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Practical guidelines for socioterminology

Lignes directrices pratiques pour la socioterminologie

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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.

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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.

In exceptional circumstances, when a technical committee has collected data of a different kind from that which is normally published as an International Standard ("state of the art", for example), it may decide by a simple majority vote of its participating members to publish a Technical Report. A Technical Report is entirely informative in nature and does not have to be reviewed until the data it provides are considered to be no longer valid or useful.

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ISO/TR 22134 was prepared by Technical Committee ISO/TC 37, *Terminology and other language and content resources*, Subcommittee SC 1, *Principles and methods*.

Introduction

Terminology standardization has always been the prerogative of experts in terminology, the latter dealing exclusively with technolects. In this context, the principles, method and vocabularies drawn up by terminologists are not always suitable for the speakers' communities which are heterogeneous. This situation does not lend itself to permitting mutual understanding between these linguistic communities.

Socioterminology which is linked to localization facilitates communication between different socioprofessional groups. It studies terminologies, placing them within the social context where the concepts appear, are defined and are named. It unites the specialized concepts with a community of speakers. In this way, socioterminology enables terminological practices to be adapted to the target languages and linguistic communities addressed by the linguistic work.

The drafting of practical guidelines for socioterminology is an attempt to match what is said and what is done in the daily life of speakers. Although the methodological principles drawn up by planning terminologists seem to have a relatively universal spread, the ensuing practices on the other hand shall be adapted to the targeted linguistic communities. It is in this context that this Technical Report will be used for the interpretation and usage of the other TC 37 documents within the perspective of cultural and linguistic diversity and, therefore, within the meaning of terminology planning practice on the world scale.

This Technical Report will also be used as a basis for future work within TC 37/SC 1. In 2007, this subcommittee intends to undertake the preparation of a series of practical guidelines derived from ISO 704 and ISO 860 in order to facilitate the implementation of these International Standards in the terminology practice.

Practical guidelines for socioterminology

1   Scope

This Technical Report proposes guidelines for socioterminology principles, methods and vocabularies.

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 1087-1:2000, *Terminology work — 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
language planning
any intervention of a national, international or social body aiming at the definition of the functions or the status of one or more concurrent languages in a territory, or aiming at the standardization or instrumentalization of one or more languages so that these languages can fulfil their assigned functions in the frame of a predetermined linguistic policy

NOTE   Language planning can include status planning as well as corpus planning.

3.2
terminology planning
activity aimed at developing, improving, disseminating and implementing the terminology of a subject field

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

[ISO 1087-1:2000, 3.6.4]

3.3
subject field
domain
field of special knowledge

NOTE   The borderlines of a subject field are defined from a purpose-related point of view.

[ISO 1087-1:2000, 3.1.2]

3.4
concept harmonization
activity for reducing or eliminating minor differences between two or more concepts which are already closely related to each other

NOTE   Concept harmonization is an integral part of standardization.

[ISO 1087-1:2000, 3.6.5]

3.5
term harmonization
activity leading to the designation of one concept in different languages by terms which reflect the same or similar characteristics or have the same or slightly different forms

[ISO 1087-1:2000, 3.6.6]

3.6
special language
language for special purposes
LSP
technolect
language used in a subject field and characterized by the use of specific linguistic means of expression

NOTE   The specific linguistic means of expression always include subject-specific terminology and phraseology and may also cover stylistic or syntactic features.

[ISO 1087-1:2000, 3.1.3]

3.7
localization
adaptation of a product or communication to a community of speakers with respect to cultural, linguistic, legal, political and technological factors

3.8
neologism
new term coined for a given concept

NOTE   Although neoterms sometimes rename established concepts, they usually name new concepts.

[ISO 1087-1:2000, 3.4.7]

3.9
terminology standardization
establishment of terminology standards or of terminology sections in technical standards, and their approval by an authoritative body

[ISO 1087-1:1990, 8.3]

3.10
linguistic policy
any kind of decision made by a state, a government or a recognized or authorized organization, aiming at the orientation of the utilization of one or more languages in a virtual or real territory

NOTE   A linguistic policy stands at the level of the determination of objectives. The fields of intervention of linguistic policies are various and may cover any category of activities of a society.

