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Translation and adaptation: intersecting relationships

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Abstract. The article analyses adaptation in relation to key categories and concepts in translation studies. The aim of the article is to substantiate sociocultural and pragmatic adaptation as a distinct translation method in its intersections with translation models, foreignization and domestication strategies, paradigms in translation studies, the concept of dynamic equivalence, and the category of coherence. Pragmatic adaptation is related to the functional model of translation, according to which the translator is guided by institution-specified parameters of the target text, adapting the source text to the target-text purpose. Sociocultural adaptation correlates with the denotative model, using it in cases where the choice of translation variant is impossible without reference to the situational context presented in the source text, as well as with the communicative model, which includes various components of the extralinguistic context. Both types of adaptation align with the informative model of translation, oriented towards conveying different types of information from the source text—not only denotative but also connotative, sociocultural, pragmatic, and encyclopedic. In terms of translation typology, adaptation correlates with transcoding – achieving text equivalence by simplifying its structure and content to make the translated text more accessible to an audience lacking the necessary knowledge. It also aligns with communicative translation, which aims to achieve an effect on the target text readers equivalent to that of the source text. From the perspective of the main paradigms in translation studies, adaptation strategies correlate with the cultural paradigm in its cognitive-semantic and real-cultural dimensions. Adaptation is applied in cases of linguistic, cultural, conceptual-semantic, value-based, normative, contextual, and idiomatic non-equivalence. In translation adaptation, the translator can apply either foreignization or domestication, or combine both. When using the domestication strategy, the main techniques involve free, idiomatic or communicative translation, and actual adaptation. The concept of adaptation is related to the dynamic equivalence, as opposed to formal equivalence. From the perspective of cohesion and coherence categories reproduced in translation, adaptation correlates with coherence, facilitating the transfer of the internal semantic connections of the text to the target text, moving from content and conceptual ideas to formal structure.

Key words: translation adaptation, models of translation, foreignization, domestication, paradigms in translation studies, dynamic equivalence, coherence.

Introduction. The issue of socio-cultural and pragmatic adaptation remains one of the most debated topics in modern translation studies (Davier, 2022; Papadakis et al., 2022; Pettini, 2024; Stewart, 2022; Sukmaningrum et al., 2022), as the possibility and necessity of using adaptive translation strategies are evaluated by researchers from polar perspectives. In several works, the concepts of translation and adaptation are treated as incompatible, with adaptation being assessed as an offensive form of translation that completely distorts the source text (Lambert, Gorp, 1985). In other studies, adaptation, on the contrary, is seen as an integral and necessary translation strategy – not only in literary translation, which may nominate alien realities for the target text's culture, but also in institutional translation.

For instance, Vinay and Darbelnet (1995), referring to adaptation as mediated translation, acknowledges the necessity of adapting translations of important documents, school textbooks, journal articles, movie scripts, etc. In agreement with this opinion is the statement of Gambier and Gottlieb, who argue that it is impossible to create an "easily understandable text" in the target language without using adaptive strategies (Gambier, Gottlieb, 2001: 34). Similar viewpoint is held by the Ukrainian researcher V. Demetska, who considers adaptation as a complementary type of any adequate translation (Demetska, 2007: 102). A third group of researchers evaluates adaptation and translation as concepts with "not intrinsic" boundaries between them, which are marked by their complex "re-dimensioning" in terms

of discourses and the respective textual corpora in relation to which adaptive strategies are used (Amorim, 2003: 195).

Despite the ambiguous assessments of translation adaptation, it is actively used in the practice of translating texts of different styles and genres. An unexplored aspect of contemporary translation studies remains the justification of adaptive strategies considering their correlation with key categories and concepts in translation theory: existing translation models, foreignization and domestication strategies, primary paradigms in translation studies, the concept of dynamic equivalence, and coherence category. This defines the research perspective of this article and its novelty for translation studies.

Literature review. In contemporary translation studies, translation adaptation is examined from various aspects – in terms of identifying its types, factors influencing the necessity of adaptation, its techniques, and methods.

