Utgave 2:

Terminologi – ansvar og bevissthet

Det sjette terminologitoppmøtet – Oslo, 11. og 12. oktober 2012
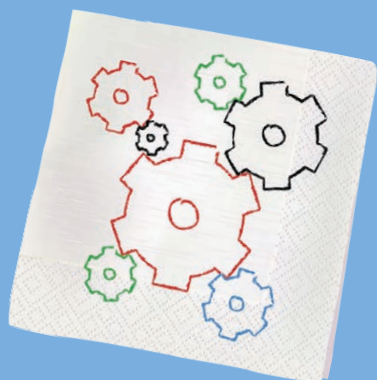
Terminology – responsibility and awareness

The sixth Terminology Summit – Oslo, 11th and 12th October 2012

Terminologie – responsabilité et sensibilisation

VIe Sommet de terminologie – Oslo, 11 et 12 octobre 2012

RAPPORT – PROCEEDINGS – ACTES

Jan Hoel (red.)

A Best-Practice Model for Term Planning (PhD summary)

DR ÚNA BHREATHNACH, TERMINOLOGY EDITOR
FIONTAR, DUBLIN CITY UNIVERSITY

Introduction

This paper gives a summary of PhD research undertaken in order to investigate good term planning. The motivations, methods and main findings are set out briefly. The thesis presents a best-practice model for term planning in a language planning context, based on the literature and on three qualitative case studies. A model for term planning is proposed, consisting of eight stages: preparation/planning, research, standardisation, dissemination, implantation, evaluation, modernisation/maintenance and training.

Background and motivation

Term planning in a language planning context is an important activity, as acknowledged by, among others, UNESCO (2005) and ISO (ISO 29383:2010). This importance is growing, as language communities become increasingly aware of the benefits of systematic terminology planning (UNESCO 2005, ii).

This thesis presents a general model for term planning which could be adapted to suit many language situations. A standardised model for term planning has potential value in several ways. Although the situations are different, the objectives of term planning organisations are generally similar, as are most of the working methods. Each organisation has to go through the same process of trial and error with regard to all the basic aspects of terminology. In many countries there is no organised terminology authority or organisation (in Spanish-speaking South America, for example: Pozzi 1996). A ready-made model of what has worked well in other cases would be useful for fledgling organisations. It would also be useful as a reference point for more established organisations, as a way to identify and justify improvements, to attract funding and to evaluate processes.

Despite this, much term-planning knowledge is not widely published: most of the resources on which terminologists rely are internal working documents, not easily accessible to the external researcher. Further, many terminology policies are not explicitly formulated, much less written down. This is problematic as it indicates limited sharing of expertise (Budin 2001, 14-15). It appears that relatively few sets of highly developed guidelines for term planning are made available publicly – those that are available are often, like Suonuuti (2001) or Bowman *et al.* (1997), extremely short.

A sociolinguistic approach

A sociolinguistic approach is taken here because the emphasis is on term planning for language planning purposes, and not for other kinds of term planning, such as term planning within an enterprise or as an academic research project. This implies a focus on the social use of terms, the view of language for special purposes and language for general purposes as a continuum rather than two separate categories, and the emphasis on de-terminologisation and popularisation as important factors in term use and diffusion. These are all highly relevant to many language situations, in which subject specialists may not create or use terms themselves, terms are often borrowed unchanged from English and other languages, and terminology is needed for 'popularisation' activities such as translation, journalism and education. If terms are to be 'liked, learned and used' (Fishman 1991), and if domain gain is to take place, then the social and linguistic situation must be carefully studied.

Terminology is regarded as an aspect of language planning, with important links to other aspects of this activity, particularly in the organisational and decision-making structures, and in dissemination of term resources. A close connection with language users is vital in planning and in research/ standardisation work, including research into language usage, and close interaction with opinion-leaders in language choice, particularly subject specialists and the media. Social aspects of term use are regarded as important, with an emphasis on usage and likely usage (implantability) in term choice and standardisation.

Sources

The model presented draws on several different kinds of source: textbooks, models given in particular publications by international organisations (chiefly UNESCO and ISO), works dealing with specific problems and publicly-available manuals for organisations or particular language situations. Many terminology policies are not explicitly formulated, however, much less written down. Looking at the literature, it is clear that some areas of term planning theory have been well elaborated, and there is general agreement; other areas are the subject of debate (though there are fewer of these debates than might be expected, given the volume of writing about termi-nology in the last fifty years); while in other areas there is not enough written to be able to clearly establish where things stand, and certainly no in-depth research. In nearly all cases, there is simply not enough material to be able to say that the literature suggests a consensus or a model, and sometimes there is not even consensus on what the topics for research are.

