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Translation projects — General guidance

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Translation projects — General guidance

Projets de traduction — Lignes directrices générales

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Foreword

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ISO/TS 11669 was prepared by Technical Committee ISO/TC 37, *Terminology and other language and content resources*, Subcommittee SC 2, *Terminographical and lexicographical working methods*.

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Introduction

This Technical Specification reflects the variety of projects that translation service providers (TSPs) carry out. It provides guidance concerning best practices for all phases of a translation project. It will also be useful to institutions that train and educate translators. It is not meant to compete with current regional and national standards, but is intended to improve communication among all relevant stakeholders in a translation project, including the persons requesting the translation service, those providing the service and those who make use of the resulting translation product. It is based in part on translation service standards adopted in Canada[7], China[8] [9], Europe[5] and the United States[6].

An organizing principle of this Technical Specification is the importance of structured specifications in translation projects (as elaborated in Clauses 6 and 7). A system is described for making decisions about how translation projects are to be carried out. Those decisions — project specifications — then become a resource for both the requester (the party that requests a translation product, sometimes called the client or customer) and the translation service provider throughout all phases of a translation project. Translation project specifications can be attached to a legally binding contract to define the work to be done. In the absence of a contract, they can be attached to a purchase order or other document supporting the request. Project specifications can be developed and used both within and outside commercial customer-vendor relationships.

A basic and implicit translation project specification is that the target content be readable in the target language and correspond in some way to the source content. However, the nature of the correspondence between the source and target contents will vary according to the needs of the project, as determined by the project specifications.

In practice, requesters do not always provide project specifications. However, that is not best practice. Requesters and TSPs should work together to determine project specifications. Those who do so are more likely to be satisfied with both the translation project and the final translation product. When both requesters and TSPs agree on project specifications, the quality of a translation — from a workflow and final delivery perspective — can be determined by the degree to which the target content adheres to the predetermined specifications. All parties involved in the production of a translation product should have access to the necessary project specifications.

After the requester receives the final translation product, the role of the project specifications does not end; they are the starting point for all assessments, both qualitative and quantitative. Any assessment standards would therefore benefit from taking into account the system of structured specifications presented in this Technical Specification. Keeping the translation product and the project specifications together provides a uniform basis for assessment. The project specifications can be used to guide assessments made by either the TSP or the end user. The use of the same specifications by all parties avoids assessment based on personal opinions of how source content should be translated. In some cases, the specifications themselves will be found to be unclear or ill-advised. In other cases, it will be determined that the specifications were not followed. In all cases, the use of project specifications can improve communication within the document production chain and promote ongoing improvement.

In summary, quality translation *projects* and quality translation *products* result from developing and following appropriate project *specifications*.

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Translation projects — General guidance

1 Scope

This Technical Specification provides general guidance for all phases of a translation project. Its main purpose is to facilitate communication among the parties involved in a project. It is intended for use by all stakeholders of the translation project, including those who request translation services, those who provide the services and those who make use of the results of the project — in particular, the translation product. It applies to multiple sectors, including the commercial and government sectors, and non-profit organizations.

It provides a framework for developing structured specifications for translation projects, but does not cover legally binding contracts between parties involved in a translation project. It addresses quality assurance and provides the basis for qualitative assessment, but does not provide procedures for quantitative measures of the quality of a translation product.

It is not applicable to interpreting services.

2 Terms and definitions

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

2.1 Translation terms

2.1.1
translate
render information in the *source language* (2.1.2) into the *target language* (2.1.3) in written form

2.1.2
source language
language from which content is translated into the *target language* (2.1.3)

2.1.3
target language
language into which content is translated from the *source language* (2.1.2)

2.1.4
source content
text and other content to be *translated* (2.1.1)

Note to entry: The source content for a translation project can, for example, range in size and complexity from a single road sign to a one-page document, set of large documents or user interface for a complex software system.

2.1.5
target content
text and other content translated from the *source content* (2.1.4)

Note to entry: *Target content* and *translation product* (2.1.9) are related terms. Translation product generally refers to content at a late stage or at the end of a translation project, after the content has undergone translation and other translation services such as *revision* (2.2.2.2) or *review* (2.2.2.3). Target content generally refers to content as it is undergoing translation and translation services.