In the perspective of types of adaptation, scholars distinguish two main taxonomic categories. Based on the criterion of the volume of adapted material, researchers identify local adaptation, applied to individual fragments of the source text, and global adaptation, which entails the reconstruction of the entire text (Baker, Saldanha, 2011: 46). Global adaptation may be initiated "externally" – by a specific institutional subject, the translation client, a publisher's decision, etc. and leads to the modification of the functional purpose of the text, its goals, and its impact on the translation audience (op. cit.). According to the functional criterion (the goals of adaptive strategies), socio-cultural and pragmatic adaptation are distinguished.

In carrying out socio-cultural adaptation, the translator as a mediator between the cultures of the original and translated texts, relies on one of these cultures, choosing adaptive strategies that facilitate the "integration" of the translation into it. Most often, in socio-cultural adaptation, the translator adjusts their text to the norms of the target culture (Jänis, Kemppanen, Belikova, 2012; Bowker et al., 2016), focusing on cultural realities and linguistic mentality of the target audience of the translation, thus facilitating its perception

and understanding. Less frequently, the translator may choose to orient towards the culture of the source text when selecting socio-cultural adaptation strategies, which can lead to deviation from the conventions of the target culture and complicate the perception of the translation text by the target audience (Venuti, 1995).

Among the factors of socio-cultural adaptation, researchers (Chang, 2009: 95; Birdwood-Hedger, 2006: 105) highlight: differences in the conceptualization by the recipients of the text in the target culture and the culture of the source text; differences in spatial-temporal perception of the world; presence of cultural gaps, nationally-specific realities, symbols, names, idioms, metaphors, allegories, wordplay, mismatched units of measurement, etc., in the original text; substantial differences in the syntactic and discursive organization of the two languages, in the established conventions of communicative behavior of certain ethnic groups reflected in texts; genre incongruity, for example, when transitioning from adult literature to children's literature and vice versa.

Among the techniques of socio-cultural adaptation, researchers identify various replacements of elements of the source text; reduction or implication of text fragments; addition of elements to clarify information in the main text, in introductions, footnotes, or glossaries; changes through syntactic transformations of cause-and-effect relationships; replacement of exoticisms, slang, dialects with approximate equivalents in the target language; translation through illustration; descriptive translation; transcription (transliteration); translation of expressive variants into neutral words; translation by replacing cultural realities with approximate realities of the target linguistic culture; translation using borrowed words with or without explanation; replacement of outdated information with modern equivalents. (Bastin, 2011: 3–6; 2014: 73–87).

Pragmatic adaptation aims to ensure not so much socio-cultural and linguistic-cultural equivalence between the target and source texts, but their equivalent communicative effect at the level of functional adequacy of the translation. Researchers link

the possibility and frequency of using pragmatic adaptation to the value in the functional perspective of the source text's pragmatic function: the closer such a function is to the dominant, the more adaptive strategies the translator needs to apply (Demetska, 2007: 102). Among the criteria of the source text that determine the necessity of applying pragmatic adaptation, scholars identify: stylistic devices of the source text; specific syntactic constructions; extratextual factors of the source text (time, place of communication) (Neubert, 2005: 56); different parameters of textual register (Halliday, 1964: 35).

Among the techniques of pragmatic adaptation in modern translation studies, the following are highlighted: explanation of the original information with an increase in the degree of its explicitness or implicitness (Chesterman, Wagner, 2002: 60–63); omission of information fragments while preserving only the key information of the original text; "updating" (replacement with modern equivalents) (Kosonen, 2011: 56); changing the level of formality, degree of involvement and in communicative roles; free translation; radical alteration of the source text; introduction of authorial presence in the text; "illocutionary changes". The latter technique traditionally involves changing the verb form, direct and indirect speech. However, in recent studies, the concept of pragmatic adaptation, based on this criterion, is refined into the category of illocutionary pragmatic adaptation as a type of translational reproduction of the original text, involving changes in the type of modality or intensification/deintensification of modal meanings depending on the variation in the translation text compared to the original text in terms of the illocutionary force of speech acts (Kravchenko et al., 2022; Markova, 2022).

The aim of the article is to substantiate sociocultural and pragmatic adaptation as a distinct translation method within the context of its intersections with translation models, foreignization and domestication strategies, paradigms in translation studies, the concept of dynamic equivalence, and the category of coherence.

