International Standard

ES 2501

Terminology management — Principles and methods

First edition
2025-05

Reference number
ES 2501:2025(en)

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Published in Switzerland

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Foreword

The Enosema Foundation (“ES”) is the premier non-profit standardization organization for terminology standardization and terminology related processes such as management. It facilitates the education, standardization, research, promotion, definition, and usage of terminology resources and management practices globally.

ES works with international partners and experts across the globe, reflecting the international nature of its mission. More information about ES is available on the official website (https://www.enosema.org).

The procedures used to develop this document and those intended for its further maintenance are described in the ES Directives.

In particular, the different approval criteria needed for the different types of ES documents should be noted. This document was drafted in accordance with the editorial rules of the ES Directives.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ES shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be provided in the Introduction.

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

This document was prepared by Technical Committee *Terminology*.

Introduction

Terminology, the collection of terms and their definitions within a specific domain, forms the foundation of effective communication in specialized fields. Terminology management refers to the systematic handling of terminology, including the creation, collection, recording, processing, and dissemination of terminological information across organizations and domains.

In our increasingly globalized and specialized world, the consistent use of terminology has become essential for clear communication, accurate knowledge transfer, and effective content management. Poorly managed terminology leads to misunderstandings, inconsistencies in documentation, increased translation costs, and potential safety and compliance issues in regulated industries.

Several international standards provide the foundation for terminology work, including ISO 704 (Terminology work — Principles and methods), which establishes the basic principles and methods for terminology work; ISO 30042 (Management of terminology resources — TermBase eXchange (TBX)), which specifies a framework for representing terminological data; and ISO 10241-1 and ISO 10241-2, which provide guidelines for terminological entries in standards and the adoption of standardized terminological entries.

Despite the existence of these standards, organizations often struggle with implementing effective terminology management practices due to a lack of practical guidance, organizational commitment, and understanding of the principles and methods involved. Inconsistent terminology usage continues to be a significant challenge across industries, leading to confusion, inefficiencies, and increased costs.

This document addresses this gap by providing comprehensive guidelines for terminology management based on established international standards and best practices. It outlines the core principles, consistency approaches, requirements, and presentation rules necessary for effective terminology management.

The guidelines presented in this document are designed to help organizations:

— Establish consistent terminology across all content and communications

— Implement efficient terminology management processes

— Build and maintain terminology resources that meet international standards

— Improve the clarity and quality of content

— Reduce translation and localization costs

— Facilitate knowledge transfer and communication across boundaries

By following these guidelines, organizations can improve the clarity and consistency of their communications, enhance their content quality, reduce costs, and better serve their global audiences.

This standard builds upon the significant contributions of terminology experts worldwide and the foundational work established in ISO standards. The Enosema Foundation recognizes the critical importance of terminology management in today's knowledge-based economy and is committed to advancing terminology standardization and related processes.

Terminology management — Principles and methods

1 Scope

This document specifies principles, methods, and best practices for terminology management across organizations and domains. It provides a standardized approach to the creation, collection, storage, processing, and dissemination of terminology resources.

The guidelines specified in this document apply to all terminology management activities, regardless of the subject field, industry, or organization size. The standardized approaches enhance terminology consistency, improve communication clarity, and ensure compliance with international terminology standards.

This document provides practical guidance for implementing effective terminology management processes based on established international standards, including ISO 704, ISO 30042, ISO 10241-1, and ISO 10241-2, with examples illustrating the application of these principles in various contexts.

This document is intended for:

— Terminology managers and terminologists responsible for developing and maintaining terminology resources

— Content creators, technical writers, and documentation specialists who need to apply consistent terminology

— Translators and localizers who work with specialized terminology across languages

— Standards developers who need to ensure terminological consistency in their documents

— Subject matter experts contributing to terminology resources

— Managers and decision-makers responsible for content quality and strategy

The guidelines specified here complement the principles and methods described in ISO 704, the data exchange formats defined in ISO 30042, and the rules for terminological entries established in ISO 10241-1 and ISO 10241-2.