3.11
socioterminology
approach of terminology work based on the sociological, cultural and sociolinguistic characteristics of a linguistic community, aiming at the study and the development of its technolects in accordance with those characteristics

3.12
terminology work
work concerned with the systematic collection, description, processing and presentation of concepts and their designations

[ISO 1087-1:2000, 3.6.1]

4   Object of the document

The ultimate object of this Technical Report is to provide methodological guidelines for the interpretation and use of other TC 37 documents within the perspective of cultural and linguistic diversity. It aims to establish a system of concepts applicable to terminology work in the sociolinguistical context and to reinforce the social character of terminology. In the short term, it provides the necessary foundations to implement these methodological orientations. This Technical Report aims to meet the requirements of the linguistic market which oscillates between the localization pole and the intercomprehension pole and to lead to a new concept of standardization and terminology harmonization that takes account of social linguistics. Three sections make up the framework of this Technical Report; they are

⎯ basic concepts,

⎯ general principles,

⎯ methodological principles of socioterminology.

5   Basic concepts of socioterminology

5.1   Socioterminology

5.1.1   General

In socioterminology, everything that is spoken, even in scientific and technical fields, constitutes an act of language. Every act of language is based on a mode of perception, on a mode of appropriation and on a mode of expression of the actual situation, all of which include cultural and sociolinguistic characteristics.

Socioterminology (3.11) was born from a quite precise need to unite specialized concepts to a community of speakers. It is concerned with the dissemination of terms and their development and perceives the scientific and technical term from a purely communicational viewpoint, in contrast to the normative attitude, which favours a conceptual viewpoint.

Socioterminology does not renounce to important acquired knowledge of theorization and practical know-how, but seeks to link all that to use analysis in technolectal discourse of the target group. Thus, the socioterminological approach provides the drive to revise or to readjust the concept of the field, and the role and actions of the expert (Gambier,1994/1995: 106 [6]).

Socioterminology takes a diachronic approach, whereas standardization follows a more synchronic approach. Indeed, socioterminology incorporates the dimension of diachromy, i.e. the evolution of linguistic facts in the study of vocabularies, by considering that the terms concentrate accumulated knowledge and reflect the dominant concepts of the experts, whereas terminology standardization can only be conceived of synchronously, i.e. according to a set of linguistic facts regarded as forming a functional system, at a specific moment in the evolution of a language.

In this regard, socioterminology makes it possible to humanize terminology standardization as conceived at the time, i.e. with rules and strict criteria to be followed. As a discipline, socioterminology is more open in that it takes account of human elements. It mirrors man in his sociolinguistic, cultural and socio-economic concerns and illustrates his everyday life.

Thus, socioterminology, as a practice, starts with the analysis of specialized discourse, whether written or spoken. It makes it necessary to construct textual corpuses corresponding to the various scientific, technical and professional communication situations. These corpuses are then analysed in order to extract from them the terminologies in use, as well as all the terminological data and terminological material used for terminology work.

A corpus is built up continuously nowadays, in order to have permanent access to an updated collection of data. A well-constructed corpus shall comprise the following characteristics: actuality of the texts, representativeness of the communities of the speakers of the technolect under study and relative exhaustivity[1].

This approach can be combined with the other methodological approaches in terminology: textual approach and the traditional conceptual approach, which are well documented particularly in ISO 704.

5.1.2 Methodological approaches of terminology

5.1.2.1 The cognitive or conceptual approach

This approach to terminology is the one that underlies ISO 704 that recommends the preparation of terminology on the basis of the analysis of concepts and their structuring in coherent sets that give an account of the knowledge in a field of experimentation. This approach specifically uses analysis grids of categories and sub-categories of concepts made up of elements such as entities (principles, material objects, non-material objects), properties (quantities, relations, qualities), activities (operations, procedures), dimensions (times, space, position). These grids can be developed as and when required according to the nature of the conceptual field analysed.

5.1.2.2 The textual approach to terminology

Another approach to terminology consists of starting from scientific and technical discourse where this is the privileged position for drafting and naming concepts[2]. This concept is called "corpus terminology", as it consists of examining the corpus of texts produced freely by experts in a field in order to extract from it significant factors that enable the concepts to be reconstructed and to extract the data essential for drafting definitions, and terms or "candidate terms" that designate the concepts. The practice of corpus terminology includes strict methodological requirements regarding the choice and critique of the texts to be used and the method of analysis of the texts[3].

5.1.2.3 The socioterminological approach

There is finally the so-called socioterminological approach based on the analysis of "discursive practices" that accompany socioprofessional practices in their sociocultural establishment and in their sociolinguistic environment (communication, level of technicality, etc.). This approach involves the conditions of discourse production and examines the cultural methods of drafting concepts, and the process for creating or adapting terminology in the language tradition of the languages and linguistic communities targeted in this sociocultural environment. This approach that is the subject of this Technical Report naturally includes the study of terminology variation.

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1) See Jennifer Pearson's book, *Terms in Context* (Reference [13]).

2) See on this subject: Loubier, C. and Rousseau, L.-J. (Reference [11]).

