ISO/IEC 20016-1:2014-02 (E)

Information technology for learning, education and training - La nguage accessibility and human interface equivalencies (HIEs) in e-learning applications - Part 1: Framework and reference model for semantic interoperability

Contents

Page

Foreword viii

Introduction ix

0 Introduction ix
0.1 Purpose and overview ix
0.2 Benefits to implementers of this multipart ISO/IEC 20016 standard x
0.3 Primary sources of requirements xi
0.4 Key concept of “individual accessibility” xiii
0.5 Holistic approach xiv
0.6 Use of "jurisdictional domain", jurisdiction, country xix
0.7 Use of "person", "individual, "organization", "public administration" and “person” xx
0.8 Importance of definitions and terms xxi
0.9 Standard based on rules and guidelines xxii
0.10 Size of document and role of “iso/iec 20016-1 *framework and reference model for semantic interoperability*” xxii
0.11 Organization and description of document xxiii

1 Scope 1
1.1 Statement of scope – Multipart standard 1
1.2 Scope of this part of ISO/IEC 20016 “framework and reference model for semantic interoperability” 2
1.3 Exclusions 3
1.3.1 Physical aspects of individual accessibility 3
1.3.2 Person: individuals, organizations, and public administrations 3
1.3.3 Artificial languages: Programming languages, Mark-up languages, etc 3
1.3.4 Non-recorded information 4
1.3.5 Determining the individual's capability(ies) to communicate in a language(s) 4
1.3.6 Universal design and related Functional Services View (FSV) aspects 4
1.3.7 General aspects of culture and environment 5
1.4 Aspects not currently addressed in this 1edition 5
1.4.1 Introduction - Focus and scope of 1 edition of ISO/IEC 20016-1 5
1.4.2 The creation of accessible HIEs 5
1.4.3 Rules and procedures governing the four quadrants (each or combinations) of the Human Interface Equivalency Model (HIEM) 5
1.4.4 Creation of abbreviations and acronyms as HIEs 6
1.4.5 Template for specifying semantic interoperability requirements 6
1.4.6 Localization aspects 6
1.4.7 Various aspects of HIE semantic collaboration space (SCS) 6
1.4.8 Role of an “AfA agent” 6
1.4.9 Privacy protection, consumer protection, human rights, etc. 7
1.5 IT-systems environment neutrality 7

2 Normative references 8

3 Terms and definitions 8

4 Symbols and abbreviated terms 35

5 Conformance 37
5.1 Introduction 37
5.2 Conformance to this part of ISO/IEC 20016 “framework and reference model” 37

6 Fundamental principles and assumptions 37
6.1 Introduction 37
6.2 Principles governing the ISO/IEC 20016 multipart standard 39

6.2.1 Principle #1 - Support the requirements of the *UN Convention on the Rights of Persons with Disabilities* 39
6.2.2 Principle #2 - Support requirements of jurisdictional domains on language accessibility and Human Interface Equivalents (HIEs) 39
6.2.3 Principle #3 - Support linguistic diversity and cultural adaptability of individual users around the world 40
6.2.4 Principle #4 - Inclusive design 40
6.2.5 Principle #5 - Multiple source languages 41
6.2.6 Principle #6 - Rule-based approach 41
6.2.7 Principle #7 - Ability to support various levels of granularity and scale-ability 42
6.2.8 Principle #8 - Integrated approach to internal and external constraints 42
6.2.9 Principle #9 - Maximize use of existing international standards and specifications 43
6.2.10 Principle #10 - Maximize an approach which is systematic, IT-enabled, supports computational integrity, and yet is (specific) IT-platform neutral 43
6.2.11 Principle #11 - Support the three strategic directions of ISO/IEC JTC1 standards development namely: (1) portability; (2) Interoperability; and, (3) and cultural adaptability 44
6.3 Added principles governing the development of ISO/IEC 20016-1 44