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 704:2022, *Terminology work — Principles and methods*

ISO 10241-1:2011, *Terminological entries in standards — Part 1: General requirements and examples of presentation*

ISO 10241-2:2012, *Terminological entries in standards — Part 2: Adoption of standardized terminological entries*

ISO 30042:2019, *Management of terminology resources — TermBase eXchange (TBX)*

3 Terms and definitions

For the purposes of this document, the following terms and definitions 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
terminology
set of designations belonging to one special language

[SOURCE: ISO 704:2022]

3.2
term
verbal designation of a general concept in a specific subject field

[SOURCE: ISO 704:2022]

3.3
terminology management
management of terminology resources through the systematic collection, description, processing, and presentation of concepts and their designations

[SOURCE: ISO 30042:2019]

3.4
terminology database
database containing terminology data

[SOURCE: ISO 30042:2019]

3.5
concept
unit of knowledge created by a unique combination of characteristics

[SOURCE: ISO 704:2022]

3.6
terminological data
data related to concepts or their designations

[SOURCE: ISO 30042:2019]

3.7
designation
representation of a concept by a sign which denotes it

Note 1 to entry: In terminology work, three types of designations are distinguished: symbols, appellations and terms.

[SOURCE: ISO 704:2022]

3.8
definition
representation of a concept by a descriptive statement which serves to differentiate it from related concepts

[SOURCE: ISO 704:2022]

3.9
terminological entry
part of a terminological data collection which contains the terminological data related to one concept

[SOURCE: ISO 10241-1:2011]

3.10
subject field
field of special knowledge

[SOURCE: ISO 704:2022]

3.11
concept harmonization
activity leading to the establishment of a correspondence between two or more closely related or overlapping concepts in order to eliminate or reduce minor differences between them

[SOURCE: ISO 704:2022]

3.12
concept system
set of concepts structured according to the relations among them

[SOURCE: ISO 704:2022]

3.13
term extraction
process of identifying and collecting term candidates from a corpus by manual, automatic, or semi-automatic means

3.14
terminology workflow
series of coordinated terminology activities

3.15
terminology resource
structured collection of terminological data

4 Principles of terminology management

4.1 General

Effective terminology management is founded on a set of core principles derived from international standards and best practices. These principles ensure that terminology work is systematic, consistent, and of high quality, serving the needs of all stakeholders.

The principles outlined in this section build upon the fundamental principles of terminology work established in ISO 704:2022 and provide a comprehensive framework for terminology management activities across organizations and domains.

4.2 Concept-based approach

Terminology management shall be based on concepts rather than terms. A concept is a unit of knowledge created by a unique combination of characteristics.

This principle dictates that:

a) Concepts should be clearly defined before terms are assigned

b) Each concept should be placed within its appropriate concept system

c) Relationships between concepts should be explicitly documented

d) One concept should correspond to one terminological entry

EXAMPLE Instead of creating separate entries for similar terms such as “backup,” “back-up,” and “back up,” a concept-based approach would create a single entry for the concept, documenting these terms as synonyms or variants.

4.3 Clarity and precision

Definitions and terms shall be clear, precise, and unambiguous within their subject field.

This principle requires:

a) Definitions that clearly distinguish a concept from related concepts

b) Terms that accurately represent the concept they designate

c) Avoidance of ambiguity and vagueness in both definitions and terms

d) Appropriate use of defining characteristics based on the concept type

EXAMPLE Poor definition: “database — a collection of data” Better definition: “database — structured collection of data that is stored on a computer system and can be accessed, managed, and updated in various ways”

4.4 Subject field orientation

Terminology shall be developed and managed within the context of its subject field.

This principle emphasizes:

a) Organizing terminology within clearly defined subject fields

b) Understanding and respecting the conceptual structures of each field

c) Using field-specific classification systems where appropriate

d) Involving subject matter experts in terminology development

4.5 Documentation of sources

All terminological data shall be properly documented with reliable sources.

This principle requires:

a) Citing authoritative sources for definitions, contexts, and other data

b) Documenting the origin and evolution of terms

c) Maintaining bibliographic information for all external sources

d) Indicating the reliability and relevance of sources

4.6 Systematic management

Terminology shall be managed systematically following established processes and workflows.