3) This approach to terminology and its requirements have been described in detail by Jennifer Pearson (see Reference [13]).

It is obvious that the three approaches to terminology mentioned above are not mutually incompatible. On the contrary, it is often the case that, in the current practice of terminology work, they are used simultaneously with success in an attempt at obtaining good quality.

The socioterminological approach also assumes a concerted terminological development that is based most of the time on terminology research for which the methods differ according to the organizations involved. In all cases, it is a question of orientation of usage, whether it is freely agreed or not by the users. However, even if the user lends credibility or, at the very least, a certain legitimacy to the terminology planners, if only because of the generally official character of the action they take, he often remains sceptical and exercises his linguistic feeling by comparing the proposed usage to his personal usage or the usage he observes in his immediate professional environment.

Experience shows that the critical awareness of the speaker is more acute when a term is proposed to him in his own language than when he adopts a foreign term without examining it. This will be even more the case if it is proposed to him to replace a term in his language with another term thought to be more suitable in the same language. This critical awareness is a quite legitimate manifestation of the linguistic competence of the speaker who provides terminology judgement based on criteria personal to him.

The use of a term by the speaker is not therefore automatic because of the single fact that it is recommended by an official body; all terminologists know that well. The reasons that explain the effective usage of a term remain unforeseeable most of the time, but successful introduction requires nevertheless that the terminologist ensures that certain methodological conditions are met.

5.2 Terminology planning

Terminology planning (3.2) is a specific case of code planning. It is generally based on a linguistic policy, formulated or not, and includes all the aspects of terminology work, from research to implanting terms in the targeted professional environment. Terminology planning, if performed according to the book, is an application of socioterminology. Other concepts shall be mentioned to describe the socioterminological approach of terminology.

5.3 Technolect

Technolects (3.6) are made up essentially of terminologies and other linguistic means of expression (for example terminological phrases) or non-linguistic means, such as pictograms or symbols. In each language, there are technolects that correspond to the various specialities. Technolects may include differences in language level, differences of professional point of view or regional variations for the same given language. These technolects are constructed and developed according to terminology and linguistic traditions on which the terminology planning work shall be based.

5.4 Neology

Neology consists of the creation of a new term (unedited form), or of a new meaning for a form already in the language, or of borrowing a term from another field of knowledge. An example of the latter is the borrowing by the field of IT security of a collection of virology terms. There are numerous methods for forming new terms in each language. This creation obeys the rules, specific to each language, which should be followed.

6 General principles in socioterminology

6.1 General

This clause on the general principles of terminology deals essentially with the objectives of terminology work, standardization, socioterminology and its contribution to terminology standardization, as well as with the links between socioterminology and localization.

6.2 Objectives of terminology work

6.2.1 General

The objectives of terminology work are well-known in the language specialist environment. Terminology work is based on the capacity to register terms designating the concepts of a specific subject field, to authenticate their use on the basis of accurate references, to describe them briefly differentiating between correct and incorrect usage, and to recommend or advise against certain usages in order to facilitate unambiguous communication.

6.2.2 Standardization in general

Standardization is applicable, firstly and above all, to products, to production methods (in the wide sense), to services, to procedures (manufacturing, processing, etc.), mainly in the fields of industry, commerce and public services. Its aim is essentially to eliminate individual characteristics of objects (concrete or abstract), if they are not needed to fulfil the function specified for them; these objects can then be modelled on a type which ensures their interchangeability, regardless of the place and date of production. To attain this objective, standardization is based on a certain number of general principles given below.

a) Standardization is essentially an act of simplification resulting from the conscious effort of society. This effort requires a reduction in the number of certain objects. This results in a reduction in the current complexity and aims to do away with all superfluous complexity in the future.

b) Standardization is as much a social activity as an economic activity and its promotion shall be the fruit of collaboration between all interested parties. The establishment of a standard shall be based on general consensus.

c) While complexity is reduced, standardization does not mean that it works against diversity in society. On the contrary, the standardization fosters interoperability despite diversity.

d) The publication of a standard has little value in itself; it is its implementation that is important. This implementation will oblige certain parties to make sacrifices, but it will be for the greater good of all.

e) Standards shall be reviewed at regular intervals and revised if necessary. The intervals between these reviews generally depend on the circumstances of the moment.

f) When conditions of use or other characteristics of a product are specified, test methods shall be specified to determine whether the article conforms or not to the specification.

g) The need to make a standard legally mandatory at a national level shall be examined intentionally, taking account of the nature of the standard, the level of industrialization and the laws and predominant conditions in the society for which the standard has been prepared.

