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Translation projects — General guidance

Projets de traduction — Recommandations générales

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Foreword

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

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

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

This document was prepared by Technical Committee ISO/TC 37, *Language and terminology*, Subcommittee SC 5, *Translation, interpreting and related technology*.

This first edition cancels and replaces ISO/TS 11669:2012, which has been technically revised.

The main changes are as follows:

— there is an increased focus on the requester's and translation service provider's shared responsibility in developing translation project specifications;

— a description has been added of the key role that risk assessment plays, together with the initial needs analysis, in setting up the translation project;

— the informative annexes have been updated.

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

Introduction

The translation industry is changing rapidly and globalization is driving increased demand for translation. Technological innovation has stepped up to provide solutions designed to meet these needs, including making use of artificial intelligence and machine translation. Anyone who needs translation services has many options to choose from. To obtain translation output that meets requirements, those who need translation services should have a basic understanding of what a translation project involves. They should also know how efficient communication with a translation service provider (TSP) can help to ensure a successful translation project.

Efficient communication entails that requirements are explicitly defined and agreed-upon as translation project specifications. Successful translation projects are a result of:

— developing and following these translation project specifications,

— involving people with the appropriate competences and qualifications, and

— assuring smooth communication flows throughout the projects.

This document is primarily intended for persons who request translation services, but it can be useful for all stakeholders in a translation project, such as TSPs and end users.

Translation projects — General guidance

1 Scope

This document gives general guidance on all stages of a translation project. Its main purpose is to ensure efficiency and quality by enhancing communication among the parties involved in the translation project.

This document provides a framework for developing translation project specifications that are the basis for requesting, setting up, managing and evaluating translation projects. It also includes guidance on needs analysis, risk assessment and workflows, but it does not provide procedures for evaluating the quality of translation output.

This document is primarily intended for those who request translation services. However, it can also be relevant for the translation service providers and the end users of the translation output.

It is applicable to all sectors, including the commercial and government sectors, and non-profit organizations.

It does not apply to interpreting services.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 20539:2023, *Translation, interpreting and related technology — Vocabulary*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 20539 and the following apply.

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

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

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

3.1 General concepts

3.1.1
source language content
content to be translated

[SOURCE: ISO 20539:2023, 3.1.5, modified — “or interpreted” has been removed in the definition.]

3.1.2
target language content
content translated from a source language

[SOURCE: ISO 20539:2023, 3.1.6, modified — “or interpreted” has been removed in the definition.]

3.1.3
translation service
production and delivery of *target language content* (3.1.2) according to *translation project specifications* (3.2.5)

[SOURCE: ISO 20539:2023, 3.3.4, modified — "specifications issued by a client" has been replaced by "translation project specifications" in the definition.]

3.1.4
revision
bilingual editing
bilingual examination of *target language content* (3.1.2) against *source language content* (3.1.1) for its suitability for the agreed purpose

[SOURCE: ISO 17100:2015, 2.2.6, modified — "bilingual editing" has been added as an admitted term. Note 1 to entry has been removed.]

3.1.5
review
monolingual editing
monolingual examination of *target language content* (3.1.2) for its suitability for the agreed purpose

[SOURCE: ISO 17100:2015, 2.2.7, modified — "monolingual editing" has been added as an admitted term. Note 1 to entry has been removed.]

3.1.6
proofreading
examination of the final *target language content* (3.1.2) and application of corrections before submission to the client

[SOURCE: ISO 20539:2023, 3.3.12, modified — "proofread" has been replaced by "proofreading" as the term. "examine" has been replaced by "examination of" and "apply" has been replaced by "application of" in the definition.]

3.1.7
evaluation of translation output
evaluation
bilingual examination of *target language content* (3.1.2) against *source language content* (3.1.1) while classifying any errors with respect to translation evaluation specifications and for the purpose of reaching a *quality* (3.2.2) rating

[SOURCE: ISO 5060:2024, 3.1.4, modified — Note 1 to entry has been removed.]

3.1.8
post-editing
checking and correcting of *machine translation* (3.4.2) output

[SOURCE: ISO 20539:2023, 3.5.1.13, modified — "editing and correcting" has been replaced by "checking and correcting of" in the definition.]

3.2 Concepts related to translation projects

3.2.1
requirement
need or expectation that is stated, generally implied or obligatory

Note 1 to entry: "Generally implied" means that it is custom or common practice for the organization and interested parties that the need or expectation under consideration is implied.

[SOURCE: ISO 9000:2015, 3.6.4, modified — Notes 2 to 6 to entry have been removed.]

3.2.2
quality
degree to which a set of inherent characteristics of an object fulfils *requirements* (3.2.1)

Note 1 to entry: The term "quality" can be used with adjectives such as poor, good or excellent.

Note 2 to entry: "Inherent", as opposed to "assigned", means existing in the object.

[SOURCE: ISO 9000:2015, 3.6.2]

3.2.3
translation project
coordinated and controlled activities, with start and finish dates, set up to deliver a *translation service* (3.1.3)

3.2.4
translation project parameter
translation parameter
attribute of a *translation project* (3.2.3)

3.2.5
translation project specification
defined and agreed upon *requirement* (3.2.1) that is related to a *translation project parameter* (3.2.4) and that is used for producing translation output

3.2.6
quality check
examination of *target language content* (3.1.2) to determine its conformance to *translation project specifications* (3.2.5)

Note 1 to entry: In-process quality checks, such as *revision* (3.1.4), *review* (3.1.5) or *proofreading* (3.1.6), take place during the execution (production) stage of a *translation project* (3.2.3).

Note 2 to entry: Quality checks for specific aspects of the target language content, such as spelling, terminological consistency and completeness, can be performed with the help of tools.

Note 3 to entry: *Evaluation of translation output* (3.1.7) is a form of quality check that includes measurement and that often takes place after the execution (production) stage of a translation project.

3.2.7
use case
description of a specific situation in which an output or service can potentially be used

3.2.8
service level
performance targets for a service

[SOURCE: ISO/IEC 17826:2022, 3.49]

3.2.9
risk
effect of uncertainty on objectives

Note 1 to entry: An effect is a deviation from the expected — positive and/or negative.

Note 2 to entry: Objectives can have different aspects (such as financial, health and safety, reputational and environmental goals) and can apply at different levels (such as strategic, organization-wide, project, product and process).

[SOURCE: ISO 31000:2018, 3.1, modified — Notes 1 – 3 to entry have been removed and replaced with new Notes 1 and 2 to entry.]

