.

4.2 Language planning

Language planning involves deliberate efforts by a government, agency or other entity in order to influence the function, structure or acquisition of a language or language variety in a certain domain or within a language community. Language planning comprises a mixture of approaches, such as:

— 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 resources), the development or recording of literary traditions and sources (corpus planning);

— the development of a language education policy and teaching of a language (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 development;

— terminology use, documentation, recording and processing;

— knowledge transfer;

— terminology transfer (e.g. during training or learning and teaching through the medium of instruction);

— terminology implementation (e.g. through technology or via the media);

— translation, interpreting and localization.

Domain-specific conventions of concept representation can 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 should be based as much as possible or feasible on the existing linguistic norm. The linguistic norm is a 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:

— an appropriate 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);

— high occurrence of synonymy (e.g. engineering, social sciences, economics, humanities, etc.);

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

— regional variation and register variation (e.g. public notices).

Special language 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 are mostly constituted of special lexicon of a particular language.

Terminology planning is also of special concern for pluricentric languages, for example English, French or German, that are official or state languages in many different countries with very different cultures and legal systems. In particular, in the domain of law, pluricentric languages and their treatment in terminology work is a fundamental aspect for the correct transfer of knowledge and for legal certainty.

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, secondary, primary and higher education);

— scientific-academic or innovation planning;

— information and communication technology (ICT) planning; and

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

Terminology planning is also crucial in the following domains:

— secondary and tertiary scientific education and vocational training;

— knowledge engineering (human language technologies);

— environmental, tourism and travel industry;

— administration and e-government;

— corporate communication management (official forms and documents);

— health and risk management;

— legal communication (laws and treaties);

— communications and marketing (signage);

— scientific or technical publications, guide books, brochures; and

— 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.

Successful terminology policies are:

— evidence-based (decisions on policy recommendations should be based on facts gathered during the needs assessment phase);

— visionary (long-term view) (terminology policy should be aligned with the strategic direction and objectives of an organization or country);

— based on standards and quality management (the policy that is being developed should take into consideration the terminology standards and quality management systems that are in place);

— support-driven by top management (top-down: this is where senior managers give policy direction); participatory (bottom-up: involves stakeholders and practitioners engagement in order to get their buy-in in the policy direction to ensure successful implementation of technical resources) (stakeholder engagement process should be empowering and transparent);

— sustainable, consistent and forceful (the policy should be developed with the aim to implement terminology in a consistent manner; the implementation of such policy should be realistic; systems should also be put in place in order to ensure sustainability of such a policy); and

— geared towards capacity building.

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

1)   national, regional and sub-national terminology policies;

   NOTE   Regional here refers to an area/level within a country.

2)   domain/sector terminology policies; and

3)   corporate terminology policies:

   i)   corporations; and

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

Terminology policy can 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.

A policy, unlike an individual project that is limited by time, is a continuous process of planning, implementing and monitoring, evaluating, revising and planning again. Provisions shall therefore be made for it to become ultimately self-sustaining (through capacity and institution building, as well as awareness-raising efforts).

6 Terminology policy development process

6.1 Terminology policy development process model

The following model (see Figure 1) shall be considered in the terminology policy development process.

PHASE I: Needs assessment	PHASE II: Policy formulation and Approval	PHASE III: Implementation	PHASE IV: Policy maintenance
Assessment of the language and terminology environment and existing legislation; Awareness creation, and efforts to obtain official recognition; Recommendation of methodology and available or conceivable procedures; Preparation of preliminary documents; Organization of consultation process.	Drafting the terminology policy proposal; Drafting a plan for the coordination of the terminology policy with other strategic planning policies; Preparation of a plan for implementation; Submission of the (draft) final policy (document and implementation plan); Official approval of the final policy (document and implementation plan).	Overall management of the implementation; Operational and organizational planning of the implementation; Planning of the publicity and promotional activities; Monitoring and evaluation; Publication of results.	Long-term financial support; Business model; Capacity building for revision and continued advocacy; Planning for implementation of adaptations to policy and/or infrastructure; Regular monitoring and evaluation of results of policy implementation; Ongoing awareness raising