Research methods. The article employs methods of induction and deduction,

as well as a comparative method for juxtaposing concepts and categories in translation studies that either suggest or exclude the application of translation adaptation. It also utilizes a descriptive method that combines inventory procedures (identifying translation concepts, approaches, and categories within which the phenomenon of adaptation is justified) and interpreting their interface with socio-cultural and pragmatic adaptation. Additionally, elements of comparative translation analysis are utilized.

Results and Discussion. In terms of the connection between adaptive strategies and translation models (Carl, 2023), pragmatic adaptation is primarily associated with the functional model (Nord, 1991), according to which the main task of the translator is to achieve compatibility between the intention of the source and target texts. At the same time, the functional model provides priority for the target-text purpose, referred to as *skopos*. This purpose and, accordingly, the "prospective function" of the target text (Nord, 1991: 17) are determined not by the translator but by a certain instance or institutional subject, whose instructions the translator must follow. Based on these instructions, the elements of the original text subject to adaptation in translation are determined (Nord, 1991: 21) to align it with the purpose and function of the target text.

It is logical to assume that in accordance with the functional model, adaptation can be not only local but also global – but also global, depending on the intention of the translation initiating agent. The main drawback of the functional model is the potential ethical conflict between the imposed translation method and the personality of the translator, who bears the final responsibility for adapting the source text according to criteria that may contradict their pre-translation analysis of the text, worldview, and experience.

Socio-cultural adaptation is primarily associated with denotative and communicative translation models (Selivanova, 2012). When using the denotative model, the approach to translation is determined by the replacement of signs denoting a specific situation in the source language with signs in the target language, recreating a similar situation relevant to the

target culture. This model is employed when the choice of translation variant is impossible without reference to the referential situation presented in the original text, specifying its additional aspects. Primarily, the model is used to reproduce non-equivalent lexicon and cultural references lacking equivalents in the target text's linguistic-cultural sphere. Adaptive strategies in this case are implemented through comments, footnotes, translation through illustration, descriptive translation, and direct borrowings with or without explanation.

For instance, the denotative model can be employed when translating the non-equivalent verb "barnstorm" (CD), which, depending on the situation, is translated adaptively – as a descriptive translation or commentary: "гастролювати по сільській місцевості, влаштовуючи театральні вистави", "керувати літаком під час екскурсійних польотів з пасажирами або в повітряних трюках, особливо в сільській місцевості". In situations associated with political discourse, such a verb is rendered in translation as "поїздки кандидатів під час виборчої кампанії з короткочасними зупинками в різних населених пунктах з метою агітації та згуртування потенційних виборців".

According to the communicative translation model, the key information for the translation process is the translator's knowledge about the author, as well as the cultural background of both the source and target texts, and realities of the own ethnic group and the other ethnic group. This knowledge includes a broad extralinguistic context about the country of origin of the original text, the author's motivation and purpose, the paradigm (literary-artistic, ideological, etc.) within which it was written, the historical period of its creation, the potential recipients of both texts with different worldviews, and the sociocultural realities that need to be reproduced in a new semiotic form (Kravchenko, Soshko, Markova, 2022), taking into account the expectations of the recipient from the other culture. According to the Ukrainian researcher A. Selivanova, translation from the perspective of the communicative model involves triple content correction of the original text (Selivanova, 2012: 450) – during its comprehension by the

translator, the creation of the translation, and the perception and interpretation by the recipient of the translated text.

Accordingly, to convey part of the information envisaged by the communicative model, particularly historical, sociocultural, and related to the existence and realities of another ethnic group, the translator can apply sociocultural adaptation. For example, the name of the hobbit Brockhouse from Tolkien's fantasy "The Lord of the Rings" (2004) is translated into Ukrainian (in the translation by Kateryna Onyshchuk (2013)) as "Борсухатий," based on lexicographic and country-specific information that Brock is an old word for badger, which was common in rural language until the end of the nineteenth century and was recorded in literature and dictionaries. Thus, "brockhouse" literally means "badger's house." Therefore, the translator chose the designation "Борсухатий," which captures the internal form of the original word, further adapted to a common word-formation model of the Ukrainian language.