6.2.3 Terminology standardization

Terminology standardization (3.9) is aimed particularly at ensuring better comprehension between members of the same linguistic community, either within a certain domain (having the same levels of technicality) or across domain borders. It responds to the needs of special and diversified communications by creating terminological consensus, particularly in cases where the multiplicity of usages leads to a certain confusion. It develops and modernizes terminology on the basis of technological, administrative or cultural changes and makes it possible to reduce the linguistic insecurity caused by a linguistic change (Rousseau, 1991:79 [19]).

Terminology standardization (3.9) necessarily makes reference to specialized vocabularies (as opposed to the common vocabulary). It shall reflect a terminology system that corresponds to the system of the subject field in question. The terminology defined in an International Standard shall be precise and lead to increased clarity in communication (see ISO 704).

Terminology standardization is a necessary supplement to the standardization of objects (concrete and abstract) and methods as it supplies unequivocal names essential for the representation of standardized concepts. It encompasses, in some way, concepts in labels or names which will allow a variety of interlocutors to perceive an identical message; it therefore plays the role of guardian of the integrity of concepts that have been the subject of standardization. Terminology standardization also has a role to play in the elimination of ambiguities by attacking the problem of useless synonymy.

However, in the case of languages where usage is spread over different territories, it is inevitable that different terminologies evolve. These variants are generally perfectly legitimate and it is not possible nor desirable to think of eliminating them. Rather, it is essential to describe them and to ensure their equivalence. In this regard, standardization consists of recognizing officially this relationship of equivalence between these variants.

6.3 General terminology standardization principles

Terminology standardization can be perceived as a means for ensuring the efficiency of the communication where certain action principles are observed. The main principles are listed below.

a) Terminology standardization shall be based on a correct description of terminological uses and on the analysis of communication situations.

b) Terminology standardization shall be freely agreed by the targeted speakers even when the use of the standardized terms has something of a mandatory character.

c) Terminology standardization shall be carried out in close association with the targeted professional people and be accompanied by prior consultation with the users.

d) Terminology standardization shall seek to precede use rather than attempt to correct a usage already established.

e) Standardized terms shall be selected taking account not just of the usual terminological criteria, but also of implantability criteria. Standardization requires a socioterminological approach.

The social aspect is omnipresent both in general principles of standardization and in those of terminology standardization. This illustrates clearly the close relation between standardization and socioterminology, as well as the indestructible links between them. Thus, standardization and socioterminology are not in competition, but are complementary and reinforce each other.

6.4 Objective and role of terminology standardization

The objective of terminology standardization is to direct usage in the various specialized sectors by making a clear selection, according to a methodology and precise criteria, of terms deemed suitable to designate a particular concept (Gaudin and Assal, 1991: 141-142 [7]).

One primary function of a standardized terminology is to indicate preferred, admitted and deprecated terms. A term recommended by a technical committee shall be considered a preferred term whereas an admitted term shall represent an acceptable synonym to a preferred term. Deprecated terms are terms that have been rejected (see ISO 704).

6.5 Basic requirements of terminology standardization

6.5.1 General

A set of guiding principles can be derived from all the terminology standardization work initiated over the last few years that, without having been the subject of formal agreement between the various national and international standards bodies, is generally recognized and applied albeit in varying degrees. *Some of the principles are given hereafter.*

6.5.2 Linguistic intercomprehension

Terminology standardization only applies to the language subset formed by technolects and, within this sub-set, to the categories of –nymies (simple or complex); terminology standardization does not concern either morphology or syntax. When necessary, it applies to phonology and the written form. [...]. However, it should be noted that terminology standardization may be called upon to play an important sociolinguistic role by becoming an instrument intended to fight against the invasion of foreign terms.

6.5.3 A means rather than an end

Terminology standardization is not an end in itself. On the one hand, it is a consequence of standardization in general and, on the other, its main aim is to facilitate communication by reducing loss of information and by minimizing the risk of ambiguity. It therefore occupies a well-defined place in all the terminology activities.

6.5.4 Sociolinguistic values

Terminology standardization shall take account of sociolinguistic factors such as established usage, the implantation medium, the overall political situation, the needs of the users, etc.

6.5.5 Psycholinguistic values

Terminology standardization concerns the modes of expression of individuals and of communities; it shall therefore take into consideration psycholinguistic factors such as aesthetics, motivation, the habits of the talking subject, individual inhibitions, natural resistance to change, etc.

6.5.6 Need for dissemination

Terminology standardization shall be the subject of a dissemination plan/programme that shall be as extensive as possible, otherwise it would run the risk of not being enforced properly. Standardized terminologies are circulated by ordinary means of communication (bulletins, publication of lexicons, Internet, distribution lists, etc.), but this dissemination shall also be able to count on the powerful levers that are the specialists in the various subject fields, as it is these people who, in the end, establish the usage.