7 Semantic interopability and levels of semantic equivalency 44
7.1 Introduction 44
7.2 Summary of UN convention (and related requirements) 44
7.3 Levels of semantic equivalence 45

8 Public policy requirements of jurisdictional domains 47
8.1 Introduction 47
8.2 Jurisdictional domains and public policy requirements 47
8.3 Individual accessibility 48
8.3.1 Introduction 48
8.3.2 *UN Convention on the Rights of Persons with Disabilities* as a key public policy requirement 48
8.3.3 Individual accessibility 49
8.4 Consumer protection 51
8.5 Privacy protection 52
8.6 Human rights (other) 53
8.7 Public policy requirements and localization aspects 53
8.8 Use of “AfA agents” and third parties in decision-taking and commitment-making 54

9 Semantic collaboration space and levels of semantic unambiguity 54
9.1 Introduction 54
9.2 (HIE) Semantic Collaboration Space 56
9.3 Two perspectives of a Semantic Collaboration Space (SCS): Semantic Operational View (SOV) AND Functional Services Support View (FSSV) 58

10 Rules governing use of language and language accessibility 59
10.1 Introduction 59
10.2 Choice of language – internal constraints perspective 60
10.3 Choice of language – external constraints perspective 62
10.3.1 Introduction 62
10.3.2 Official (or “de facto”) language 62
10.3.3 Legally Recognized Language (LRL) 64
10.4 Individual accessibility language 65
10.5 Gender, and official, de facto, or LRL languages 65
10.6 Declared Semantic Equivalent (DSE) 67

11 Levels and degrees of linguistic equivalence 67
11.1 Introduction 67
11.2 Levels of lexical (quantitative) equivalency 68
11.3 Degrees Of Linguistic Equivalences (DLE) 68
11.4 Use of ISO 5964 in ISO/IEC 20016 68

12 Human Interface Equivalency Model (HIEM) 69
12.1 Introduction 69
12.2 Approach and key requirements 69

12.3 The Human Interface Equivalency Model (HIEM) itself 70
12.4 Role of a HIE identifier 72

13 Template for specifying individual accessibility requirements applicable to any HIE as a SRI 72
13.1 Introduction to and purpose of template 72
13.2 Template structure and content 73
13.2.1 IT-interface needs perspective 73
13.2.2 Human interface needs perspective 74
13.3 General rules governing use of template 75
13.4 Specific rules governing entries in the template 75
13.5 Template 75

14 Rules governing the structure, management and addition of new parts of this multipart standard 75
14.1 Introduction 75
14.2 Default template for “table of contents” of parts of ISO/IEC 20016 75
14.3 Reserve ISO/IEC 20016-10 for a consolidated vocabulary 77

Annex A (normative) **Consolidated list of terms and definitions with cultural adaptability: ISO English and ISO French language equivalency** 78
A.1 Introduction 78
A.2 ISO English and ISO French 78
A.3 Cultural adaptability and quality control 78
A.4 Organization of ANNEX A - Consolidated list in matrix form 79
A.5 Consolidated list of ISO/IEC 20016-1 Terms and definitions 80

Annex B (normative) **Impacts and requirements of the UN Convention on the Rights of Persons with Disabilities on requirements for semantic interoperability for language accessibility and Human Interface Equivalents (HIEs)** 147
B.1 Introduction and purpose 147
B.2 Summary overview 147
B.3 Impact of the UN Convention on Rights of Persons with Disabilities (2006) 151
B.3.1 Objective of Clause B.3 151
B.3.2 Key objectives and requirements of the UN Convention impacting ISO/IEC 20016-1 Framework and Reference Model 151

Annex C (normative) **Degrees of linguistic equivalences based on ISO 5964** 155
C.1 Introduction and context 155
C.2 Purpose 155
C.3 Summary of ISO 5964 Degrees Of Linguistic Equivalence (DLE) 155
C.4 Application and use of ISO 5964 in an ISO/IEC 20016-1 context 157