Strategies of pragmatic and sociocultural adaptation are also related to the informative model of translation, which, unlike the semantic model, is not focused so much on reproducing the components of the lexeme's meaning structure as on conveying different types of information – denotative, connotative, sociocultural, genre-stylistic, pragmatic, and encyclopedic, which the source text contains and which the translator must decode or infer (if presented implicitly), followed by adaptation for its perception and interpretation by the target audience of the translation.

Sociocultural and pragmatic adaptations correlate with existing typologies of translations in translation studies. According to Jean Delisle's typology, among the eight classes of translations based on four different characteristics, adaptive strategies are associated, in our opinion, with such a type of translation (according to the criterion of the translation approach used to create the target text), as transduction. Unlike transcoding that aims at achieving word equivalence, transduction creates equivalence of the entire message/text (Delisle, 2013) by simplifying its structure and content to make the translated text more

accessible to an audience lacking the necessary knowledge.

Analyzing Newmark's typology of translations by the criterion of orientation towards the target text, we can conclude that adaptation correlates with communicative translation, which aims to achieve an effect on the target text readers that is as close as possible to that achieved on the original text readers (Newmark, 1981: 39), and is contrasted in this respect with semantic translation, which attempts to render the semantic and syntactic structures of the target language. Among the main five methods of translation, Newmark notes adaptation, as well as free translation, which can also implement adaptive strategies.

From the perspective of the main paradigms in translation studies, adaptation strategies correlate most strongly with the cultural paradigm in both its cognitive-semantic and socio-cultural dimensions. The first dimension considers culture manifested in texts as "culture in language," revealing the linguistic worldview of a particular community through cognitive-semantic structures such as concepts and conceptual domains that integrate them. The second dimension, "culture described by language," is related to how the specificity of culture, national realities, and other cultural attributes are represented in the content of the translated text.

Adaptation is related to cultural aspects such as:

1. Linguistic and cultural non-equivalence: This reflects the degree of social significance of a particular concept for a specific ethnic group (e.g., up to ten types of snow for the Eskimos; numerous terms for horse colors among Argentine gauchos).

2. Conceptual-semantic non-equivalence: the way of conceptualizing the world by the source linguistic culture, its world picture, reflected in the "linguistic worldview," which is one of the reasons for the difficulties that arise during translation, necessitating adaptation strategies. Unique culturally marked concepts of ethnic linguistic mentality may not have an exact equivalent in another language. The key concepts for the English world picture is PRIVACY, denoting the individual's right to personal autonomy, extending throughout the structure of the

state, from the foundations of legislation to the home traditions. An exact lexical equivalent of this concept is absent in Ukrainian and in other European languages, which necessitates the use of adaptive strategies.

3. Differences in values and norms of behavior: These must be considered by the translator to avoid flouting the cultural-communicative expectations of the target recipient. For instance, British culture sets norms of behavior that impose restrictions on asymmetrical communication. Emphasizing status by both the superior and their subordinates, i.e., which is often inherent in communicative behavior in Ukrainian culture, is considered "face-threatening" in English culture. The word "deference" itself is perceived by the English as outdated.

4. The differences in cultural context and cultural realities including ethnographic knowledge, historical facts, geographical realities denoted by the source text, features of government structure, folklore traditions, specific aspects of everyday life, and the material culture of the past and present of a particular people as reflected in the original text. For example, in English homes, bedrooms are often located on the second floor, so the phrase "I'll go up" should be adapted in translation to "час лягати спати" The importance of adapting the original text to the target culture is especially evident when translating passages referring to thematic areas such as customs and traditions, sports and games, food and dishes, and holidays, including their dates (for example, Father's and Mother's Days differ across various linguistic cultures).