6.6 Contribution of socioterminology to standardization

6.6.1 General

Terminology standardization benefits from the contribution of socioterminology in that it extracts the terms to be standardized from the various sociolinguistic communities of the speakers to have them validated by the major standardization committees nationally and internationally. In short, standardization is profoundly influenced by sociological factors.

In standardization, socioterminology often plays a role downstream of the practices it is seeking to change. At this level, the requirements of a socioterminology have been well illustrated, for example, by

⎯ some enquiries on the acceptance/rejection of terms ⎯ without, however, the factors favouring consensus or resistance being clearly established,

⎯ efforts to analyse the role of agents intervening for example in the ministerial committees and with studies of the terms as a reflection of the field and community of peers (Gambier, 1994/1995: 107 [6]).

Gambier assigns three groups of tasks to socioterminology:

⎯ observation and description of the actual usages;

⎯ identification of the networks for disseminating the terms;

⎯ definition of the terminology stakes as a discipline.

6.6.2   Observation and description of actual usages

The observation and description of the actual usages are considered in their variations, if not in their contradictions, between usage-based standardization (standards resulting from practices, several standards being able to co-exist) and standardization (specification), between the temptation of the single and the reality of the multiple, between the trend towards universalization and the needs of specialization, between the constraints of homogenization and the forces de differentiation. This initial task also involves understanding the role and impact of the vocabularies within the constituent groups, the vocabularies operating as one of the constituent elements of these groups.

6.6.3   Identification of the networks for disseminating the terms

In identifying networks for disseminating terms, there are two types of work to be carried out: on the one hand, to describe the factors, the situations that favour or not circulation and implantation (how terminologies are infused or diffused into the professional environment), on the other hand, to list the methods, supports for terminology creation, for transmission (oral discourse, texts, databases, etc.), by using the possible logic of mediatization.

6.6.4   Definition of the terminology stakes as a discipline

The definition of the terminology stakes as a discipline is proving essential to understand better what decisions have been taken, its contributions to linguistic policies, terminology equipment, standardization, etc. This set of tasks may be distributed along two axes.

On the horizontal axis, that of diachrony, it would be a matter of doing the archaeology of the terms and concepts. Their sociogenesis would clarify both the development of knowledge systems and the role of intertextuality in the constitution of a discipline, blurring frontiers that are too restrictive, shifting the relationships between sciences, technologies and production, between knowledge and know-how. On the vertical axis, that of synchrony, would appear the flows of terminological and conceptual traffic between the various actors (scientific communities and other different social groups), between the various treatises (scholarly, popularizing, educational, etc.).

6.7   Harmonization of terms

Satisfying socioterminology requirements in normative terminology work does not exclude having the harmonization of terms in sight.

Harmonization of terms can lead, for intercomprehension reasons, either to the adoption of a preferred term, or to official recognition of equivalence relationships between variants in the same language and, of course, between terms in different languages.

ISO 860 proposes a method for the process of concept and term harmonization. According to ISO 860:—[4],

"Concepts and terms develop differently in individual languages and language communities, depending on professional, technical, scientific, social, economic, linguistic or cultural factors.

In spite of all the efforts made to coordinate terminologies as they develop, it is inevitable that overlapping and inconsistent terminologies will continue to be used because documents and policies are produced in different contexts. Differences between concepts and misleading similarities at the designation level create barriers to communication. Harmonization is, therefore, desirable because:

— differences between concepts do not necessarily become apparent at the designation level, e.g. 'public school' in the UK is a private independent fee-paying secondary school whereas in the US a 'public school' is any school that is part of the free local educational system;

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4)   To be published. (Revision of ISO 860:1996)

— similarity at the designation level does not necessarily mean that the concepts behind the designations are identical, e.g. in the field of fruits, *en* **raisin** (dried grape) and *fr* **raisin** (grape);

— mistakes occur when a single concept is designated by two synonyms which by error are considered to designate two different concepts.

Harmonization starts at the concept level and continues at the term level. It is an integral part of standardization."

6.8 Linguistic and terminological standards

6.8.1 Linguistic standards

Linguistic standards can be defined as "any category of social standards that by value judgements, by an appeal and (expressed) normative attempt, determine the proportion of permitted linguistic methods and – as a function of the factors linked to the situation of the linguistic act – recommend and/or prescribe also a specific choice of these methods" (Gessinger and Clück, 1983: 228).