Figure 1 — Terminology policy development process model

6.2 PHASE I – Needs assessment

6.2.1 Assessment of language and terminology environment

Terminology policy development and implementation is a highly complex matter. The process should be based on a thorough needs assessment. The needs assessment process should cover the following aspects:

— assessment of the language and terminology environment and of existing legislation;

— activities designed to create awareness of the issues within the society, community or organization, and efforts to obtain official recognition for these activities;

— recommendation of methodology and available or conceivable procedures;

— preparation of fundamental documents;

— stakeholders could include groups or individuals who are affected by or concerned about or interested in the terminology policy (see Annex A, Figure A.1);

— establishment of a network of experts;

— organization of a comprehensive consultation process (e.g. national, regional or organisational); and

— draft assessment document.

An assessment of the language and terminology environments is important in determining gaps in terms of terminology development and facilitation of effective communication processes in the specific domain or a specific language community. The impact of the terminology policy on other policies and strategies within the organisation or in that country should also be assessed. At the same time, the assessment of attitudes of the language community in general towards specific language(s) and their development is also crucial during this phase.

The assessment of the language and terminology environments should be done in order to identify major stakeholders and determine any societal or psychological barriers towards the successful implementation of such a policy. The assessment should also include an analysis of direct and indirect benefits and of the estimated costs implied in the formulation and implementation of the terminology policy. Furthermore, the goals and scope of the terminology policy as well as options for its realization shall be clearly outlined in order to fully assess the situation so that valid conclusions can be drawn. This process can also take the form of meetings, surveys, case studies and analysis of corporate documents, etc.

The needs assessment phase should also include a survey of the regulatory or policy framework with regard to information (constitutional or common law, statutory controls, enacted statutes, guidelines, decrees, etc.). It is useful to show any overlapping inconsistencies or contradictions in existing legal regulations and policies as well as any intended positive contribution to the overall policy framework.

The information collected during the needs assessment phase serves four main purposes:

— to highlight the need for a terminology policy (at national, regional or organizational level);

— to indicate the extent to which professionals and users at large already recognize the need for a terminology policy;

— to identify gaps and inadequacies in existing policies; and

— to support the terminology development process based on results from the needs assessment phase.

6.2.2   Assessment documents

The results of the needs assessment phase should be compiled into a comprehensive document for a variety of reasons, namely for the development of a terminology policy, implementation plan, as well as financial implications for implementing such a policy.

The document should be prepared with the utmost care as it will be reused during the entire policy development, implementation and evaluation process and beyond.

This assessment document should include:

— an introduction to the physical, social, economic and administrative environment;

— an assessment of major language and terminology goals or priorities at national, regional or corporate level;

— an assessment of the socio-economic situation of the language communities involved;

— an assessment of existing language resources, including terminology resources as well as the analysis of the status of terminologies in each language;

— an assessment of major terminology and language institutions, their resources and services;

— an assessment of users: the major types of institutional and individual users, their needs and terminology requirements (see Clause B.2);

— an assessment of the current language policy situation: the scope and coverage of this policy, mechanisms for its formulation and enforcement, and its inadequacies; and

— a summary conclusion stating the need for a (new) terminology policy, outlining its level of recognition and the main constraints associated with its implementation.

The assessment document shall be formulated and presented in a concise manner in order to ensure that it is understood by decision makers, knowledge brokers and facilitators who are not experts in the field of terminology. The document should help these persons recognize the benefit of systematic terminology management and planning for different issues that can affect the organization or language community. If necessary, a third party should be engaged to act as knowledge broker.

The preparation of the assessment document during Phase I serves two main purposes:

— to consolidate the assessment results against existing and/or required language resources and capacities; and

— to provide a basis for a constructive consultation on the issues related to a terminology policy based on these findings.

The design and formulation of the assessment document shall correspond with existing corporate, institutional or cultural conditions or requirements. Depending on the scale and context of the policy, the analysis should be combined into one comprehensive document and provided in different language versions.