Realities, during the translation of which it is appropriate for the translator to use adaptive strategies, can be divided into: (a) Words unique to a particular linguistic culture: "Christmas yule log" (English) — спалення різдвяного поліна, що символізує народження Ісуса та його перемогу над гріхом; (b) Words that denote the same concept but have different functional and culturally specific meanings: "cuckoo's call" (English) – in different linguistic cultures, this phrase refers to the same referent, "the call of the cuckoo." However, for Americans, it is associated with the number of years until a girl gets married; Ukrainians, regardless of

gender, count the cuckoo's calls to find out how many years they have left to live; (c) Lacunas: "cloverleaf" (MW) – "розв'язка між двома основними магістралями, яка дозволяє транспорту змінюватися з однієї на іншу без поворотів ліворуч або перехресть, і яка зверху нагадує форму листка конюшини".

5. The differences in idiomatics and cultural associations related to the use of idioms, allegories, symbols, nationally specific wordplay, proverbs, and jokes in the original text often prompt the translator to use adaptation strategies to preserve the meaning and emotional-expressive connotations. For example, in English, the idiom "keep fingers crossed" means "to hope that nothing bad happens." In Ukrainian linguistic culture, preventing undesirable outcomes is conveyed by the verb "ляяти" or another idiom "тримати кулаки" (keep fists). Thus, translating the phrase "This meeting is extremely important to me, so keep your fingers crossed for me" into Ukrainian, a translator might use an adaptive strategy: «Ця зустріч вирішить мою долю, отже, лай мене».

Thus, adaptation is applied in cases of linguistic, cultural, conceptual-semantic, value-based, normative, contextual, and idiomatic non-equivalence.

When performing translation adaptation, the translator can apply one of two basic strategies – foreignization or domestication ((Birdwood-Hedger, 2006; Vinay, Darbelnet, 1995; Yonamine, 2022), or combine both. By implementing the foreignization strategy, the translator adapts the foreign text to the language of translation and its culture, ensuring the preservation of elements of the other culture by integrating them into their own culture. The domestication strategy, on the contrary, aims to create a translated text that does not contain "foreign" elements of the original text and does not reflect its cultural features, so that the translation is perceived by the reader as a text in their native language within their native cultural context. Domestication is primarily applied when translating words with rich cultural connotations, which indicate not only objects and phenomena but also the attitude towards them by representatives of the respective linguistic culture, whose

consciousness implicitly contains information related to these objects and phenomena.

When using the domestication strategy, the leading techniques are free translation, which conveys the factual content while neglecting the form; idiomatic translation; communicative translation—reproducing the original text using typical communicative constructions of the translation language; and actual adaptation. For example, the phrase "Charles' aunt, Miss Pittypat Hamilton, had written her several times..." is translated into Ukrainian as «Чарлзова тітонька, міс Дріботуп Гамільтон». Commenting on such a locally adaptive translation, L. Slavova and N. Borysenko note that "the occasionalism 'дріботуп' is the result of morphological word formation from the bases 'дріб' – frequently repeated, short, intermittent sounds resulting from hitting something, and 'туп' – onomatopoeia indicating the sound of walking" (Slavova, Borysenko, 2023: 38).

The concept of adaptation is related to the categories of formal and dynamic equivalence (Nida, 2003). Unlike formal equivalence, which involves the correspondence of content and expression units in the original and translated texts, dynamic equivalence is based on the principles of equivalent effect, focusing on the reaction of readers to both the original and translated texts, which often entails adaptive strategies.

From the perspective of the categories of cohesion and coherence (Halliday, Hasan 1976: 4), which are reproduced in translation, adaptation correlates with coherence as the semantic interconnectedness of the text, when the translator uses a top-down analytical model – from content and conceptual ideas to formal structure. This contrasts with the bottom-up analysis model, which moves from formal elements to content and is associated with reproducing cohesion. Since the links between elements of the text are often expressed implicitly and at the level of subtext, in reproducing coherence, the translator can enhance the internal connectedness of the text by using adaptive strategies that take into account the competence and knowledge of the target audience of the translation.