By looking at term planning organisations in their daily work, the assertions made in the literature can be tested and their importance weighted, and the areas not discussed (dissemination and marketing of term resources, for example, as well as the organisational structures that work best) can be

expanded. The result is a much more detailed model, with a firmer basis in experience.

In order to investigate the gaps in the term planning literature and to develop the model, a detailed investigation was carried out in 2009–2010 of practice in three term planning situations: TERMCAT (the term planning organisation for Catalan), Terminologicentrum TNC (the term planning organisation for Swedish) and the Irish-language term planning organisations, principally the Terminology Committee (Foras na Gaeilge) and Fiontar, Dublin City University. This research was carried out through a series of 26 in-depth interviews with key actors, which were then coded, analysed and compiled into reports.

Limitations

The model developed here is based on a limited data set. No claims can therefore be made about its universal usefulness and there is a danger of overestimating the importance of explanations discovered in case studies such as these (Collier and Mahoney 1996, 88). Assumptions are made for the purposes of the model about levels of financing, resources, staff, user and staff education and the state of development of the language itself, which are, of course, not valid in all term planning situations. There are considerable differences between the three cases from a sociolinguistic perspective. In all three cases, however, the languages are well developed and fully codified with well-established grammars, orthography and lexicons.

To tackle this issue, the model is designed to be very general, and none of the recommendations is language- or culture-specific. The model is an *ideal* and implementation depends on practical considerations. Furthermore, no matter what the specific sociolinguistic situation, the objectives of the type of term planning organisations considered in this research are broadly similar, as are most of the methods employed.

The importance of term implantation

An overview of the model developed is given in Figure 1. Because term planning is approached from a language planning point of view, term implan-tation is considered *the* critical factor and measure of success. Examination of the literature and of the cases themselves shows that implantation is a passive stage, however, and not something the term planning organisation can actively 'do', although actions taken by the term planning organisation do influence likely term implantation. Influencing factors include the active participation by representatives of the target audience in the research and decision-making processes; the quality of the terms themselves, including conciseness, absence of competing terms, derivative form capability and compliance with the rules of the language; and the timely provision of terms in easily accessible formats.

Less easily controlled factors could include acceptance by the media, which is in turn influenced by their involvement in term creation and dissemination; and public attitude to the language and to the discussion of specialised subjects in that language, which may be influenced by the awareness-raising work of the term-planning organisation.

Figure 1: Aspects of term planning
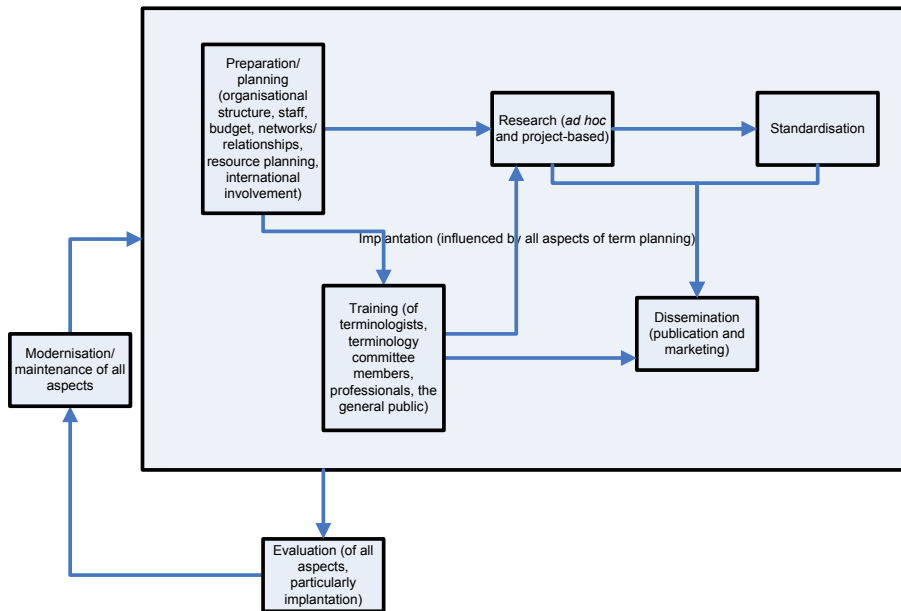
It seems clear, therefore, that implantation is affected by the planning, research, dissemination (publication and marketing) and training aspects of term planning work, as well as by the quality of the overall strategic planning. Implantation, if carefully evaluated, is a good measure of the term planning organisation's work as a whole, and it is therefore vital that it is assessed.

Aspects of term planning

The thesis presents the aspects and sub-aspects of terminology planning as practical measures, based on the case research and the literature. These are listed very briefly here.