2.1.6
A-language
native language, or language that is equivalent to a native language, into which the translator typically translates from his or her *B-language* (2.1.7) and/or *C-language* (2.1.8)

Note to entry: The A-language is generally the language of education and daily life for a translator.

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2.1.7
B-language
language, other than a translator's native language, of which the translator has an excellent command and from which the translator typically translates into his or her *A-language* (2.1.6)

2.1.8
C-language
language of which a translator has a complete understanding and from which the translator sometimes translates into his or her *A-language* (2.1.8)

Note to entry: A translator can have several C-languages.

2.1.9
translation product
content created through the process of *translation* (2.2.2.1) and other translation services

Note to entry: *Translation product* and *target content* (2.1.5) are related terms. Translation product generally refers to content at a late stage or at the end of a translation project, after the content has undergone translation and other translation services such as *revision* (2.2.2.2) or *review* (2.2.2.3). Target content generally refers to content as it is undergoing translation and translation services.

2.1.10
locale
value that reflects the language, local conventions and culture of a geographic region

Note to entry: Local conventions can include specific formatting rules for dates, times and numbers, as well as other conventions and preferences.

EXAMPLE French Canada (fr-CA), Chinese Singapore (zh-SG).

2.1.11
overt translation
type of *translation* (2.2.2.1) in which aspects of the *source language* (2.1.2) and source culture are intentionally left visible

2.1.12
covert translation
type of *translation* (2.2.2.1) intended to make the *translation product* (2.1.9) appear as though it had been authored originally in the *target language* (2.1.3) and target culture

2.1.13
translation memory
electronic collection of source- and target-language segment pairs

Note 1 to entry: A segment is typically a sentence, bullet point, or header.

Note 2 to entry: The purpose of a translation memory is to facilitate the retrieval and use of previously translated content.

2.1.14
bi-text
text segmented and linked to corresponding segments of target text

2.1.15
competence
ability to apply knowledge and skills to achieve intended results

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2.2 Translation project terms

2.2.1 Terms related to stakeholders

2.2.1.1
requester
person or organization requesting a translation service from a *TSP* (2.2.1.2) or *language service provider* (2.2.1.3)

Note 1 to entry: The *requester* is usually the person or organization that asks for, and receives, the *translation product* (2.1.9) on behalf of the end users, and that usually directly or indirectly determines the TSP's compensation for rendering the translation service. In the case of government or non-profit organizations, pro-bono transactions, or in-house translation within a company, there is sometimes no monetary compensation for translation services.

Note 2 to entry: In the commercial sector, the requester is sometimes called the client or customer. These terms, however, are ambiguous and could refer to the *end user* (2.2.1.6). For this reason, *requester* is the preferred term.

2.2.1.2
TSP
translation service provider
person or organization supplying a translation service

EXAMPLE Translation companies, translation agencies, freelance translators, in-house translators, revisers, reviewers, translation organizations (profit, non-profit or governmental).

Note 1 to entry: The concepts of *TSP* and *language service provider* (2.2.1.3) are connected by a generic relation, with language service provider being the generic concept and TSP the specific concept. TSPs generally provide only translation services, which can include *revision* (2.2.2.2) or *review* (2.2.2.3). Depending on their qualifications and abilities, TSPs can provide other services.

Note 2 to entry: Often a larger *TSP* asks several smaller TSPs to each take care of part of a translation project — for example, translation into one target language each. There can be even more than two levels of providers. However, in such cases, each TSP is considered to be a provider, not a *requester* (2.2.1.1). Only the person or organization making the initial request to the highest-level TSP is called the requester in this document.

2.2.1.3
language service provider
LSP
person or organization that provides translation, interpreting and/or other language-related services such as transcription, terminology management or voice-overs

Note 1 to entry: The concepts of *language service provider* and *TSP* (2.2.1.2) are connected by a generic relation, with language service provider being the generic concept and TSP the specific concept. TSPs generally provide only translation services, which can include *revision* (2.2.2.2) or *review* (2.2.2.3). In some cases, language service providers provide mainly translation services but in many languages.