Linguistic standards are social and not natural: they are not inherent to the language itself, but emanate rather from the action of the society – or a part of it – on the language. In other words, the language is a system in which the possibilities in the linguistic practices of the speakers are unlimited and the linguistic standards of the speakers are to some extent principles – determined socially – that fix the ways in which to update this system.

Once formulated and explicitly codified in the various types of treatises on the language (grammars, dictionaries, etc.), once dedicated to a reference tool, linguistic standards become socially dominant in that they are imposed as the ideal to follow by every speaker and, all at once, cloud the systematic heterogeneity of the linguistic behaviour of the speakers within society. Linguistic standards therefore represent a selection of actual or possible forms, resulting in their arbitrary nature (Gaudin and Assal, 1991: 139-140 [7]).

In this regard, linguistic standards are the product of the activity of the society – or part of it – on the language and whose practical finality is to make uniform the use that individuals make of this language in the different linguistic acts. It can be deduced that the raisons d'être of this normative activity are extra-linguistic in that it is determined by historic, sociological and ideological factors (Gaudin and Assal, 1991: 139-140 [7]).

6.8.2 Linguistic standard *versus* terminology standard

From the analysis by Gaudin and Assal (1991: 141-142 [7]), it can be said that linguistic standardization and terminology standardization do not obey the same logic. Indeed, linguistic standardization is aimed at the language in its totality, as a system and as a treatise. Terminology standardization, on the other hand, is a sectorial activity, in that it takes in hand a single aspect of the language, that of specialized vocabularies. Its aim is to rationalize the use of these vocabularies in the various fields of activity. In this regard, it is similar to technical standardization where work is centred around the rationalization of the production of goods.

According to Gaudin and Assal (1991: 139-140 [7]), wishing to direct usage, terminology standardization becomes a coercive approach in the same way as linguistic standardization: the two approaches, by importing standards, actually attempt to make variability of usage disappear. It is at this level that they merge in spite of the differences from the point of view of motivation, procedures and objectives.

However, it should be noted that official standardization is only one of the numerous guiding forces for usage. Thus, for example, the terms used in the texts of law and regulations or those used by the large industrial groups also have an influence on the choice of speakers.

Gaudin and Assal (1991: 141-142) note that the choice of a standard is never intuitive. According to them, this choice is made according to a precise and well-structured methodology that can be criticized on certain points (as, for example, the choice of the documentation on the term to be standardized, the place of usage and the role of the expert), but which remains globally objective compared with linguistic standardization where the choice of a standard and its dedication — as an ideal model to be followed by every speaker — is profoundly influenced by sociological factors.

6.9 Terminology standardization as an integral part of linguistic policies

6.9.1 General

The concept of "linguistic policy" (3.10) is very wide and encompassing. It refers to all forms of decision taken by a social actor to guide and regulate the usage of one or more languages.

The linguistic policy fields of activity are numerous and can cover all the categories of activity of a society (Rousseau, 2000-2004).

A linguistic policy can comprise elements relating to the status of the languages aimed at, i.e. their recognition as official languages, national languages, etc., and their respective usage in different fields such as public administration, commerce and business, work, teaching, or in a wider sense, the basic linguistic rights of the citizens or communities (collective rights of a minority of speakers, for example). A linguistic policy can also comprise elements regarding the code of the language, i.e. its internal development (the standard, for example).

In numerous cases, there can be some interdependence between the status of a language and the degree of internal development of this same language, that is to say, for example, that to attain a specific status, a language shall have the necessary instruments to be able to play the role one wishes to assign to it. This is the reason why there are numerous cases of linguistic policies including the two aspects: status development and code development.

Implementation of a linguistic policy is by means of the adoption and putting into practice of a linguistic development plan. This is found in the strategies and methods to be implemented to attain the objectives of a linguistic policy, formulated or not. Linguistic development is not just a matter for nation-states, but can be initiated by linguistic communities themselves through institutions of all kinds (public or private).

A linguistic development plan generally includes the following phases:

— analysis of the linguistic situation;

— determination of objectives to be attained (linguistic situation aimed for);

— planning;

— implementation;

— final assessment.

6.9.2 Code development

The code development of a language can cover different aspects. Initially, it can involve drawing up a simple description of this language (lexicon, syntax, phonology, etc.) and standardizing it. It can also involve giving a purely spoken language a writing system or to ensure its standardization. It can also involve enriching the lexicon of a language in order to make it more suitable for more elaborate communication. Finally, major reforms of the code of a language can be undertaken, particularly, taking recent examples, reforms of the spelling.