This principle involves:

a) Establishing clear procedures for terminology collection, creation, validation, and dissemination

b) Implementing appropriate technology solutions for terminology storage and retrieval

c) Defining roles and responsibilities for terminology management tasks

d) Regular review and updating of terminology resources

4.7 Appropriate level of granularity

The level of detail in terminological entries shall be appropriate for the intended use and users.

This principle means:

a) Determining the appropriate amount of information to include in entries based on user needs

b) Balancing comprehensiveness with usability

c) Providing sufficient context for proper understanding and application

d) Adapting the level of technical specificity to the target audience

4.8 Stakeholder involvement

Terminology management shall involve relevant stakeholders throughout the process.

This principle emphasizes:

a) Identifying and engaging key stakeholders (subject experts, translators, content creators, etc.)

b) Establishing collaborative processes for terminology development and review

c) Considering the needs and perspectives of different user groups

d) Creating feedback mechanisms for continuous improvement

4.9 Quality assurance

Terminology management shall include quality assurance measures at all stages.

This principle requires:

a) Establishing clear quality criteria for terminological data

b) Implementing validation and approval processes

c) Regular review and updating of terminology resources

d) Monitoring the application of terminology in content

4.10 Harmonization

Terminology shall be harmonized within and across subject fields when appropriate.

This principle involves:

a) Identifying and resolving inconsistencies in terminology use

b) Aligning terminology across related domains and disciplines

c) Reconciling differences in term usage across departments, companies, or regions

d) Balancing standardization with domain-specific needs

5 Terminology consistency

5.1 General

Terminology consistency refers to the uniform and coherent use of terminology across all content within an organization or specific domain. Consistency in terminology is essential for effective communication, clear documentation, efficient translation, and improved user experience.

This section outlines approaches and strategies for achieving and maintaining terminology consistency, in accordance with the principles described in ISO 704 and the requirements for terminological entries in ISO 10241-1.

5.2 Importance of terminology consistency

5.2.1 Improved communication clarity

Consistent terminology reduces ambiguity and confusion in communication. When the same concept is consistently represented by the same term, readers can focus on understanding the information rather than deciphering terminology.

5.2.2 Enhanced content quality

Content with consistent terminology appears more professional and authoritative. Inconsistent terminology can undermine reader confidence and diminish the perceived quality of the content.

5.2.3 Reduced translation costs and improved translation quality

Consistent source terminology significantly improves translation efficiency and quality. When terms are used consistently, translation memory systems can achieve higher match rates, reducing costs and increasing consistency across languages.

5.2.4 Improved searchability and information retrieval

Consistent terminology makes it easier to find and retrieve information in documentation, knowledge bases, and other content repositories. Users can search for specific terms with confidence that all relevant information will be found.

5.2.5 Legal and safety compliance

In regulated industries, consistent terminology is often a requirement for compliance. Inconsistent terminology in safety-critical documentation can lead to misunderstandings with potentially serious consequences.

5.3 Strategies for achieving terminology consistency

5.3.1 Establishing a single source of truth

Organizations shall establish an authoritative terminology resource that serves as the single source of truth for approved terminology. This resource may take the form of:

— A terminology database (termbase) following the TBX standard (ISO 30042:2019)

— A terminology management system

— A controlled vocabulary or glossary

All content creators and translators should have access to this resource and be required to use it as the authoritative reference.

5.3.2 Implementing terminology workflows

Organizations shall establish formal workflows for terminology management, including:

a) Term identification and extraction

b) Term research and definition

c) Term approval and validation

d) Term dissemination and implementation

e) Term maintenance and updating

EXAMPLE An effective terminology workflow:

— Content authors flag potential new terms during content creation

— Terminologists research the terms and propose definitions

— Subject matter experts validate the terms and definitions

— The approved terms are added to the terminology database

— Content authors are notified of new approved terms

— Translation teams are informed of terminology updates

5.3.3 Integration with content creation processes

Terminology consistency shall be integrated into the content creation process through:

a) Terminology validation during content authoring

b) Terminology checks in content review processes

c) Automated terminology verification tools

d) Style guides with clear terminology guidelines

5.3.4 Regular terminology audits

Organizations shall conduct regular terminology audits to:

a) Identify inconsistencies in terminology usage

b) Detect unauthorized terms or definitions

c) Evaluate compliance with terminology guidelines

d) Prioritize areas for terminology improvement

5.4 Measuring terminology consistency

5.4.1 Quantitative measures

Terminology consistency can be measured quantitatively through:

— Term compliance rate: percentage of terminology usage that complies with approved terminology

— Term coverage: percentage of concepts in a domain that have approved terms

— Term usage frequency: how often approved terms are used correctly compared to unapproved variants

5.4.2 Qualitative assessment

Qualitative assessment of terminology consistency may include:

— User feedback on terminology clarity and consistency

— Subject matter expert evaluation of terminology appropriateness

— Translator assessment of terminology translatability

— Content reviewer reports on terminology issues

5.5 Maintaining terminology consistency over time

5.5.1 Continuous improvement processes

Terminology consistency requires ongoing attention through:

a) Regular review and updating of terminology resources

b) Soliciting and incorporating user feedback

c) Monitoring term usage patterns

d) Adapting to evolving subject field knowledge

5.5.2 Change management for terminology

When terminology changes are necessary, organizations shall implement change management processes that include:

a) Documentation of the rationale for terminology changes

b) Communication of changes to all stakeholders

c) Version control of terminology resources

d) Guidance on transitioning to new terminology

e) Update of existing content to reflect terminology changes

5.5.3 Training and awareness

Organizations shall provide appropriate training and awareness programs to promote terminology consistency, including:

a) Introductory training on terminology principles and practices

b) Regular updates on terminology changes and additions

c) Guidance on using terminology tools and resources

d) Recognition of good terminology practices

6 Terminology requirements

6.1 General

Terminology requirements define the technical and procedural specifications for establishing and maintaining effective terminology resources. These requirements ensure that terminology resources meet quality standards, serve their intended purpose, and comply with relevant international standards.

The requirements outlined in this section are derived from established standards, including ISO 30042 for terminology data exchange and ISO 10241-1 for terminological entries in standards.

6.2 Data structure requirements

6.2.1 Terminological entry structure

Terminological entries shall include the following core components in accordance with ISO 10241-1:2011:

— Entry identifier

— Subject field

— Definition

— Term(s)

— Source information

Additional components may include:

— Grammatical information

— Context examples

— Notes

— Multimedia representations

— Cross-references to related concepts

— Administrative information

EXAMPLE Sample terminological entry structure:

Entry ID: TM-0023 Subject field: Terminology management Term: terminology database Definition: database containing terminology data Source: ISO 30042:2019 Grammatical information: noun, singular Context: “The terminology database should be regularly maintained to ensure its relevance and accuracy.” Related concepts: terminology resource, termbase

6.2.2 Concept orientation

Terminology resources shall be concept-oriented, meaning that:

a) Each entry represents one concept

b) All terms designating the same concept are included in the same entry

c) Relationships between concepts are explicitly documented

d) Each entry is assigned to at least one subject field

6.2.3 Data categories

Terminology resources shall use a consistent set of data categories for terminological information in accordance with ISO 30042:2019.

Data categories should be:

a) Clearly defined

b) Consistently applied

c) Compatible with international standards

d) Appropriate for the intended use

e) Documented in a data category registry

6.2.4 Metadata

Terminology resources shall include appropriate metadata to facilitate management and use, including:

— Resource identification information

— Creation and modification dates

— Version information

— Responsibility information

— Usage rights and permissions

— Processing history

6.3 Functional requirements

6.3.1 Search and retrieval

Terminology resources shall provide effective search and retrieval capabilities, including:

a) Multiple search criteria (term, definition, subject field, etc.)

b) Flexible matching options (exact, fuzzy, wildcard, etc.)