6.2.3   Stakeholder consultation

Stakeholder consultation is required for terminology policy at public or organizational level. At public policy level, this should also involve consultation of the language community throughout the entire terminology policy formulation process. This process often requires activities designed to raise awareness and obtain buy-in before any official mandate or approval is granted toward implementation. For policies at organizational level, official support or buy-in by top management is particularly vital for the success of the actual implementation of the policy.

6.2.4   Organization of a community/organization-wide consultation procedure

On completion of the assessment process, a draft policy document shall be submitted for stakeholder consultation at either national, regional, or organizational level. It shall constitute the main working document(s) for consultation at that level, thus securing transparent and participatory work methods.

Such consultations will serve different goals and can take various forms, for example, meetings and surveys (oral and written interviews).

The importance of active contributions from individual stakeholders to the draft policy document and the possible impact on the final policy should be stressed in order to attract participants who would otherwise take a more passive role. The results of the consultations shall be carefully recorded, summarized and integrated into the terminology policy document. All stakeholders, regardless of passive or active contribution, shall be kept informed throughout the process about the progress and results of the consultation.

6.3   PHASE II – Policy formulation and approval

6.3.1   General

The policy formulation and approval phase comprises:

— drafting the final terminology policy document;

— alignment of the terminology policy with other strategic planning objectives and policies;

— preparation of the policy implementation plan;

— presentation of final policy document and implementation plan; and

— decision on the final policy document and implementation plan.

This phase will not in all cases be carried out in such a detailed and explicit manner, but the basic principles will nevertheless apply.

6.3.2 Finalizing the terminology policy proposal

The draft terminology policy proposal shall outline policy objectives, scope, benefits, main stakeholders and the directions for implementing the terminology policy in such a way as to facilitate the effective communication and decision-making processes. The policy's envisaged achievements as well as its limitations should also be clearly outlined.

At this stage, an evaluation process for the individual parts of the draft shall be initiated. This evaluation process shall involve most of the relevant stakeholders who will be involved in implementation of the policy. This serves to reveal any implications/gaps that could have been overlooked, or either underestimated or overestimated.

6.3.3 Coordination of terminology planning with other strategic planning policies

Decision-making and planning processes need data and input from regional, national and international sources. Therefore, the terminology policy shall not be regarded in isolation, but rather as a strategy in coordination with, and supporting, the general development policy of the region, country or organization. The terminology policy proposal should therefore focus on the integration of the following issues:

— alignment of the terminology policy to the overall strategic direction;

— coordination of terminology policy activities with the regional, national or corporate developmental priorities (thus justifying the need for resources and qualification);

— provide guidance to government agencies and private corporations, as well as to NGOs, on the management and planning of resources and services;

— establish a basis for any future review of the terminology policy according to changing circumstances;

— link the terminology policy to scientific-technical translation policies and related policies of managing communication processes (e.g. corporate communication management); and

— highlight the impact of interrelated policies on the terminology policy.

6.3.4 Implementation plan

A draft implementation plan shall accompany the terminology policy proposal.

This plan shall specifically address:

— the selection of suitable strategies to achieve the goals of the terminology policy within a given period of time;

— the assignment of priorities to the various terminology policy issues;

— the allocation of resources for the implementation of work relating to these prioritized issues; and

— a proposal for a coordination mechanism (within the terminology policy and vis-à-vis other policies).

Depending on the scope of the terminology policy and on the complexity of the situation, the implementation plan should be based on preliminary investigations concerning:

— the establishment of a mechanism for the implementation of terminology policy;

— the development of an action plan for the achievement of policy objectives and goals;

— the provision of financial resources for the implementation of activities related to the terminology policy; and

— the design of measures aimed at periodic assessments of and adjustments to the action plan.

6.3.5 Presentation of the final policy and implementation plan

In the terminology policy proposal, the necessary steps shall be elaborated to motivate the professional communities (terminologists, linguists and translators, language practitioners or experts in the language field) concerned to support these activities. The text of the final terminology policy shall be a clearly written and concise document. It shall provide accurate and up-to-date information on the issues that require the attention of political or corporate decision-makers.