3.2.10
risk assessment
overall process of *risk* (3.2.9) identification, risk analysis and risk evaluation

[SOURCE: ISO Guide 73:2009, 3.4.1]

3.2.11
risk management
coordinated activities to direct and control an organization with regard to *risk* (3.2.9)

[SOURCE: ISO 31000:2018, 3.2]

3.2.12
risk tolerance
organization's or stakeholder's readiness to bear the *risk* (3.2.9) in order to achieve its objectives

Note 1 to entry: Risk tolerance can be influenced by legal or regulatory *requirements* (3.2.1).

[SOURCE: ISO Guide 73:2009, 3.7.1.3, modified — "after risk treatment" has been deleted from the definition.]

3.3 Concepts related to people involved in translation projects

3.3.1
requester
person or entity making enquiries with the view of commissioning a *translation service* (3.1.3)

Note 1 to entry: The requester usually receives the translation output for their own use or on behalf of the end users.

Note 2 to entry: In situations where the requester proceeds to commission a translation service, they can also be considered as a client from the perspective of the translation service provider that will provide the translation service.

3.3.2
translator
person who renders *source language content* (3.1.1) into *target language content* (3.1.2) in written or other recorded form

[SOURCE: ISO 20539:2023, 3.1.12, modified — "translates" has been replaced by "renders source language content into target language content in written or other recorded form" in the definition.]

3.3.3
language professional
person who has the competences and qualifications to perform tasks in translation and translation-related services

EXAMPLE *Translator* (3.3.2), reviser, post-editor, evaluator.

Note 1 to entry: A language professional can be a translation service provider (TSP).

3.3.4
target audience
person or group of persons for whom *source language content* (3.1.1) or *target language content* (3.1.2) is intended

[SOURCE: ISO 10209:2022, 3.14.42, modified — "person or" has been added at the beginning of the definition. "information for use" has been replaced by "source language content or target language content" and "by the supplier" has been removed.]

3.4 Concepts related to translation technology

3.4.1
translation memory
TM
digital repository of aligned *source language content* (3.1.1) and *target language content* (3.1.2)

[SOURCE: ISO 20539:2023, 3.5.1.6, modified — "used to store and retrieve previously translated content matched with source language content" has been replaced by "of aligned source language content and target language content".]

3.4.2
machine translation
MT
automated translation of content from one natural language to another using software

[SOURCE: ISO 20539:2023, 3.5.1.8]

3.4.3
unedited machine translation output
UEMT output
raw machine translation output
output of *machine translation* (3.4.2) that has not been *post-edited* (3.1.8)

3.4.4
termbase
terminology database
database comprising a terminological data collection

[SOURCE: ISO 30042:2019, 3.28]

4 Context of translation projects

4.1 General

Translation projects are set up when someone needs to transform content in written form from one language into one or several other languages. For a translation project to produce a result that meets the requester's and the end users' needs and expectations, the stakeholders should agree on translation project specifications based on the relevant requirements. The translation project specifications should be created with reference to translation project parameters and should play a central role at all stages of the translation project.

This document structures the guidance on translation projects according to the following stages of a translation project.

— The initiation stage is a preparation stage where the requester carries out an initial needs analysis and a risk assessment and selects a TSP.

— The planning (or pre-production) stage builds on the result of the analysis conducted during the initiation stage. It includes the preparation of the source language content and the development, finalization and documentation of the translation project specifications.

— The execution (or production) stage involves creating the translation output in conformance with the agreed-upon translation project specifications.

— The closing (or post-production) stage covers the exchange of feedback and, where appropriate, the evaluation of translation output based on the translation project specifications.

In addition, this document gives guidance on two transversal activities that are essential throughout translation projects: risk management and project communication.

Figure 1 gives an overview of the main elements of each stage.

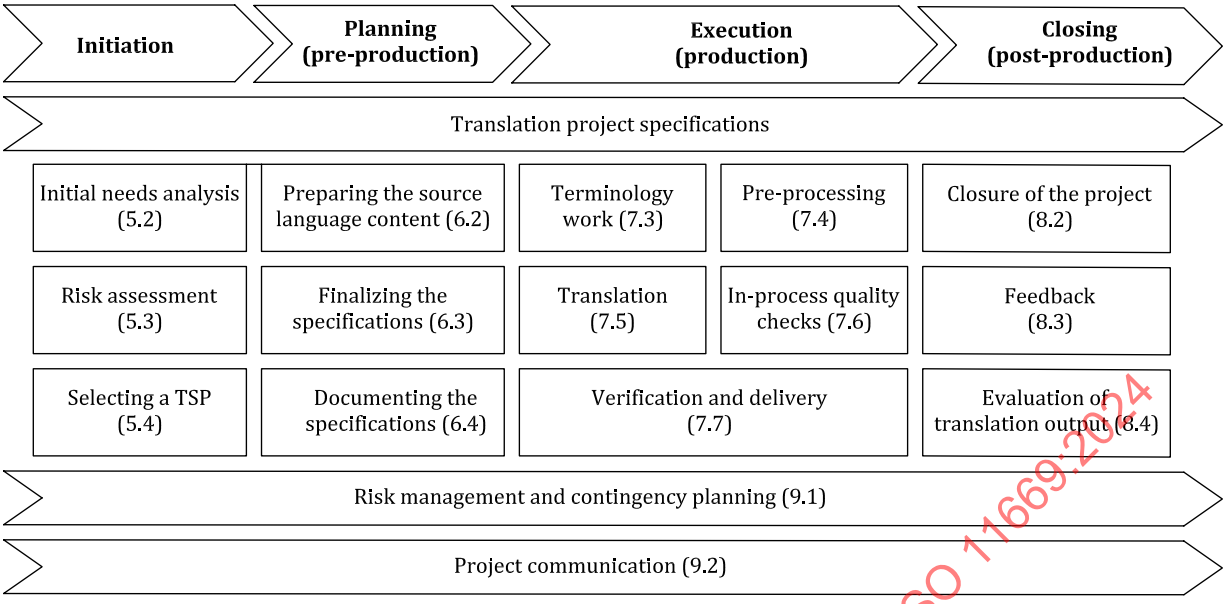


Figure 1 — Translation project stages

4.2 Translation standards

This document aims to complement other standards in the field of translation. ISO 17100, ISO 20771 and ISO 18587 define requirements for translation services.

The processes set out in these International Standards can be used to provide translation services for different use cases. The TSPs can advise the requesters on the appropriate standard to apply based on the requirements.

ISO 5060 gives guidance on the evaluation of translation output.

There is currently no International Standard that sets requirements for the use of unedited machine translation (UEMT) output. For more information on using UEMT output, see Annex A.