The dissemination of standardized terminologies (by ISO or any other standards body), whether it is a question of terminology standards, terminology sections of technical standards or of the simple usage of specific terms in a technical standard, influences the language practice of thousands upon thousands of people who use these standards. Terminology choices that are the principal factors in drafting these standards come within the scope of the linguistic policy of the bodies who publish these standards. In the case of ISO, this linguistic policy occupies two levels:

a) the stipulations of the ISO/IEC Directives with regard to the official languages and the working languages of ISO;

b) the standards of ISO/TC 37 on terminology principles and methods, particularly with regard to the harmonization of concepts and terms.

6.10 Socioterminology and localization

6.10.1 General

Localization is a process of adaptation, both linguistic, drawing on translation, terminology and editing, and non-linguistic, drawing on programming and ergonomics, of a product with an IT component (e.g. software, mobile phone, CD-ROM, palmtop computer or website), often with the aim of selling the product to a specific cultural and linguistic community.

The sociolinguistic factors such as implantation medium, cultural preferences, political trends, linguistic policy, status of a language, established usage or even the needs of the users, therefore, play a primary role in the success or failure of the objective. Depending on the targeted public (e.g. men or women; adolescents, adults or OAPs; Africans, North Americans, Latin Americans, Asians or East Europeans), an IT product will be localized differently.

6.10.2 Terminology — The key to localization

Terminology is the "king pin" of localization as the vocabulary relating to the product has to be established while respecting the "linguistic usages of the local specialists" (horizontal axis) and ensuring "rigorous terminological consistency between all the versions [of the] product and with related articles" (vertical axis) (Quirion, 2003: 546-558 [16]).

In order to facilitate the terminology work, ideally, "products should be internationalized right from the design stage" (Gouadec 2003: 528). It is a question of a process closely linked to terminology consisting of "erasing everything in the products and/or their supplements that falls within the scope of cultural, linguistic, technical, religious, philosophical, value system, argumentation and presentation method or other specificities". As a result, everything to do with the product to be localized is made neutral.

Thus, just like in painting by numbers, localizing comes back to giving a local image by inserting local colours in the places indicated. These colours represent the connotations and denotations linked to the language and the culture, which includes the business culture, driven by words and terms.

The localization industry, it could be said, has a liking for terminological variation, the multiplicity of usages, while and for as long as they permit efficient and profitable communication with the consumers of the target market.

6.10.3 Terminology — Rapid evolution

Localization falls between several stools. IT changes rapidly, societies are transformed quickly and, in the case of web sites, cyberculture evolves in parallel with the other "traditional" cultures. In addition, on the web, a site has to be modified frequently, otherwise the web surfers become bored and will not visit it again. All these changes can lead to new terms that the localizers have to know and record both at the local and international level, and this is why socioterminology is important.

6.11 Linguistic localization as an application of sociolinguistics[5)]

6.11.1 Locale and sociolinguistics

The idea that supports localization is what is called "locale" in English. In French, this term can be rendered as locus[6)]. According to Texin[7)] and Guidère[8)], a locale is a group of cultural preferences. The locale permits identification of the language, the currency, the means of indicating the time, the date, weights, measures, numbers and addresses linked with the users involved with the localization process.

The locales take on the name of the language they use for identification, followed where necessary by the name of the country and arbitrary codes for recognizing the "variations". The first two types of codes (language, country) are taken from ISO 639 (Texin, 2003: 25 [20]).

The descriptive traits coming within the scope of sociolinguistics and qualifying the locales are as follows (inspired by Texin, 2003: 26 [20]):

— worldwide — representing the cultural preferences of the users in the whole world;

— distinctive — permitting differentiation of the various groups of users;

— correlative — connecting a culture to a locale;

— determinative — correctly describing the types of preference linked to each locale;

— specific — defining accurately the specific preferences of all locales.

The following qualifiers shall be added to this list:

— stable — ensuring stability of the definitions and locale tags: no locale should be given a new meaning nor be deleted or reused;

— adaptable — having procedures permitting the creation of new language and culture names to take account of evolution.

Of course each locale has its own particularities that shall be taken into account. The particularites are as many cultural characteristics, important socially, influencing the choice of localization terms and words. Therefore, they represent an interest for the sociolinguist and shall be known by the localizer. Amongst other things[9)], we can name the meaning of colours, the symbolism of geometric and architectural shapes, cultural stereotypes and social clichés — for example, the manner in which the self and another is presented —, literature, music, history and religious beliefs. To this list can be added customs, social and commercial habits, professional practices, rules of behaviour, ethical standards, political organization, legislation, the form of nationalism and the history and geography linked to the locales.