Note 2 to entry: LSP is also an abbreviation for "Language for specific purposes"; in this Technical Specification, however, LSP refers only to language service provider.

2.2.1.4
translator
person who *translates* (2.1.1)

2.2.1.5
freelance translator
translator (2.2.1.4) who typically provides outside services for several requesters directly or several *TSPs* (2.2.1.2) or a combination of the two, on a per project basis

2.2.1.6
end user
person or group of persons who ultimately make use of the *translation product* (2.1.9)

Note to entry: The *end user* is often not the same entity as the *requester* (2.2.1.1).

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2.2.1.7
reviser
person who performs *revision* (2.2.2.2)

2.2.1.8
reviewer
person who performs *review* (2.2.2.3)

2.2.2 Terms related to translation project tasks

2.2.2.1
translation
process of *translating* (2.1.1)

2.2.2.2
revision
bilingual editing of *target content* (2.1.5) based on a comparison between the *source content* (2.15) and the target content

2.2.2.3
review
monolingual editing of *target content* (2.1.5) with respect to the conventions of the *subject field(s)* (2.3.2) to which the target content belongs

2.2.2.4
localization
process of adapting products and services for distinct *locales* (2.1.10)

Note to entry: *Localization* consists of 1) the translation of textual materials according to the target locale, and 2) adaptation of non-textual materials to the same locale. It includes input, output and delivery mechanisms.

2.2.2.5
back translation
translation (2.2.2.1) of the *target content* (2.1.5) back into the *source language* (2.1.2)

Note to entry: Back translation can be misunderstood or misused. See discussion of back translation in 7.3.2 for details.

2.2.2.6
machine translation
process in which *source content* (2.1.4) is given to a computer system and *target content* (2.1.5) is produced without human intervention

2.2.2.7
raw machine translation
output of *machine translation* (2.2.2.6) prior to *post-editing* (2.2.2.8)

2.2.2.8
post-editing
revising *raw machine translation* (2.2.2.7)

2.2.3 Terms related to project specification framework

2.2.3.1
project specification
value for a *translation parameter* (2.2.3.2) relative to a particular translation project

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2.2.3.2
translation parameter
one of a set of key factors, activities, elements and attributes of a given project used for creating *project specifications* (2.2.3.1)

Note 1 to entry: The set of *translation parameters* as enumerated in 7.2 is applicable to all translation projects and the translation parameters' values (project specifications) are to be determined for each project to fully define the conditions and output of *translation* (2.2.2.1).

Note 2 to entry: There are multiple categories of *translation parameters*, including linguistic parameters, production parameters and environment parameters.

Note 3 to entry: In the context of translation projects, the term *translation parameter* is often referred to simply as "parameter" for practicality.

2.2.3.3
translation sub-parameter
subdivision of a *translation parameter* (2.2.3.2)

EXAMPLE Sub-parameter 19a: Copyright.

2.3 Linguistic terms

2.3.1
text type
class to which content is assigned based on its function, format or the intention of the author with respect to the target audience

2.3.2
subject field
domain
field of activity characterized by a specific body of knowledge, terminology and phraseology

2.3.3
register
usage register
set of properties that is characteristic of a particular type of content, and which takes into account the nature of the relationship between the creator and audience, the subject treated and the degree of formality or familiarity of the content

2.3.4
interpreting
rendering of the spoken or signed information in a *source language* (2.1.2) into a *target language* (2.1.3) in oral or signed form

3 Working together — Requesters and translation service providers (TSPs)

3.1 Division of labour

This clause provides requesters with suggestions on how to identify an appropriate TSP for translation projects. Additionally, TSPs can review it to determine the conditions under which they should or should not accept work that is offered by requesters.

The division of labour between the requester and the TSP can vary widely; many tasks can be performed by either the requester or the TSP. For this reason, the division of labour should be determined and formalized in the project specifications (see Clause 6).