4.3 Translation project parameters

Translation project parameters are used to transform requirements into translation project specifications. This document recommends that translation project specifications always be created using translation project parameters. This approach ensures that all requirements relevant for a specific translation project are defined and agreed upon in a structured way. The full set of translation project parameters is organized into the following three categories:

a) Content parameters, which include languages and locales, type of content, target audience, purpose, domain, terminology, content correspondence, style, language register, target language conventions, format, complexity, origin and volume.

b) Process parameters, which include technology, pre-processing, translation, in-process quality checks and additional tasks.

c) Other project parameters, which include risks, reference material, workplace requirements, permissions, qualifications, security, confidentiality, delivery, compensation and communication.

Table 1 illustrates how to use a translation project parameter to define relevant translation project specifications with the help of guiding questions.

Table 1 — Example of how to use a translation project parameter

Translation project parameter	Guiding questions	Translation project specifications
Purpose	Why is the translation output needed? How will it be used?	EXAMPLE 1 For use in court. EXAMPLE 2 Marketing of a product. EXAMPLE 3 Information for personal use.

Annex B provides a detailed description of all translation project parameters and examples of guiding questions and resulting translation project specifications for each translation project parameter. The requester can use the examples of guiding questions to carry out their initial needs analysis (see 5.2). Once the requester has selected a TSP, the TSP can guide the requester to ensure that all relevant translation project parameters for a given translation project have been adequately addressed.

Clause 5 and Clause 6 describe how translation project parameters can be used during the initiation and planning stages to develop translation project specifications. Annex C contains a checklist that covers the steps for developing the translation project specifications and lists the parameters relevant for each step.

5 Initiation stage

5.1 General

Before a translation project is set up and a translation service is commissioned, the requester should carefully analyse their needs and the risks involved. At this stage, the requester should also select a TSP or TSPs who will carry out the translation project. Once the requester is ready to commission a translation service, the requirements identified during the initial needs analysis and risk assessment should be communicated to the TSPs, so that they can advise on the appropriate course of action to meet the needs and address the risks.

5.2 Initial needs analysis

The initial needs analysis should cover at least the type of content that needs to be translated and the use case. Table 2 contains the translation project parameters relevant to the initial needs analysis. It also includes guiding questions.

Table 2 — Translation project parameters for the initial needs analysis

Translation project parameter	Guiding questions	Translation project specifications
Language and locale	Which source and target languages or language variants are concerned?	EXAMPLE 1 British English into Canadian French. EXAMPLE 2 British English into Brazilian Portuguese. EXAMPLE 3 Estonian into Swedish and Finnish.
Type of content	What type of content needs to be translated?	EXAMPLE 1 A contract. EXAMPLE 2 A brochure. EXAMPLE 3 A website. EXAMPLE 4 A user interface. EXAMPLE 5 A tweet.
Purpose	Why is the translation output needed? How will it be used?	EXAMPLE 1 For use in court. EXAMPLE 2 Marketing of a product. EXAMPLE 3 Information for personal use.
Target audience	Whom is it for? Who will read or use it?	EXAMPLE 1 General public who will visit the organization's website. EXAMPLE 2 A customer.
Volume	How large is the translation volume?	EXAMPLE 1 A one-off request of 2 500 words. EXAMPLE 2 1 000 words per week.
Delivery deadline	How urgent is the request? By when is the translation output needed?	EXAMPLE 1 Needed in 10 working days. EXAMPLE 2 Needed by tomorrow 2 p.m.

The replies to the questions can guide the requester in choosing a TSP (see 5.4 for more information on selecting a TSP or TSPs).

These replies are also necessary for the TSP to be able to develop a quotation and to advise on the selection of the translation service (e.g. translation, localization, audiovisual translation, summary translation). See Annex D for more information on different types of translation services.

5.3 Risk assessment

The requester should reflect on the risks related to the translation output and its use. Table 3 lists some guiding questions and resulting translation project specifications for determining the risks. See Table B.4 for further guiding questions related to risks.

Table 3 — Translation project parameter for risk assessment

Translation project parameter	Guiding questions	Translation project specifications
Risks	What are the risks related to the translation output and its use? What potential consequences would translation errors have for the stakeholders?	EXAMPLE 1 Risks: Risk of miscommunication, reputational risk, financial risk, risk of data loss or data breach, legal risk, risk of property damage, risk of injury or death. EXAMPLE 2 Consequences: Impaired communication, reputational damage, loss of clients, missed business opportunities, property damages, data breach, litigation, financial penalties, injuries, death.

The replies to the risk-related questions are necessary for the TSP to:

— engage with the requester in a discussion concerning tolerance for various kinds of errors, for example with regard to the fluency of the target language content or the correspondence between source and target language content; and

— provide the requester with advice on the appropriate production method (e.g. human translation, machine translation), workflow and risk mitigation measures (e.g. revision, review, user testing).

If unedited machine translation is being considered for the method of production, Annex A should be consulted.

When carrying out the risk assessment, the requester and the TSP can refer to ISO 31000 on risk management guidelines, ISO/IEC 27005 on information security risk management or use a risk matrix to visualize the requester's risk tolerance level. For an example of a risk matrix for translation output, see Reference [15].

5.4 Selecting a translation service provider

TSPs specialize in different language services (e.g. localization, audiovisual translation), specialized domains (e.g. law, medicine), specialized language combinations and preferred translation technology. The requester should select a TSP or TSPs that have the necessary competences, capacities and resources to meet the identified needs of the translation project.

Translation projects can involve different actors or stakeholders, such as requester, project manager, translator, reviser or end user. The distribution of tasks among these actors can vary. For example, a requester can also carry out the tasks of a project manager.

It is important to work with competent language professionals. Language professionals involved in a translation project should have as a minimum the competences of a translator (see ISO 17100:2015, 3.1.3, for translator competences and ISO 17100:2015/Amd 1:2017, 3.1.4, for qualifications). Additional requirements apply to post-editors, revisers and evaluators (see ISO 18587:2017, 5.1, ISO 17100:2015, 3.1.5, and ISO 5060:2024, 4.2). For legal translation services conforming to ISO 20771 there are also specific additional requirements for translators, revisers and reviewers (see ISO 20771:2020, Clause 5).

For larger translation needs or projects with a long duration, the requesters can define their requirements, for example, by way of calls for tenders or requests for proposals. This way of requesting information can make it easier to compare TSPs or to identify those that best meet the needs and expectations.

For small projects or occasional translation needs, when working with a new TSP or when there is no written agreement already in place, the requester can provide the TSP with the results of the initial needs analysis and the risk assessment and ask for a quotation. The requester can ask the TSP to include certain information in the quotation or to use certain units (e.g. lines, words, characters), to make it easier to compare quotations from different TSPs. If the requester has asked for quotations from several TSPs, they should consider what is included in the basic price. Annex E includes a checklist with questions to consider when selecting a TSP.