c) Filtering by various attributes

d) Sorting options for search results

e) Search history and saved searches

6.3.2 Data import and export

Terminology resources shall support data exchange through:

a) Import from common terminology formats

b) Export to standard exchange formats, particularly TBX (ISO 30042:2019)

c) Batch processing of multiple entries

d) Selective import and export by criteria

e) Data conversion utilities

6.3.3 User management

Terminology management systems shall include user management functions:

a) Role-based access control

b) Customizable user permissions

c) Authentication mechanisms

d) User activity tracking

e) Collaborative features

6.3.4 Workflow support

Terminology management systems shall support established workflows:

a) Task assignment and tracking

b) Status tracking for terminology entries

c) Approval processes

d) Notification mechanisms

e) Integration with content creation systems

6.4 Quality requirements

6.4.1 Data validation

Terminology resources shall implement validation mechanisms to ensure data quality:

a) Format validation for specific data categories

b) Mandatory field checking

c) Consistency checking across entries

d) Duplicate detection

e) Reference integrity checking

6.4.2 Revision control

Terminology resources shall maintain revision history:

a) Change tracking at the entry level

b) Version comparison

c) Rollback capabilities

d) User attribution for changes

e) Timestamp information

6.4.3 Compliance checking

Terminology resources shall support compliance with terminology policies:

a) Automated term verification in content

b) Consistency checking against approved terminology

c) Reporting on terminology usage

d) Identification of deprecated terms

e) Detection of unapproved synonyms

6.5 Documentation requirements

6.5.1 User documentation

Terminology resources shall be accompanied by comprehensive user documentation:

a) User guides for different user roles

b) Tutorial materials

c) FAQ documents

d) Best practice guidelines

e) Quick reference materials

6.5.2 Administrative documentation

Terminology resources shall include administrative documentation:

a) System architecture and design specifications

b) Data models and schemas

c) Configuration parameters

d) Backup and recovery procedures

e) Integration specifications

6.5.3 Process documentation

Terminology management processes shall be documented:

a) Terminology workflows and procedures

b) Decision-making processes

c) Quality assurance protocols

d) Change management procedures

e) Implementation guidelines

6.6 Integration requirements

6.6.1 Authoring system integration

Terminology resources shall integrate with content authoring systems:

a) Real-time terminology verification

b) Term suggestion capabilities

c) Context-sensitive terminology lookup

d) Direct access to terminology resources from within authoring tools

e) Automated terminology extraction from draft content

6.6.2 Translation system integration

Terminology resources shall integrate with translation tools:

a) Compatibility with translation memory systems

b) Support for multilingual terminology management

c) Term recognition in translation interfaces

d) Terminology consistency checking during translation

e) Terminology extraction from aligned bilingual content

6.6.3 Content management integration

Terminology resources shall integrate with content management systems:

a) Shared authentication mechanisms

b) Synchronized metadata

c) Terminology status aligned with content lifecycle

d) Terminology reporting within content management analytics

e) Automated terminology updates across content repositories

7 Terminology presentation rules and requirements

7.1 General

Terminology presentation rules establish standardized formats for displaying terminological data in various contexts, ensuring clarity, consistency, and usability. Proper presentation enhances the accessibility and effectiveness of terminology resources for all users.

The presentation rules outlined in this section are based on the guidelines provided in ISO 10241-1:2011 for terminological entries and ISO 10241-2:2012 for adopted terminological entries.

7.2 Terminological entry presentation

7.2.1 General layout

The layout of terminological entries shall follow these general principles:

a) Each entry shall be visually distinct and clearly separated from other entries

b) Core components shall be presented in a consistent sequence

c) Typographical devices shall be used consistently to distinguish different data categories

d) The layout shall facilitate quick identification of key information

EXAMPLE Example of a well-structured terminological entry:

terminology database

database containing terminology data

NOTE Terminology databases may contain additional information such as definitions, context examples, notes, and multimedia representations.

7.2.2 Term representation

Terms shall be presented according to these rules:

a) The preferred term shall be highlighted or presented first

b) Synonyms shall be clearly marked and distinguished from the preferred term

c) Deprecated terms shall be marked as such with appropriate labels

d) Term status shall be indicated using consistent markers

e) Terms shall be presented in their basic form unless otherwise required

EXAMPLE Preferred term: **terminology database** Synonym: termbase Deprecated: term bank [DEPRECATED]