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3.2 Selecting TSPs

3.2.1 Different types of TSPs

3.2.1.1 In-house TSPs

When applicable, requesters can select TSPs from within their own organizations. Otherwise, requesters can choose to outsource their content to TSPs.

When applicable, TSPs can choose in-house staff to translate the requester's content. The TSP also has the option to outsource the content to other TSPs.

3.2.1.2 Multi-person TSPs

Multi-person TSPs are often translation companies. They often have a larger translation capacity than freelance translators.

Multi-person TSPs can employ other TSPs, including freelance translators. Often a larger TSP, sometimes called a language service provider, asks several smaller TSPs to each take care of part of a translation project — for example, translation into one target language each. There can be even more than two levels of providers. However, in such cases, each TSP is considered to be a provider, not a requester.

3.2.1.3 Freelance translators

A freelance translator is a TSP acting as an individual.

When requesters work directly with freelance translators, a project manager should be designated who will assume responsibility for developing the project specifications based on the initial requirements of the requester (see 5.2). The project manager should also ensure that the specifications are adhered to throughout the project, particularly in the production and post-production phases (details given in 5.3 and 5.4, respectively).

When the agreed-upon project specifications call for a translation to be revised, the revision should be performed by someone other than the translator. The exception to this practice is when there is no one available who is more qualified than the translator to revise the translation product; in that case, the translator should do a thorough revision of his or her own work. However, requesters and TSPs should be aware that some regional and national translation standards require, with limited exceptions, that someone other than the translator revise every translation. Freelance translators can fulfil this requirement by making arrangements with other TSPs to revise their work.

3.2.2 Selecting an appropriate TSP

Before selecting a TSP, requesters should first define the preliminary project specifications (see 5.2.3), which will aid them in determining the best types of TSPs for a project (i.e. whether to outsource the translation project and to whom, or to keep the project in-house).

It is the responsibility of the requester to choose an appropriate TSP that meets the needs of the project. The requester should search for and select a TSP that applies a structured specification approach to translation projects (see Clauses 6 and 7). Requesters should also select TSPs that have the necessary competences as described in 3.2.3 to 3.2.4.

Providing specific measures of competence (i.e. scores and numbers) for individuals is beyond the scope of this document because of its international reach and because each translation project has unique needs and specifications.

Upon request, TSPs should provide any desired information to the requester for evaluation.

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3.2.3 Competences of translators and revisers

3.2.3.1 Source- and target-language competence

For a translator, the ability to read the source language and the ability to write in the target language are both critical, but those qualifications alone are not sufficient for either translators or revisers. Indications of true source and target language competence include

— length of experience providing professional translation services in the relevant language combination and subject field,

— amount of university-level study in source language or target language,

— amount of university-level specialization in relevant subject fields,

— scores on standardized language proficiency tests, and

— period of language immersion or residence in a country or region where either language is the dominant language.

When relevant, a translator should demonstrate competence in the necessary language variants (i.e. Arabic Egypt), especially in the target language.

3.2.3.2 Translation competence

In addition to demonstrating language competence, translators and revisers should demonstrate translation competence in the given language pair and direction. For example, French-to-English and English-to-French are the two directions of the language pair French and English. Considerations for determining whether a translator or reviser is competent in translation include, among others,

— a degree in translation from a university or college,

— length of experience providing professional translation services in the relevant combination of languages,

— certification from an official translation industry body or an internationally recognized translator association umbrella organization,

— references from previous work, and

— when possible, and without violating confidentiality, samples of previous work.

3.2.3.3 Other competences

Revisers should have additional competences to those of a translator (see 3.2.4).

In addition to language, subject field and translation competence, translators and revisers should have competence in the following additional areas:

— prior translation experience with the given project's text type (patent, corporate annual report, software user interface, etc.),

— understanding of the translation project phases and the structured specification approach as described in this Technical Specification,

— proficiency in using the technology that is required by the project specifications,

— research skills in finding both subject-field information and target-language terminology that are relevant to the given project,

— understanding of the source and target cultures,

— social skills needed to function effectively on a translation team, and interact with stakeholders in the translation process, and

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