6 Planning (pre-production) stage

6.1 General

The planning stage comprises the requester's preparation of the source language content and further development, finalization and documentation of the translation project specifications together with the chosen TSP. These specifications should be defined in relation to the translation project parameters. This approach ensures a structured resource that makes requirements explicit and guides all stakeholders throughout the translation project. Properly structured translation project specifications also enable accurate and fair evaluation of the translation output, either during the translation process or as part of the post-production stage.

6.2 Preparing the source language content

The requester should identify and prepare the source language content. Relevant translation project parameters to consider include the origin and complexity of the source language content, reference material and, where appropriate, content pre-processing, which is one of the process parameters. See Table B.2 and Table B.3 for examples of guiding questions and resulting translation project specifications.

When the source language content is to be translated into multiple languages or in different file formats, the translation project specifications should, when appropriate, be tailored for each language combination or file format.

6.3 Finalizing the translation project specifications

The requester and the TSP should continue developing the translation project specifications to cover all relevant translation project parameters that were not defined during the initial needs analysis (see 5.2), risk assessment (see 5.3) and the identification of the source language content (see 6.2). Whether they use all or a subset of the translation project parameters in Annex B depends on the nature of the translation project, the relationship between the parties, and their preferences.

The selected translation project parameters should make it possible to describe the desired characteristics of the translation output with a sufficient level of detail. The translation project parameters relevant for describing translation output requirements include content parameters such as terminology, content correspondence, style, language register, target language conventions and format. See Table B.2 for examples of guiding questions and resulting translation project specifications.

The TSP and client should agree on the service level based on the translation project specifications identified during the preceding steps, including the requirements regarding correspondence between the source and target language content and the fluency of the target language content. The requirements related to service level should cover process parameters such as technologies, pre-processing, translation, in-process quality checks, additional tasks and other remaining project parameters (see Table B.3 for a list of process parameters and Table B.4 for a list of other project parameters). The agreed service level should provide assurance that the risks identified during the risk assessment (see 5.3) will be mitigated to the agreed risk tolerance level.

In conclusion, the requester is responsible for providing the TSP with all necessary information so that the TSP can create the translation project specifications and provide guidance on the most suitable service level for the specific content type, use case and the translation output requirements.

Translation project specifications can be general (valid for more than one translation project) or project-specific (valid for one specific translation project). They are relevant during all stages of a translation project. They can be developed and used both within and outside commercial relationships. Once developed, the translation project specifications can be reused, partly or entirely, for repetitive or similar projects.

Annex C gives an overview of the steps for developing translation project specifications and the translation project parameters that are relevant for each step.

6.4 Documenting the translation project specifications

Once the translation project specifications have been agreed upon, the requester and the TSP should document the agreed form of cooperation and its scope to ensure cost transparency and clarify mutual expectations. This agreement should also set an objective basis for monitoring the workflow and measuring the degree to which the translation service adheres to the translation project specifications. The documentation can be in the form of a framework agreement, a service level agreement or a price list. It can also be in the form of quotations in writing ahead of every project, containing information determining all relevant aspects of the expected service.

NOTE In some cases, no legal contract is required at any point (e.g. an in-house translation department fulfilling a request from another department in the same organization).

7 Execution (production) stage

7.1 General

Translation projects vary in size, complexity and purpose, depending on the requirements. The translation project specifications agreed upon at the planning stage should determine not only the type of translation service, but also the selection of the resources, the technology, and the workflow necessary to execute the translation project.

This clause describes technologies, terminology work and the main activities during the execution stage of translation projects. It aims to provide requesters with a basic understanding so that they can form an opinion on possible choices for the translation project and discuss these matters with the TSP in an informed way.

7.2 Technologies

The translation project should make use of the most suitable technologies according to the translation project specifications. For example, the following categories of technologies can be relevant for a translation project:

— content creation and content management technologies;

— project management technologies, such as translation management systems;

— terminology management software;

— collaboration and communication tools;

— translation technologies.

The two most widely used translation technologies, often combined for maximum efficiency, are:

— translation memory systems, which retrieve previously translated content that matches the source language content and enable its re-use;

— machine translation systems, which use software to automatically translate content from one language to another.

Language professionals involved in translation projects work with increasingly sophisticated software applications designed to support human translation. Computer-aided translation (CAT) tools combine different resources and functions, such as translation memories, machine translation output, termbases and glossaries, automatic checks, advanced search and navigation options and progress reports.

Other technologies that can be used in translation projects include:

— localization software;

— software for automatic quality checks;

— desktop publishing software;

— text editors;

— voice recognition software;

— subtitling software;

— text analysis software.

All those who perform activities in the translation project should have appropriate knowledge of the technology in use.

7.3 Terminology work

Terminology is often one of the most important aspects of translation projects. It is of particular importance in domain-specific texts such as technical, legal, medical and politically sensitive texts. It is also an element that plays a role in risk assessment and in deciding on appropriate quality checks (e.g. the need for an expert review).

Annex F provides more information about how terminology relates to different stages of a translation project. For more information on terminology work, see ISO 704 and ISO 12616-1.

7.4 Pre-processing

The pre-processing begins with the examination of different aspects of the translation project specifications. Pre-processing activities can include:

— allocation of tasks and setting of corresponding deadlines;

— conversion of source files into translatable format;

— term extraction from the source language content;

— examination of the source language content for references, internal repetitions and inconsistencies;

— pre-editing of the source language content to facilitate translation (especially when source language content is to be translated into more than one target language, or to improve machine translation output);

— preparing and/or revising a translation memory;

— retrieving previously translated content from repositories;

— running pre-translation commands in a translation memory environment (e.g. inserting exact matches and machine translation output into the target language content according to previously defined thresholds).

At the end of the pre-processing, the content is ready for translation.