Annex D (normative) **Individual Accessibility Model: (IAM)** 159
D.1 Introduction 159
D.2 Purpose 160
D.3 Key elements of the Individual Accessibility Model (IAM) 160
D.3.1 Introduction 160
D.3.2 Summary overview of Business Transaction Model (BTM) 160
D.3.3 Three key elements of the individual accessibility model 163

Annex E (normative) **Default conventions for unambiguous identification and referencing of codes representing jurisdictional domains (countries), languages and currencies in support of semantic interoperability** 165
E.1 Introduction 165
E.2 Purpose 167
E.3 Exclusions to Annex E 167
E.4 Current issues and approach taken 168
E.4.1 Summary of nature of issues pertaining to interworking of codes representing countries, languages, and currencies 168
E.4.2 ISO 3166-1 “Country Codes" 169
E.4.3 ISO 639-2 "Language Codes" 170
E.4.4 ISO 4217 "Currency Codes" 171

E.5 Principles governing approach taken 171
E.6 Common default conventions 172
E.6.1 Default convention #1 for the unambiguous identification and referencing of combinations of codes representing countries, languages and currencies in support of semantic interoperability 172
E.6.2 Default convention #2 for the ordering of codes representing countries, languages and currencies 172
E.7 Application of default convention #1 for identifying codes representing countries, languages and currencies with default convention #2 for ordering them 173
E.8 Examples of applying "default convention #1"" in an ITLET context 173

Annex F (normative) **Classes of constraints** 174
F.1 Introduction 174
F.2 Purpose 174
F.3 Constraints: internal and external 174

Annex G (informative) **Summary on issues of language equivalencies** 179
G.1 Introduction and context 179
G.2 Purpose 180
G.3 Summary notes on "language equivalency" 180
G.4 Bibliography 183

Annex H (informative) **Examples of multiple Human Interface Equivalents (HIEs) for a single IT-Interface Identifier** 185
H.1 Purpose and use of Annex H 185
H.2 Example 1: Taken from ISO 19135:2005 (E) 185
H.3 Example 2: Taken from ISO/IEC 5218:2004 187

Annex I (informative) **Examples of the need for specifying gender of terms and nouns to ensure unambiguity in the use of an official language** 190
I.1 Introduction 190
I.2 Organization of the ANNEX I matrix 190
I.3 Examples of the same word having two gender forms and two different meanings 191

Annex J (informative) **Case study of multilingual retrieval of HIEs for unilingual users: the "potato"** 192

Annex K (informative) **Notes on standard table of contents template for parts 2+ of ISO/IEC 20016** ... 195
K.1 Introduction 195
K.2 Notes on Clause 0 Introduction 195
K.3 Notes on Clause 1 Scope 195
K.4 Notes on Clause 2 Normative references 196
K.5 Notes on Clause 4 Symbols and abbreviated terms 196
K.6 Notes on Clause 5 Conformance 196
K.7 Notes on Clause 6 Fundamental principles and assumptions 196

Annex L (informative) **ISO/IEC 14662 open-edi reference model, commitment exchange and collaboration space** 197
L.1 Introduction 197
L.2 Relevance of open-edi reference model 198
L.3 Basic aspects of open-edi collaboration space: content provider and individual user 199

Annex M (informative) **Implementation considerations for the ISO/IEC 20016-1 *Framework and reference model*** 203
M.1 Introduction 203
M.2 Purpose 203
M.3 Implementation considerations 203
M.3.1 Application of Clause 1.4 "Aspects not currently addressed in this 1st edition" 203
M.3.2 Implementation of individual accessibility as a human right is enforced by jurisdictional domain requirements 203
M.3.3 Intended use of a SRI as prepared by a content provider 204
M.4 Example case studies as "scenarios" 205

Annex N (informative) **Contributors and acknowledgement** 208

Bibliography 209