Preparation/planning

Preparation and planning covers all the organisational aspects of term planning, including allocation of roles and functions to particular organisa-tions, staffing and financial arrangements, networks and relationships, as

well as resource planning and international involvement. The way in which preparation and planning are carried out affects all aspects of term planning work, including where, when, how and by whom they are done. The establishment of priorities (strategic planning) is particularly important in this regard.

Research

Term research can be divided into two distinct areas: *ad hoc* research and project-based research on a group of concepts or a dictionary (including research into *in vivo* term use, and *in vitro* term creation). Other kinds of research are also carried out, of course: research into new work methods; or research in order to compile style guides and manuals, as well as the kinds of research listed in the evaluation section below. It is always important to document the work carefully. This is important to guarantee quality, but also in training new staff members and in creating a basis for evaluation and modernisation. Besides *ad hoc* and project work, if the term planning organisation has a large terminology database, time will have to be set aside for the continuous updating and cleaning of that material.

A very large proportion of term provision may be done on an *ad hoc* basis, and not as part of term research projects. This is particularly the case for terms in current usage or newly emerging domains, or for particular user groups, such as the media. The ways in which this work is done are therefore important, and it must not be seen as an 'extra' task to be taken on as time permits, but as an integral part of the organisation's work. This was a significant difference between much of the literature and the experience of terminology practitioners in the cases studied.

Standardisation

In both the literature and the cases, there are different understandings of what terminology standardisation might mean. Most aspects of standardisation methods are unproblematic, however: for example, the need for a committee structure with expert and other representation.

For the purposes of this model, standardisation is considered to be the selection by a representative committee of recommended terms to be used in a defined field, such as in education or administration. It may be decided to only standardise a certain type of term, such as those over which there is controversy, or cases in which there is no agreed term, and where this causes problems. Or every term which has been thoroughly researched and discussed by a certain committee may be considered standardised.

This may or may not be reinforced by an element of obligation; for example, translators working for the government might have to use the standardised term in legal documents, as is the case for Catalan. Whether this is necessary or desirable depends on the language policy, on the language

situation and on the administrative culture: the use of standardised terms is not obligatory in Sweden or Ireland. In either case, standardisation must be supported by good term resources and effective dissemination, as well as agreement and cooperation in implementation; obligation alone is not sufficient (see, for example, Martin 1998). Standardisation can only be carried out in cases where comprehensive research (either *ad hoc* or as part of a terminology project) has been done.

Dissemination

Dissemination covers a broad field in terminology, including at least the following aspects:

* publication of term resources
* publication of information about terminology
* drawing the attention of users to resources
* creating debate about, interest in, and appreciation of terminology work

All this work is vital if term resources are to be used and implanted. The overall aim of dissemination should be to empower language users to use and actively engage with terminology resources. The term planning process is more effective, the more people are involved and interested in it; in fact, participation in the research process may be one of the best ways of guaranteeing term use. As with all language matters, a sense of ownership and involvement is important. Getting more language users and specialists involved is also useful for the terminologist, as it means a broader spread of information sources. It is also a way of bridging the gap between *in vivo* and *in vitro* term creation.

There is a need for close coordination with the media as an important user group. As well as being consumers of terminology, journalistic choices largely determine what terms language users will encounter, and, as a consequence, what terms will be implanted. They are the main mediators between term creators and end users. This is particularly the case for terms linked to current events. The media will have particular needs – and speed of response to *ad hoc* requests is very important. An example of media contact is TERMCAT's Antena de Terminologia, which is a distribution list comprising a broad membership of the media, used to spread information about new terms but also to gather information about *in vivo* term use and terminology needs.

Evaluation

Evaluation is a very important aspect of term planning; it allows for corrections and adjustments in the organisation's work, and positive evaluation is an important mark of progress. If evaluation is limited to 'push' factors such as term production alone, this will give an untrue portrait of term use and acceptance. Evaluation of implantation is – from a sociolinguistic perspective

– the most important measurement of the term planning organisation's success.

Training

There are at least four aspects to training, from the point of view of a term planning organisation. These are:

- training of terminologists (term planning organisation staff and future terminologists)
- training of specialists and others advising the terminologist
- training of professionals working closely with terminology
- training/education of the general public

Training work is important both to improve the quality and use of term resources, and to foster understanding of the use and importance of terminology. It is therefore closely related to dissemination and implantation work. The training of terminologists and of terminological advisers is vital to successful research work. Some types of training, such as research into term implantation conducted as postgraduate research, can also constitute evaluation.

Two types of professionals work with terminology: those for whom it is an object of work (language planners, terminographers, etc.), and those for whom it is a communication tool (subject field specialists). Both may benefit from the provision of training. Training is no substitute for providing clear, easily-used resources, however, and, as with general users, it should not be assumed that professionals have received training in terminology.