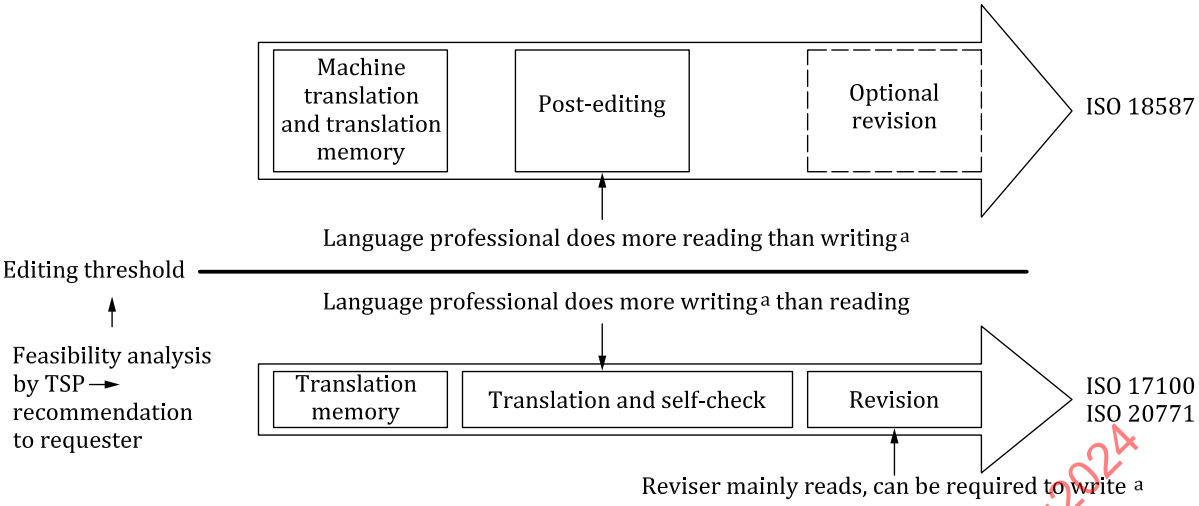
If the translation project foresees the delivery of machine translation output without any human intervention (see Annex A for use cases), pre-processing by running machine translation is directly followed by the verification and delivery (see 7.7).

7.5 Translation

How the translation activity is carried out varies depending on the level of pre-processing, the tools and software used during translation, and the translation project specifications. During translation, source language content is rendered into target language content through translation or post-editing, or a combination of both. The choice of process depends on various factors such as the purpose, the risks, the characteristics of the content (e.g. intertextuality, controlled language, term density), the availability and quality of previously translated similar content, and the quality of the available machine translation systems for the language combinations and domains concerned.

Translators and post-editors render the source language content into the target language in accordance with the translation project specifications.

The source language content can be pre-translated based on previously translated content from translation memories and machine translation output, or it can be translated interactively using such content. In both cases, the level of intervention of the language professional (i.e. translation or editing effort) depends on the translation project specifications and the quality of the resources. Figure 2 puts the editing effort in the context of translation standards.



[a] Writing can occur both as translating and as editing in translation/self-check, post-editing and revision.

NOTE Based on Reference [16].

Figure 2 — Editing threshold

7.6 In-process quality checks

A TSP should perform checks before delivery to ensure that the translation output is of the required quality. Such checks can include revision, review, proofreading or even back translation (e.g. in medical translation). The checks can also be targeted at a specific aspect of the target language content, such as spelling, terminological consistency, completeness and can be performed with the help of tools. Because each project is different, it can be justified to perform all, some or none of these checks. Which in-process quality checks are required for a given project should be determined based on the risk assessment. The most common in-process quality checks are defined in ISO 17100 and listed here for reference with an indication of when they can be used.

— Revision is required for translation services conforming to ISO 17100 and ISO 20771. A competent reviser checks the target language content against the source language content to ensure that the target language content is suitable for its purpose (for more information, see ISO 17100:2015, 5.3.3, or ISO 20771:2020, Clause 5). Revision is recommended for translation output involving high risks.

— Review focuses on checking the target language content for domain accuracy. It is recommended for content in specialized domains (see ISO 17100:2015, 5.3.4).

— Proofreading is useful for content that will be published (see ISO 17100:2015, 5.3.5).

Information on applicable checks should be included in the translation project specifications under the parameter "in-process quality checks". The responsibility for in-process quality checks can fall upon either the requester or the TSP. It is important to specify the responsibility in the translation project specifications.

NOTE Neither the translator's check of their own translation nor editing of machine translation output can be considered as in-process quality checks because they do not involve a second pair of eyes. The translator's check or self-revision is part of translation.

7.7 Verification and delivery

Once the translation and relevant in-process quality checks are completed, further post-processing can still be needed and can involve the following activities:

— generating a file in requested format (e.g. .pdf, .srt);

— reassembling the content if the translation task was split between several translators;

— checking that the translation output complies with formatting requirements (e.g. formatting, embedded objects, layout);

— saving the translation output in agreed locations;

— uploading the content into specific databases for later use.

After all project activities have been completed, the project manager should verify the translation project against the translation project specifications. If this verification indicates any shortcomings, the project manager should ensure that the relevant actors make necessary corrections. Once the verification is complete, the project manager should deliver the translation output and other deliverables to the requester as determined by the translation project specifications.

8 Closing (post-production) stage

8.1 General

The closing stage takes place after the TSP has completed the translation project and delivered all required deliverables to the requester. The activities described in 8.3 and 8.4 can be performed as a standard procedure or as needed.

8.2 Closure of the project

The TSP and the requester should archive all relevant documents and other files exactly as exchanged in order to document and keep track of the work performed in such a way that, when appropriate and permissible, it is possible to easily locate, consult or re-use the project content.

NOTE In some jurisdictions, file retention time is governed by legislation or other standards.

8.3 Feedback

8.3.1 General

To foster continuous improvement, requesters and TSPs should discuss their level of satisfaction with both the process and the outcome. Systematic feedback, including complaints, helps to improve both output and service quality and, if handled correctly, strengthens the relationship between the requester and the TSP, and between the TSP and any subcontractors. Feedback can be gathered in a variety of ways, including evaluation of translation output (see 8.4) or satisfaction surveys.

8.3.2 Feedback from requesters

When communicating feedback or results of the evaluation of translation output, requesters should always give concrete examples so that the TSP can examine any issues quickly and usefully. The same applies when TSPs give feedback to language professionals or reviewers.

End-user feedback and results of the evaluation of translation output (both negative and positive) can help requesters and TSPs evaluate both the translation project specifications and the TSPs' adherence to them, or, for example, whether the linguistic and domain competence of language professionals and reviewers, and the chosen work organization, were suitable for the translation project.

Feedback received by requesters on translation output should be shared with the TSP, including all language professionals involved in the translation project. Both sides should incorporate it into the translation project specifications for future projects, e.g. by updating termbases, style guides or knowledge bases.

8.3.3 Feedback within and from the TSP

TSPs should consider feedback from anyone involved in the translation project, including translators, post-editors, reviewers, revisers and project managers. The TSP should have a process in place to improve future projects based on relevant feedback. Positive feedback should be shared in the same way as negative feedback. Positive feedback can indicate that instructions and translation project specifications were appropriate, comprehensible and communicated well. The TSP should record both positive and negative feedback to identify trends for appropriate action to be taken.

Giving feedback to requesters is also important and can improve collaboration. Requesters can often avert the need for reworking translation output by making minor adjustments either to the way they produce source language content or to the translation project specifications, or to the way they communicate with the TSP.