This policy document is needed:

— as a basis for drafting the text to be presented for official approval;

— to provide easy reference to the issues in the proposed terminology policy; and

— to provide insight into the implications of the implementation of the terminology policy, both in terms of actions to be undertaken and resources required.

The policy document shall clearly outline the strengths and the weaknesses of the current terminology situation in the organization or language community and the resulting implications for the overall situation.

Special attention shall also be given to the layout of the document as a reference document for administrators, legislators, decision-makers, controllers and managers who will have to approve it. Major references should be made with regard to the processes affected by the terminology policy, e.g. information, knowledge transfer, corporate communication, documentation, and knowledge management.

It is also important to select a favourable time to present the new policy to the decision makers. It should be kept in mind that the terminology policy has to compete with other budgetary posts. Also, in terms of coordination with other policies or possible changes in management, good timing can be crucial for success.

6.3.6 Decision on final terminology policy documents and implementation plan

Official approval of the final terminology policy shall be sought. It can occur in several ways:

— through other kinds of legal provisions referring to the final terminology policy document and implementation plan;

— by official adoption by an implementation body and a mandate to start with the implementation; or

— other kinds of official approval, especially when non-governmental institutions develop their terminology policies.

6.4   PHASE III – Implementation

6.4.1   General

The implementation phase comprises:

— the overall management of the implementation of the terminology policy;

— the operational and organizational planning of the implementation; and

— the planning of publicity and promotional activities.

6.4.2   Management of the implementation

Depending on the size of the organization or language community, the complexity of the situation and the scope of the terminology policy, its implementation can be managed by:

— one or several departments or (government) institutions;

— a committee or other group of people;

— an existing external institution or organization that is entrusted with this task; or

— a newly established institution or organization.

A body, institution or organization or other kind of structure shall be assigned to manage and carry out the implementation of the terminology policy. The choice for this implementation structure shall be based on the results of the investigations, assessments and consultations and should be best suited and equipped to fulfil this task. Considerations related to the actual political situation can have an impact on this decision. A fallback option should be envisaged in cases where the designated body, institution or organization does not or cannot perform its duties as required.

6.4.3   Operational and organizational planning of the implementation

Decisions shall be taken concerning:

— the establishment of a coordination mechanism;

— the formulation of an action plan and procedures for carrying out the implementation plan;

— the allotment of human and financial resources; and

— the implementation of a monitoring and evaluation mechanism.

Clear tasks and milestones shall be assigned and measurable results shall be identified.

Implementation of the terminology policy shall be accompanied by an evaluation and monitoring mechanism, allowing for timely corrections and adjustments to the implementation process.

6.4.4   Publicity and promotion strategy

Awareness-raising efforts should include top-down (advocacy) and bottom-up communication. These efforts should identify relevant change agents (these are people who act as catalysts for change or promote and enable implementation of the proposed change) and develop a plan for individual actions. Change agents can include administrators, decision-makers, legislators, domain experts, executive sponsors or prominent figures in society and the media. Active support of key individuals who understand and support the objectives of the policy is crucial in establishing a firm foundation for the successful implementation of a terminology policy. A supportive attitude within the language community or organization should be fostered in order to create a conducive environment for policy implementation.

References should be made to benchmarking examples from foreign models and experiences, bearing in mind local, cultural, organizational or historical sensitivities.

Throughout the implementation phase, publicity and promotional activities shall continue to ensure wide-ranging awareness of the terminology policy and minimize the risk of indifferent or even hostile attitudes among stakeholders.

A diligent use of the educational system will be suitable in order to avoid such a consequence. Education and training at all age levels is a crucial dissemination and implantation channel. The media should also be involved as much and as strategically as possible. In the case of language communities, cooperation with the media is essential, and the careful planning of outreach programmes and media events designed for the needs and expectations of the local audience will contribute to increased awareness and receptivity to the terminology policy. Promotional methods in corporate environments can include specific marketing strategies highlighting corporate language or multilingualism, the creation of added value and heightened demand. The terminology policy should be uploaded on national and corporate websites in order to raise awareness and stimulate participation from stakeholders.