Conclusion. The article substantiates the attribution of adaptation to translation

strategies based on identifying the connection of adaptive techniques with key categories and concepts of translation studies: existing translation models, foreignization and domestication strategies, main paradigms in translation studies, the concept of dynamic equivalence, and coherence category reproduced in translation. Pragmatic adaptation is related to the functional model of translation, according to which the translator is guided by institution-specified parameters of the target text, adapting the source text to the target-text purpose. Sociocultural adaptation correlates with the denotative model, using it in cases where the choice of translation variant is impossible without reference to the situational context presented in the source text, as well as with the communicative model, which includes various components of the extralinguistic context. Both types of adaptation align with the informative model of translation, which is oriented towards conveying different types of information from the source text – not only denotative but also connotative, sociocultural, pragmatic, and encyclopedic.

In terms of translation typology, adaptation correlates with transcoding, and communicative translation. From the

perspective of the main paradigms in translation studies, adaptation strategies correlate with the cultural paradigm in its cognitive-semantic and real-cultural dimensions. Adaptation is applied in cases of linguistic, cultural, conceptual-semantic, value-based, normative, contextual, and idiomatic non-equivalence.

In translation adaptation, the translator can apply one of two main strategies—foreignization or domestication – or combine both. When using the domestication strategy, the main techniques are free translation, idiomatic translation, communicative translation, and actual adaptation.

The concept of adaptation is related to the categories of dynamic equivalence, as opposed to formal equivalence. From the perspective of cohesion and coherence categories reproduced in translation, adaptation correlates with coherence, facilitating the transfer of the internal semantic connections of the text to the target text, moving from content and conceptual ideas to formal structure.

The prospect of future research involves analyzing the relationships between adaptation and translation transformations.

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Переклад і адаптація: до проблеми перетину

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Анотація. У статті проаналізовано поняття перекладацької адаптації у ракурсі ключових категорій і понять перекладознавства. Метою статті є обґрунтування адаптації як перекладацького

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методу з огляду на її перетин з моделями перекладу, стратегіями чужинізації та одомашнення, парадигмами в перекладознавстві, концепцією динамічної еквівалентності та категорією когерентності. Прагматична адаптація пов'язана з функціональною моделлю перекладу, згідно з якою перекладач керується встановленими певною інституцією функціональними параметрами цільового тексту, адаптуючи до його мети вихідний текст. Соціокультурна адаптація співвідноситься з денотативною моделлю, використовуючи її в тих випадках, коли вибір варіанта перекладу неможливий без звернення до ситуативного контексту, представленого в вихідному тексті, а також з комунікативною моделлю, що включає різні компоненти екстралінгвістичного контексту. Обидва типи адаптації узгоджуються з інформативною моделлю перекладу, орієнтованою на відтворення різних типів інформації вихідного тексту – не лише денотативної, але й конотативної, соціокультурної, прагматичної та енциклопедичної. З точки зору типології перекладу, адаптація корелює з транскодуванням – досягненням еквівалентності тексту шляхом спрощення його структури та змісту, щоб зробити перекладений текст більш доступним для аудиторії, компенсуючи брак необхідних знань. Адаптація також узгоджується з комунікативним перекладом, який має на меті досягти впливу на читачів цільового тексту, еквівалентного ефекту вихідного. З точки зору основних парадигм у перекладознавстві стратегії адаптації насамперед співвідносяться з культурною парадигмою в її когнітивно-семантичному та реально-культурному вимірах. Адаптація застосовується у випадках мовної, культурної, концептуально-семантичної, ціннісної, нормативної, контекстуальної та ідіоматичної нееквівалентності. При адаптації перекладу перекладач може застосувати стратегію форенізації або доместикації, або поєднувати обидві. При використанні стратегії доместикації перекладач використовує вільний, ідіоматичний або комунікативний переклад і власне адаптацію. Поняття адаптації пов'язане з динамічною еквівалентністю vs. формальної еквівалентності. З точки зору категорій когезії та когерентності, відтворених у перекладі, адаптація корелює з когерентністю, сприяючи перенесенню внутрішніх семантичних зв'язків вихідного тексту в цільовий текст і забезпечуючи перехід від змісту та концепту-ідеї до формальної структури. Перспективою для майбутніх досліджень вбачаємо аналіз взаємозв'язків між адаптацією і перекладацькими трансформаціями.

Ключові слова: перекладацька адаптація, моделі перекладу, форенізація, доместикація, парадигми в перекладознавстві, динамічна еквівалентність, когерентність.