8.4 Evaluation of translation output

The requester or TSP can choose to conduct a post-delivery inspection in the form of an evaluation of the translation output. Those who conduct this inspection should refer to the translation project specifications and use them as the basis for their evaluation, ensuring that all evaluative comments, queries, and changes are justified by the translation project specifications (see 6.2, ISO 17100:2015, 5.3.1, and ISO 5060). Such comments, queries and changes should be shared with the actors involved in the translation project (e.g. translators, revisers, post-editors).

This information can be valuable to the TSP because it can help the TSP improve future translation work. It can also be considered in discussions on future translation project specifications.

See ISO 5060 for guidance on evaluating translation output.

9 Transversal activities

9.1 Risk management and contingency planning

Risk management includes all measures for the systematic identification, analysis, evaluation, control, and treatment of risks. Contingency planning for major disruptions includes developing a framework for responding efficiently to unforeseen situations or incidents.

Apart from the risks of not conforming to the requirements laid down in the translation project specifications, risks in translation project management can relate to the following:

— operational risks (e.g. sudden failure, loss, malfunction or misalignment of human and technical resources; poor communication between those involved in the project);

— financial risks (e.g. unplanned costs due to increased workload, changes in workflow, penalties for failure to meet deadlines or specifications);

— risks arising from non-compliance with legal conditions (e.g. failure to provide appropriate and intelligible technical documentation for machinery or other equipment);

— risks attributable to incorrect decisions, including those due to a lack of information (e.g. in a due diligence process).

The project manager should be able to identify risks, their nature, causes and effects early in the process and to counteract or mitigate them. Ideally, the project manager should have a checklist of potential risks and a risk management plan for each potential risk and should take the checklist and the risk management plan into account during project planning.

Risk management aims to prevent damage that can occur to the requester, TSP or end user of the translation output. Deviations from the client–TSP agreement and established or usual work processes should be

analysed, and immediate measures for possible control should be taken. Specific risk management measures include:

— planning for unforeseen events;

— scheduling additional time for possible corrective actions;

— ensuring additional human resources for emergencies;

— having clear documentation at hand as regards risk ownership.

9.2 Project communication

9.2.1 General principles

Communication shapes a common understanding of how to achieve quality throughout the workflow by providing definitions, instructions and rules and responding to queries. It is therefore essential for achieving successful cooperation.

Project managers should have strong organizational and communication skills and take charge of ensuring smooth communication and information flows among everyone involved in the translation project.

All project communication should be clear and precise, especially instructions and queries. Clear communication supports adherence to translation project specifications and enables checking of the levels of response to queries.

Communication can occur in person (e.g. face-to-face meetings) or through phone calls, web meetings, designated platforms or email. In the case of non-written communication, all major decisions and translation project specifications should be documented and shared with all relevant stakeholders.

9.2.2 Query management

The requester and the TSP should agree on how queries will be managed. This includes, for example, information on contact persons, communication channels, handling of unanswered queries, how various actors should be informed of the replies, and the deadlines for the replies.

Requesters should always designate contact persons to ensure the communication with the TSPs. Designated contact persons can vary depending on the type of query (e.g. terminology, deadline, technical question) or on the translation project itself, but the project manager should always know whom to address.

Translator queries and requester replies should be used to create or update style guides, termbases or knowledge bases to prevent the same questions from being repeated.

Annex A
(informative)

Using unedited machine translation (UEMT) output

A.1 General

If the requester considers, based on the initial needs analysis and risk assessment, that their needs can be met using available machine translation platforms, they should be aware that they assume the risks related to the unpredictable quality of such translation. The decision to use UEMT output should only be taken based on the consideration of some relevant questions, such as the following.

— Is the source language content suitable for UEMT?

— Which machine translation platform is the best for the project in question?

— Are there adequate resources in the language pair for machine translation?

— Is the risk of unpredictable translation errors acceptable?

— How can the quality of the end result be ascertained?

— Who is responsible if problems occur? Does strict liability or fault-based liability apply?

— Does the machine translation platform provide the required data protection and cyber security level?

If the requester needs help answering these questions, they should turn to a TSP. A TSP can give advice, assess the source language content for suitability for machine translation, evaluate the quality of machine translation platforms and their output, and translate the source language content using the most appropriate machine translation platform, in cases where this is the desired course of action.

A.2 Types of machine translation

Based on the technology behind them, machine translation systems are classified as rule-based, statistical, neural or hybrid systems. Depending on the type of text corpora with which they are trained, they are further classified as generic or customized systems (i.e. fine-tuned with domain-specific terminology or training data). The quality of such systems depends greatly on the size and the quality of the corpora as well as on their suitability for the source language content to be machine translated.

It is beyond the scope of this document to go in depth into the various approaches to machine translation, except to point out that the data-driven approach is based on sophisticated computational methods used to process the frequency of word usage in the training corpus. This kind of frequency analysis enables the automated identifications of traces of semantics present in the results of prior human activity, but without processing the meaning. Processing the meaning is the key component of the contribution of the human language professional.

Machine translation technology is evolving rapidly. At present, many machine translation service providers offer cloud-based and inexpensive or free generic machine translation services, which have contributed to make machine translation ubiquitous. It is impossible to predict its evolution in the long term. This annex examines only some considerations about the use of machine translation, regardless of the approach used in its design.

A.3 Confidentiality

Some machine translation systems (especially free online platforms) incorporate source language content and UEMT output, as well as any corrections made to the machine translation output, into a database that is later referenced to produce subsequent translations by other parties. This practice can constitute a violation of confidentiality restrictions in the translation project specifications, which would thus preclude the use of such machine translation systems. If such restrictions apply, it is highly recommended to check the terms of service of such platforms before use, to make sure they are not reusing any of the content (either the source or the target language content).

A.4 Typical use cases

One typical use case for UEMT is when the only alternative to UEMT is no translation at all, as it can be better to have the UEMT output, even though it is neither accurate nor fluent. One example of such a use case is instant messaging and texting. People sometimes employ humans to interpret in real time for telephone conversations in which the interlocutors do not speak the same language. However, people rarely employ translators to translate instant messages or text messages in real time.

Another compelling case involves the application of UEMT output to determine which source language content among a high volume of material is most relevant to the organizations' needs and thus should be processed by a human translator. This use case is known as "machine translation for triage" and one of the examples of such use is e-discovery, where machine translation can be combined with other machine learning tools.

NOTE More information on the process of e-discovery can be found in Reference [18].

However, UEMT output should not be used when misunderstandings based on inaccurate translation can have unacceptable negative consequences.