6.5   PHASE IV – Policy maintenance

Ultimately, the terminology policy shall consider the future sustainability of the terminology infrastructure. Long-term financial support or sustenance shall be planned for. The terminology policy shall consider that:

1) terminology belongs to the intangible assets of a community or organization and, even if initial (financial) support is given, it is usually limited in time; and

2) measurable results of the benefits of the terminology policy show only after a certain period of time.

The terminology policy shall therefore:

— be accompanied by a business model for continued operation, independent from the regional, national or organizational budget, or at a minimum, by co-sponsoring;

— be frequently monitored, evaluated and reviewed, so that changes in the environment can be anticipated allowing enough time to react adequately;

— be supported by continued awareness-raising activities highlighting the importance of terminology policy, its direct impact on other processes, and the achievements of the current terminology policy (underpinned with statistics);

— stimulate research and the development of arguments that can serve as the basis for revision of the current policy;

— lead to the establishment of an active network with relevant institutions or organizations at local, national, regional and international level; and

— foster the creation of flexible infrastructures that ensure ongoing operation even in situations of financial slim-down.

Change management and other management skills should be among the major job skills required for the leadership personnel of any terminology infrastructure and should form part of regular capacity-building exercises.

Annex A
(informative)

Tools for stakeholder analysis

A.1 General

A stakeholder analysis helps identify people, groups and institutions that have a vested interest in the terminology policy because they could be affected by the content of the policy. Such an analysis helps to anticipate the kinds of possible involvement and their likely effects on the policy. Stakeholder analysis can be a basis for the development of strategies used to secure support for the policy by relevant stakeholders. Stakeholders can be directly or indirectly affected (primary stakeholders and secondary stakeholders, respectively). Key stakeholders are those of significant influence and can belong to either group.

A.2 Stakeholder analysis grid

The grid below (see Figure A.1) is designed to identify groups and individuals having varying levels of influence and interest in the terminology policy. Each stakeholder is placed in one of the four quadrants, depending on their anticipated interest in the policy and influence they have regarding decision-making or implementation. Depending on where stakeholders are placed on the grid, strategies are proposed on how best to accommodate them.

Should be offered information on a regular basis although not excessively.

Should be offered information occasionally and not intensively.

Should be offered information on an ongoing and extensive basis, in order to facilitate their full engagement.

Need to be adequately informed and offered opportunity for feedback to ensure that no major issues arise.

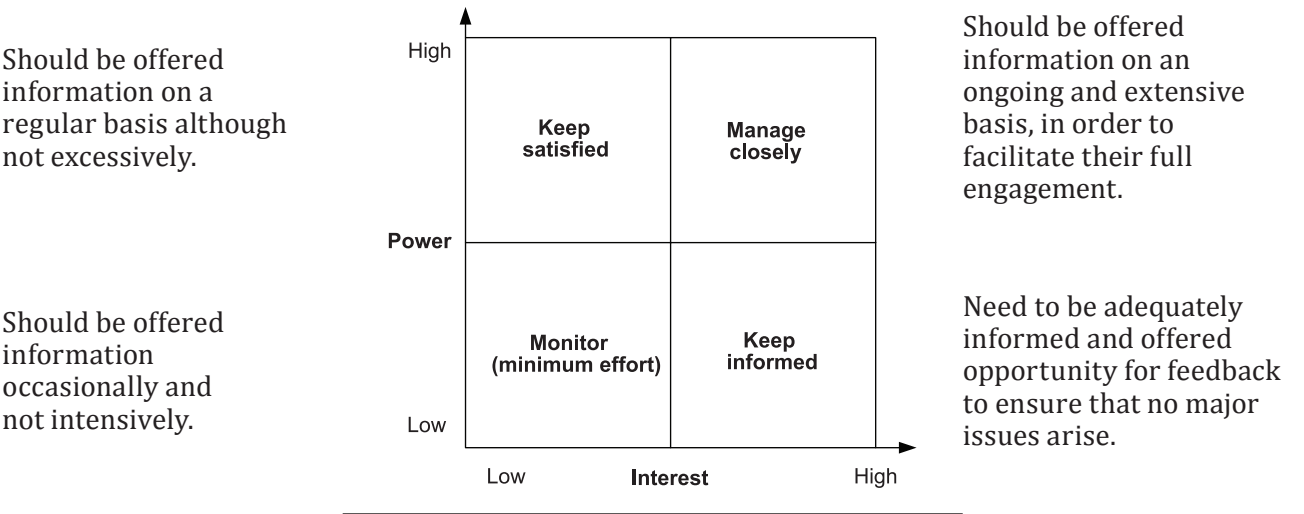| | High | | |
Keep satisfied		Manage closely	
Power			
Monitor (minimum effort)		Keep informed	
	Low		
	Low	Interest	High