Also, the public targeted within a society may be precise and vary according to age (to promote games), sex (to sell clothes or cosmetics) and social class (to extol the merits of a car). All these characteristics have a terminological impact as certain terms have connotations of religious taboos or behaviour going against the rules of behaviour. Therefore, their use shall be excluded in certain locales and the reasons for this explained in suitable terminological comments, encyclopaedic comments for example.

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5) It is not necessary either in French or English to place the prefix "inter-" before the words "linguistique/linguistic" and "culturel/cultural" as this meaning is understood in localization.

6) Term taken from the article by Mathieu Guidère (2004). See Reference [10], p. 73.

7) Texin, Tex (2003). See Reference [20], pp. 24-28.

8) Guidère, Mathieu (2004). See Reference [10], pp. 69-95.

9) Certain elements in the list are taken from Guidère, Mathieu (2004). See Reference [10], pp. 75 et 91.

6.11.2 Sociolinguistics and socioterminology aiding localization

Socioterminology is inspired by sociolinguistics. In this way, it establishes a correlation between specialized concepts and different sociolinguistic communities of the speakers. Thus, it constitutes a precious tool for localization, as in socioterminology the terms are perceived as units containing a describable identity value. This concept makes it possible to create a dictionary for each locale to standardize the translations and adaptations and to improve their quality.

6.11.3 Definition of contextualized or localized concepts

Any "contextualized" or "localized" concept necessarily includes a description containing adequate features to be able to produce a clear and precise mental image of the object (concrete or abstract) to which the concept refers.

The context refers to "all the circumstances in which a fact is produced[10])". For its part, localization is interested in the sociolinguistic factors surrounding the use of a word in a community. It can be noted that the two concepts do not oppose each other. On the contrary, they are compatible, even complementary. It is therefore possible to have a conceptual union which can be expressed as follows: a "contextualized" or "localized" concept contains all the sociolinguistic circumstances and factors essential for easy and efficient use of a term by a speaker in his daily work.

Of course, only the pertinent elements shall be used to describe the concepts. All the traits proposed above constitute a starting point for establishing a final list containing the descriptive characteristics suitable for making the use of the localized concepts profitable.

7 Methodology principles

7.1 General

In terminology, the work methodology consists of all the techniques and procedures adopted to arrive at a specific target, for example, the type of product or service to supply, taking into account the resources available, the expectations of the customer and the timetable agreed. Even if the methodology can be adapted en route, it is essential to define it before starting work.

Several methodological principles exist in terminology. Within the context of this Technical Report, we will limit ourselves to the usage, terminology variation and socioterminological acceptability.

7.2 Usage

It is normal practice to talk of usage, but it is an abstraction that often simplifies the reality. Usages should be used instead, each speciality having its own usages and types of discourse.

The first methodological requirement shall be to base the planning terminology work on the description of the usages as, although there is a need to plan the communication, it is conceivable — and daily experience with terminologies demonstrates this — that there is a multiplicity or plurality of usages, unless one is faced with a situation where the terminology is lacking in the targeted language. This is the case when speakers have recourse to a terminology in a foreign language or when the terminology has yet to be created (neology situation).

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10) Morvan, Danièle (dir.) (2002). See Reference [12], p. 348.

7.3   Terminology variation

The Utopian wish for the univocity of the technical term "one concept — one term" expressed many times comes up against different types of terminology variations in practice. The proliferation of synonyms for one and the same concept can be seen in almost all cases.

There are many reasons for this, in particular:

— the different points of view on a concept;

— the different competences for each of the concepts studied;

— the language registers, i.e. the degree of authority or familiarity that the speakers may have;

— the person addressed.

7.4   Socioterminological acceptability

At the selection stage when it is decided which designations to favour or create, the situational approach is added. This consists of involving the technolect speakers in the final choice so that the terminology proposed to the communities of targeted speakers will be accepted by everybody.

Terminology planners shall turn to the targeted speakers and involve them in their work. Even if it happens that terminology work is most often freely agreed from the point of view of the users and even often requested by the professional environment to which it is addressed, insofar as the users want reliable communication tools, they should be first tested with the terminology to find out their reactions and the choices adjusted as a result. The speakers in a given professional environment will have a greater propensity to use the terms appearing in a standard if they know that the choice has been made by their peers. One of the possible responses to the question of implantability of the terminology is to prepare it with the users, as a function of their communication requirements.

To do this, terminology implantation studies should be carried out so as to get some ground data on the socioterminological situations studied or to be studied. Terminologists cannot foresee everything. They can be mistaken in their terminology choices and realize that some recommended terms remain unused or are even rejected by the users. The procedures for drafting the terminology shall allow the choices to be reviewed and the terminology to be adjusted as a function of the reaction of the targeted users and, generally, as a function of the evolution of the usages.

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