7.2.3 Definition presentation

Definitions shall be presented according to these rules:

a) Definitions shall be clearly distinguished from other entry elements

b) Definitions shall be presented as a single coherent unit

c) The first word of a definition shall not repeat the term being defined

d) Definitions shall follow a consistent grammatical pattern based on the concept type

e) Cross-references in definitions shall be clearly marked

7.2.4 Subject field indication

Subject field information shall be presented:

a) In a consistent location within the entry

b) Using standardized subject field designations

c) With appropriate hierarchical indication when necessary

d) In a way that clearly associates it with the concept rather than with individual terms

7.2.5 Source references

Sources of terminological information shall be presented:

a) Using a consistent citation format

b) With clear indication of which element the source applies to (term, definition, etc.)

c) With sufficient information to locate the original source

d) Using standard abbreviations when appropriate

e) With date information to indicate currency

7.3 Presentation in specialized contexts

7.3.1 Presentation in standards

Terminological entries in standards shall follow the specific rules established in ISO 10241-1:2011 and ISO 10241-2:2012, including:

a) Placement in a dedicated “Terms and definitions” section

b) Sequential or systematic ordering

c) Consistent entry structure

d) Proper cross-referencing to other standards

e) Clear indication of adopted terms

EXAMPLE Example of a terminological entry in a standard document:

terminology management

management of terminology resources through the systematic collection, description, processing, and presentation of concepts and their designations

[SOURCE: ISO 704:2009]

Figure 1

7.3.2 Digital presentation

Terminology presented in digital formats shall follow these additional requirements:

a) Hyperlinks for cross-references and sources

b) Appropriate use of metadata for improved searchability

c) Consistent layout across different viewing devices

d) Clear indication of expandable/collapsible content

e) Accessible formatting for screen readers and other assistive technologies

7.3.3 Multilingual presentation

Multilingual terminology shall be presented according to these rules:

a) Consistent indication of language for each element

b) Clear visual distinction between languages

c) Alignment of corresponding elements across languages

d) Appropriate handling of script and directionality differences

e) Indication of term equivalence status (full equivalent, partial equivalent, etc.)

EXAMPLE Example of a multilingual entry:

terminology database (en) database containing terminology data

base de données terminologique (fr) base de données contenant des données terminologiques

Terminologiedatenbank (de) Datenbank mit terminologischen Daten

7.4 Typographical and formatting conventions

7.4.1 Typographic distinctions

Different data categories shall be distinguished using consistent typographic conventions:

a) Terms may be presented in bold

b) Definitions may be presented in regular type

c) Sources may be presented in italic or smaller type

d) Notes may be presented in smaller type or indented

e) Cross-references may be presented in a distinctive font or color

7.4.2 Symbols and markers

Special symbols and markers shall be used consistently:

a) Symbols indicating term status (preferred, admitted, deprecated)

b) Markers for grammatical information

c) Indicators for usage restrictions

d) Symbols for cross-referencing

e) Markers for context and examples

7.4.3 Abbreviations and labels

Abbreviations and labels used in terminological entries shall be:

a) Standardized across the terminology resource

b) Explained in a key or legend

c) Used consistently

d) Intuitive where possible

e) Compliant with relevant domain conventions

7.5 Presentation requirements for specific data categories

7.5.1 Grammatical information

Grammatical information shall be presented:

a) In a consistent format and position

b) Using standard abbreviations

c) With clear distinction between different grammatical attributes

d) In accordance with the linguistic conventions of each language

7.5.2 Context examples

Context examples shall be presented:

a) Clearly distinguished from definitions

b) In a consistent format (e.g., italics, quotation marks)

c) With the term highlighted or emphasized within the context

d) With source attribution when applicable

e) In sufficient quantity to illustrate typical usage

7.5.3 Notes and supplementary information

Notes and supplementary information shall be presented:

a) Clearly distinguished from the definition

b) In a consistent location

c) Numbered if multiple notes exist

d) With clear indication of their purpose

e) In a hierarchical structure if appropriate

7.5.4 Concept relations

Concept relations shall be presented:

a) Using standardized relationship indicators

b) With clear distinction between different relation types

c) With consistent formatting for all related concepts

d) With appropriate directional indicators for hierarchical relations

e) With cross-references to the related concepts

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1) Cancelled and replaced by ISO 12616-1:2021.

2) Cancelled and replaced by ISO 12620-1:2022.

Price based on 18 pages