Figure A.1 — Stakeholder analysis grid

Annex B
(informative)

Examples of terminology policy user categories and scenarios

B.1 General

Terminology policies can be developed at an international, national, regional and corporate level. Terminology policy scenarios are provided to give examples of different contexts and approaches used when developing terminology. The scenarios provided are not necessarily terminology policies, but examples of how different contexts inform on how terminology development should be done.

Terminology policies typically address different users or user groups who need different types of information. These include:

a)   businesses (mainly in the private sector or parastatals);

b)   terminology users: resource and documentation developers, translators, lawyers, marketing staff and others; and

c)   terminology managers: terminologists and information processors who are responsible for the development and maintenance of databases and other terminological resources.

Often, corporate terminology policies are part of other strategies (globalization, customer relations, marketing, quality and environmental, etc.). Terminology policies often take the form of guidelines or reference documents describing the processes of terminology work within the organizations and the tools used to support this work. These guidelines and reference documents often form part of other corporate policies, such as customer relations, marketing and international communication.

B.2   Categories of terminology policy users and policy scenarios

B.2.1   Categories of terminology policy users

B.2.1.1   General

Terminology policies can be used by different categories of people or institutions including businesses, terminology users and terminology managers.

B.2.1.2 to B.2.1.4 cover different types of users of terminology policy and their requirements and expected uses for such a policy.

B.2.1.2   Businesses

Terminology policy can be used by businesses in facilitating business processes, namely:

—   for consistency, quality and risk reduction;

—   for processes that are necessary to achieve the business operational and strategic goals;

—   for determining stakeholders involved and concerned with terminology; and

—   for identifying past strategies and history of terminology work in the company.

B.2.1.3 Terminology users

The three main expectations by terminology users when implementing terminology policy are, namely:

— finding information about designations and concepts;

— searching for terminological data such as terms, definitions and concepts; and

— using terminology correctly.

Terminology users can be concerned with the implementation of terminology resources in the following areas:

a) in resource development (consulting relevant standards, creating a glossary for a product, choosing terms for new resources, dealing with homonymy and synonymy, etc.);

b) in terminology list development (selecting terms, creating definitions, cross-references, using terms from other companies/departments, copyright);

c) in the translation of a product (using terms and terminology databases, getting feedback and posting questions about the product, etc.);

d) in contracts and legal documents (copyright, using definitions for legal documents, cooperation with external partners, product safety and liability, etc.); and

e) in marketing and customer relations (branding and customer language, consulting definitions and terms in consumer hotlines and advertisement, trademarks and registered terms/names, etc.).

B.2.1.4 Terminology managers

The main expectations by terminology managers when implementing a terminology policy are:

— information about the terminology database, its developer, and its content;

— information about how to use the database, including how to make terminological entries, and which designations and concepts should and should not be included;

— information about workflow for database maintenance, including importing and exporting terminology, managing terminology in the database (dealing with obsolete terms, duplicates, etc.);

— information about other databases and repositories; and

— how to assist translators in preparing terminology for a translation project.