UEMT output should always be labelled as such and the users should be made aware of the risk of possible mistranslations and misunderstandings, e.g. by adding a corresponding note or disclaimer.

A.5 Quality aspects

One advantage of the neural machine translation systems is that the machine translation output is of better quality compared to other machine translation system architectures. This applies in particular to fluency, which means that neural machine translation is more well-formed and is generally perceived as being closer to natural language created by a native speaker. However, neural machine translation is not reliable with regard to the correspondence between source and target language content: some of the most common errors are omissions, additions, repetitions, inconsistencies and, most importantly, mistranslations (invented words, or wrong words which can completely change or invert the meaning). This means that fluent output can be deceptive and the decision to use UEMT output should take this unreliability into account.

A.6 Summary

UEMT output should be neither accepted as universally appropriate nor rejected as universally inappropriate. It is an option for some use cases, depending on the translation project specifications. The decision to use UEMT output should always be taken based on needs analysis and risk assessment.

Annex B
(informative)

Translation project parameters

B.1 General

This annex lists the translation project parameters that describe the characteristics of the translation project and serve as the basis for the creation of translation project specifications. An overview of the complete set of translation project parameters is presented in Table B.1.

Table B.1 — Overview of translation project parameters

1. Content parameters	2. Process parameters	3. Other project parameters
1.1 Language and locale	2.1 Technology	3.1 Risks
1.2 Type of content	2.2 Pre-processing	3.2 Reference material
1.3 Target audience	2.3 Translation	3.3 Workplace requirements
1.4 Purpose	2.4 In-process quality checks	3.4 Permissions
1.5 Domain	2.5 Additional tasks	3.5 Qualifications
1.6 Terminology		3.6 Security
1.7 Content correspondence		3.7 Confidentiality
1.8 Style		3.8 Delivery
1.9 Language register		3.9 Compensation
1.10 Target language conventions		3.10 Communication
1.11 Format		
1.12 Volume		
1.13 Complexity		
1.14 Origin		

B.2 Content parameters

Content parameters relate to source language content and target language content. Table B.2 gives some examples of guiding questions and the resulting translation project specifications.

Table B.2 — Content parameters

Translation project parameter	Guiding questions	Translation project specifications
1.1 Language and locale[a]	What language is the source content written in? Is it a language variant of a specific country? What language or languages and locales should the source language content be translated into?	EXAMPLE 1 Brazilian Portuguese (language code pt-BR). EXAMPLE 2 UK English (language code en-GB). NOTE See ISO 639 for the language codes.
1.2 Type of content	What type of content is it? What are the main characteristics of the content?	EXAMPLE 1 Contract. EXAMPLE 2 Marketing brochure. EXAMPLE 3 Speech. EXAMPLE 4 User manual of an appliance. EXAMPLE 5 Product catalogue.
1.3 Target audience[a]	For whom has the source language content been created? Whom is the translation for? Who will read or use the translation output?	EXAMPLE 1 Patent officials. EXAMPLE 2 Technicians. EXAMPLE 3 Employees of a specific company.
1.4 Purpose[a]	Why was the source language content created? Why is the translation output needed? How or for what will it be used?	EXAMPLE 1 For use in court. EXAMPLE 2 Marketing of a product. EXAMPLE 3 Information for personal use.
1.5 Domain	What is the topic of the source content? What is the subject field/domain of the source content?	EXAMPLE 1 Chemical engineering. EXAMPLE 2 Civil engineering. EXAMPLE 3 Economics. EXAMPLE 4 Family psychology.
1.6 Terminology[a]	Does the source language content contain terms that need to be translated in a particular way? Should the target language terminology conform to specific client or domain terminology and other reference material? Is terminological consistency important?	EXAMPLE 1 Terms identified by requester need to be translated in a particular way. EXAMPLE 2 Source language content uses terminology that is not in line with the termbase.
1.7 Content correspondence	Should the target language content read like it was authored in the target language? Should the target language content include the aspects of the source language culture?	EXAMPLE 1 Target language content is fully localized for the target audience and reads as if authored in target language. EXAMPLE 2 Translation of a letter retains aspects of the source language culture.
1.8 Style	Should the target language content conform to specific style requirements? Is there a specific style guide that needs to be followed? NOTE An organization's style guide ensures consistency within a document and between multiple documents. It can include guidelines on language usage, composition, orthography, grammar, layout (formatting, margins, font point size, etc.), and a reference to existing termbases.	EXAMPLE 1 Compliance with a general organizational style guide. EXAMPLE 2 Use of space as the thousands separator. EXAMPLE 3 Avoiding direct speech. EXAMPLE 4 Company name should be written in capital letters. EXAMPLE 5 Use of "shall" to express requirements.
1.9 Language register	Should the target language content conform to specific requirements with regard to language register?	EXAMPLE 1 Formal academic presentation. EXAMPLE 2 A leaflet for teenagers.
1.10 Target language conventions	Is it important that the target language content conforms to target language conventions with regard to syntax, spelling, punctuation, diacritical marks and other orthographical conventions? How important are lexical cohesion and correct phraseology?	NOTE For a use case such as conveying the basic or general idea of the text, target language conventions are not as important as for a contract.

[a] The values for these content parameters can differ for source language content and target language content.

Table B.2 *(continued)*

Translation project parameter	Guiding questions	Translation project specifications
1.11 Format[a]	Should the target language content conform to certain formatting or mark-up requirements? How or where is the translated text going to appear? What is the delivery format of the translation output?	EXAMPLE 1 It is required to use the font Arial, size 11 and spacing 1.5. EXAMPLE 2 The translated text is to appear in an infographic, or in subtitles. EXAMPLE 3 The required delivery format of the translation output is the native file format as well as PDF.
1.12 Volume	How large is the content volume to be translated? Is it a one-off request or part of a continuous localization process? NOTE Volume is the most commonly used parameter for cost calculation. It refers to either source or target language content and can be calculated on the basis of characters, words, lines or pages either by software applications or by a visual or manual count.	EXAMPLE 1 A one-off request of 2 500 words. EXAMPLE 2 1 000 words per week.
1.13 Complexity	Does the content have additional complexity that needs to be considered? Does the content have embedded graphics or media? Does the content need conversion into translatable format?	EXAMPLE 1 Source language content has embedded graphics that are not editable and the translation output needs to be provided in a separate file. EXAMPLE 2 Source language content is a copy of handwritten text and needs to be transcribed before it can be translated.
1.14 Origin	Was the content originally written in the source language? Is the content a modification of a previous version? Have previous versions been translated?	EXAMPLE 1 A translation from French to English has been requested and the content was originally authored in Japanese. EXAMPLE 2 A previously translated version of the text can be used.