Modernisation/maintenance

Modernisation and maintenance are necessary in order to keep a high standard of work in each of the aspects of term planning. Modernisation is heavily reliant on the results of evaluation and on reacting in a positive way to findings.

Findings and conclusions

The model outlined here assumes that the term planning organisation works towards not only the provision but also the implantation of terms in the language. The importance of the media in term dissemination is cited throughout. Terminology work is most likely to be successful when it is carried out in an open, inclusive way, with the users involved as much as possible. This includes: public consultation in advance planning and preparation; extensive research into *in vivo* term usage; the most widespread dissemination possible; investment in marketing; research into term success; and user training. A term planning model should be both top-down and bottom-up. The bottom-up aspects of this model are particularly the

evaluation aspect, which is largely reliant on feedback from users, and the research aspect, in which as many users as possible are involved. The top-down aspects are the strategic planning and the dissemination and marketing work.

The case research corroborated the literature in some instances; other aspects repeatedly discussed in the literature appear less important in the cases. Interviewees in the cases acknowledged taking a pragmatic, case-based approach to the implementation of ISO standards, for example, and much terminology work – because it was on an *ad hoc* basis, or because the projects were too big – did not suit the ISO approach. Although termi-nology work should, it was agreed, be based on standardised principles and methods, and based on scientific theory, this was not always the case in practice. This illustrates the value of case-based research into real-life terminology work.

 An issue, mentioned by several authors (such as Gaudin 1994, 9), that came up in the case discussion of research, dissemination and training is the fact that LGP and LSP are not as separate as terminology theory sometimes claims – for terminologists or for terminology users. Users of language resources expect to find both in the same place, and do not make a distinction.

The most interesting finding from the case research, however, was the importance of aspects of term planning which are hardly mentioned in the literature. This is particularly so with methods of dissemination, in the sense both of publication, and of marketing and awareness-raising about term resources. Although these are essential for term implantation, they are hardly discussed in the literature. Similarly, there is little discussion in the literature of *ad hoc* term research, although this is just as important as project-based research in certain instances.

This paper has given a very short summary of the model for term planning elaborated in my PhD research, and a very limited overview of the sources used to research that model. It is to be hoped that, as terminology work continues to be discussed in forums such as EAFT, our understanding of best practice in term planning will continue to evolve.

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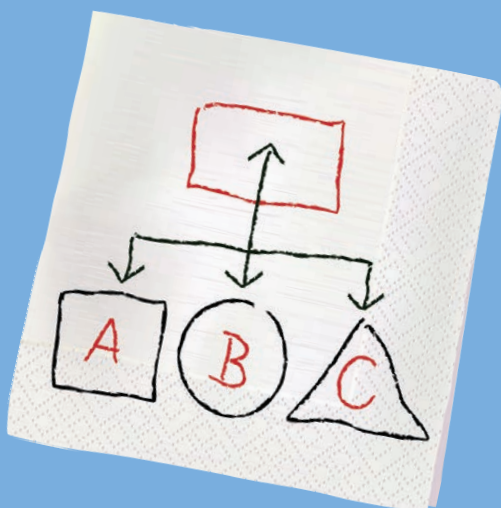
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Det sjette terminologitoppmøtet ble arrangert i Oslo i oktober 2012 av Språkrådet i samarbeid med Den europeiske terminologiforening (EAFT). Engelsk og fransk var konferansespråk. Arrangementet omfattet også et internasjonalt arbeidsseminar om nasjonale termbanker, *Termintra*. Denne andre utgaven av *Terminologen* inneholder foredragene fra toppmøtet, plakater som ble presentert, en oppsummering fra arbeidsseminaret og foredragene til de tre vinnerne av De internasjonale terminologiprisene, som ble delt ut under toppmøtet.

The sixth Terminology Summit was organized in Oslo in October 2012 by The Language Council of Norway (Språkrådet) in cooperation with The European Association for Terminology (EAFT). English and French were conference languages. The event also included an international workshop on national termbanks, *Termintra*. This second edition of *Terminologen* contains the talks given at the Summit, posters presented, a summary of the workshop and the talks of the three winners of The International Terminology awards given at the Summit.

Le VIe Sommet de Terminologie a été organisé à Oslo, en octobre 2012, par le Conseil norvégien de la langue (Språkrådet) en collaboration avec l'Association européenne de terminologie (AET). L'anglais et le français en étaient les langues officielles. Cet événement incluait également un atelier international consacré aux banques nationales de terminologie, *Termintra*. Ce deuxième numéro de *Terminologen* comprend le texte des interventions et des posters présentés durant le Sommet, un résumé de l'atelier ainsi que les exposés des trois gagnants des Prix de Terminologie.