B.2.2 Different terminology policy scenarios

B.2.2.1 General

Different scenarios and environments that can require different kinds of terminology policies are described in order to inform the terminology development and implementation process. A few scenarios are provided, namely, trade industry specific, and national ones.

B.2.2.2 Industry specific

Scenarios on terminology policies can also be specific to industries, examples of such are as follows.

a) **Trade**

The scenarios from the trade industry (Incoterms), though unilingual in nature, follows the language policy that considers English as the language of trade in order to facilitate the communication process amongst trade partners. As a result, the terminology development and standardization process is

informed by the unilingual approach. The case of Japan is one example where the language of business changed from Japanese to English only.

b) **E-health**

With the e-health scenario, different linguistic contexts (multilingual) in which e-health or health terminology are applied or used, is taken into account when developing terminology.

WHO's intentions are to ensure that e-health multilingual terminology is made available to its users. As a result, systematized nomenclatures are made available in English and other languages such as French, German and Spanish. A number of translation tools are used in realising the multilingual objective. However, some of these efforts are still at the feasibility stage.

Progress made in the e-health applications resulted in the increased use of electronic health records that require standardized clinical terminology. The exchange of information in e-health applications also requires both standards for information technology (e.g. technical specifications for communications between different computer systems) and content (e.g. a terminology that ensures that information exchanged between different users will be understood and reliably used). Electronic documentation of patient records and representation of health information in computer applications are used for a standard data structure of clinical terminology. In this case, WHO is most useful in the promotion of standardized health care terminology.

Terminology development in this regard is based on the following principles:

— Increased need of content interoperability for the exchange of health records and other health information across national and system boundaries.

— Multilingualism: aimed at providing international and multilingual framework, relevant concept-based translation and linguistic representation mechanisms.

— Shared technological standards: appropriate technological tools to be used in developing, maintaining and updating norms and standards in a systematic and harmonized fashion.

— Web-based systems for generation and distribution of data: such systems would facilitate open development and review sharing of information. In this case, ISO is well-established.

B.2.2.3   National

National terminology policies are many and varied. Three examples are given below.

a) **Canada**

In Canada, bilingual, multilingual and indigenous language policies have shaped the linguistic landscape. For example, the terminology development process is guided by the country's choices of official languages, English and French. While English and French are official languages in Canada, many indigenous languages are spoken in the country. For example, the Inuit language (Inuktituk and Inuinnaqtun) is an official language in the territory of Nunavut alongside English and French.

To deal with the economic and cultural hegemony of the English language, Canadian policy-makers have opted mainly for legislative and legal measures to protect and promote minority languages, especially the French language.

b) **Wales**

In Wales, English and Welsh are co-official languages and terminology policy is seen as part of language planning. This relates especially to the Welsh government's language strategy: Cymraeg 2050: A Million Welsh speakers, with its target to nearly double the number of Welsh speakers by 2050. In this strategy, terminology planning falls under the theme of linguistic infrastructure, emphasising the importance of high-quality sources of terminology that facilitate the use of Welsh in all aspects of everyday life. This includes technical or specialized areas such as technology, law, and education. This is further elaborated in the Cymraeg 2050: Work programme 2017-2021, that intends to support the production

of more high-quality lexicographical, corpus and terminology resources to support learners and fluent speakers.

Guidelines for the Standardization of Terminology for the Welsh Assembly Government Translation Service and the Welsh Language Board were published in 2007, based on relevant ISO standards, and have since formed the basis of terminology standardization activities in Wales.

c) **South Africa**

The South African scenario is guided by the Constitutional pronunciation of the 11 official languages as a way of acknowledging the multilingual nature of the country. This is further supported by the Use of Official Languages Act of 2012 (Act No. 12 of 2012), that obliges all national government departments, public entities and public enterprises to develop language policies and to establish Language Units. The Act further mandates all these institutions to take practical and positive measures to elevate the status and advance the use of official languages in accordance with the Constitution. Therefore, terminology development matters in South Africa are guided by the Constitutional pronunciations and the language stipulation given in the Use of Official Languages Act.

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