[a] The values for these content parameters can differ for source language content and target language content.

B.3 Process parameters

Table B.3 gives some examples of guiding questions and the resulting translation project specifications for the process parameters.

Table B.3 — Process parameters

Translation project parameter	Guiding questions	Translation project specifications
2.1 Technology	Is there a specific software or technology to be used? Is there a preferred computer-assisted translation (CAT) tool to be used? Is there a specific tool to manage terminology? NOTE Technology can be specified by the requester or selected by the TSP (see 7.2).	EXAMPLE CAT tool specified by the requester.
2.2 Pre-processing	Are there any tasks that need to be completed before the translation task can be started?	EXAMPLE Identifying terms in the source language content and deciding on corresponding target language terms to be used.
2.3 Translation	How will the translation be done? Will machine translation be used and how?	EXAMPLE 1 Translation using translation memories. EXAMPLE 2 Full post-editing of machine translation output.
2.4 In-process quality check	Which in-process quality checks will be applied? Who will be responsible for carrying out the in-process quality checks?	EXAMPLE 1 Revision. EXAMPLE 2 Review by the requester. EXAMPLE 3 Proofreading.
2.5 Additional tasks	Are any additional tasks required? Who will be responsible for the additional tasks?	EXAMPLE 1 Functional testing for software. EXAMPLE 2 Expert review. EXAMPLE 3 Conversion of files.

B.4 Other project parameters

Table B.4 gives some examples of guiding questions and the resulting translation project specifications for other project parameters.

Table B.4 — Other project parameters

Translation project parameter	Guiding questions	Translation project specifications
3.1 Risks	What are the risks related to the translation output and its use? What potential consequences would translation errors have for the stakeholders? How likely is it that the different risks would materialize if there are translation errors? Which of the identified risks are important for the requester (ranking)? To what extent should the risks be mitigated? What are the worst consequences the requester is prepared to accept?	EXAMPLE 1 Risks: Risk of miscommunication, reputational risk, financial risk, risk of data loss or data breach, legal risk, risk of property damage, risk of injury or death. EXAMPLE 2 Consequences: Impaired communication, reputational damage, loss of clients, missed business opportunities, property damages, data breach, litigation, financial penalties, injuries, death.
3.2 Reference material	Are there any translation memories that will be provided and need to be used? Are there any similar texts or previous translation output that can be provided? How will the reference materials be provided? In the case of several reference documents, it should be indicated which reference material takes precedence.	EXAMPLE 1 Related documents from the requester (both in the source and target languages). EXAMPLE 2 Translation memories. EXAMPLE 3 Software texts in the target language that need to be cited in the software manual. EXAMPLE 4 PDF version of a file produced with graphic design software so that the content can be viewed in layout and context. EXAMPLE 5 Transcreation brief.
3.3 Workplace requirements	Is there a requirement that the translation project needs to be done at a specific location?	EXAMPLE Work should be carried out in a secure environment.
3.4 Permissions	Who holds the copyright for the target language content, translation memories and other deliverables? Will the translator's name or TSP company name appear on the published translation output? Are there any restrictions regarding the use and ownership of translation memories derived from the project and terminology products associated with the project?	EXAMPLE Copyright for the translation memories belongs to the client.
3.5 Qualifications	What are the minimum qualifications (e.g. academic credentials, certification) for the translation project team members?	EXAMPLE 1 Inclusion on a government-managed list of approved vendors. EXAMPLE 2 Certification against a particular standard or by a particular organization. EXAMPLE 3 Certification as a sworn translator. EXAMPLE 4 Degree in engineering to act as a reviewer.
3.6 Security	What are the security requirements? Is the use of online translation resources (e.g. public machine translation) allowed?	EXAMPLE 1 Data encryption when sending translation output via email. EXAMPLE 2 Servers are not hosted externally. EXAMPLE 3 The use of public machine translation platforms is not allowed.
3.7 Confidentiality	Are there any confidentiality requirements for the source language or target language content? Are there any obligations related to the deletion of data after the project is completed?	EXAMPLE 1 Critical content that is treated confidentially. EXAMPLE 2 All data are deleted upon the completion of the project.

Table B.4 *(continued)*

Translation project parameter	Guiding questions	Translation project specifications
3.8 Delivery	How will the translation output be delivered? What are the deliverables of the project? What are the deadlines for the deliverables?	EXAMPLE 1 Delivery method: email, SFTP (secure file transfer protocol), web interface. EXAMPLE 2 Deliverables: an updated translation memory, terminology products, a style guide created by the TSP. EXAMPLE 3 Delivery date: in continuous localization, instead of a deadline (delivery date), fixed turn-around times or throughput.
3.9 Compensation	How will the compensation be calculated? What are the invoicing and payment procedures?	EXAMPLE 1 Price per word method used for estimating cost. EXAMPLE 2 TSP fee with any discounts or surcharges applied. EXAMPLE 3 Payment terms and method.
3.10 Communication	Who are the points of contact for queries? What is the preferred method of communication? How will feedback be provided to the TSP?	EXAMPLE 1 Procedure for asking and answering questions. EXAMPLE 2 A contact person to answer the TSP's queries. EXAMPLE 3 A timeline for query resolution.

Annex C
(informative)

Checklist for developing translation project specifications

Table C.1 summarizes the steps in developing the translation project specifications and the translation project parameters that are relevant for each step. Following these steps in the recommended order ensures that all translation project parameters are considered. Each step builds on the previous one.

The requester's experience as a translation service buyer will determine to what extent they can carry out these steps on their own and where they need to involve a TSP.

Table C.1 — Overview of steps in developing translation project specifications

Clause	Step	Relevant translation project parameters	Check
5.2	Initial needs analysis that consists of defining the content type and describing the use case.	Content parameters: — type of content; — domain; — languages and locales; — target audience; — purpose. Other project parameters: — volume; — delivery (deadline).	
5.3	Risk assessment that involves identifying the risks related to the translation output and its use, analysing, and evaluating the risks, and deciding the risk tolerance level.	Other project parameter: — risks.	
6.2	Source language content preparation	Content parameters: — complexity; — origin. Process parameter: — pre-processing. Other project parameter: — reference material.	
6.3	Defining the translation output requirements	Content parameters: — terminology; — content correspondence; — style; — language register; — target language conventions; — format.	
6.3	Defining the service level	Process parameters:	

Table C.1 *(continued)*

Clause	Step	Relevant translation project parameters	Check
		— technology; — pre-processing; — translation; — in-process quality checks; — additional tasks. Other project parameters: — workplace requirements; — permissions; — qualifications; — security; — confidentiality; — delivery; — compensation; — communication.	