

**PARAMETERS FOR THE TERTIARY TRAINING OF SUBTLERS
IN SOUTH AFRICA:
INTEGRATING THEORY AND PRACTICE**

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ABSTRACT

This study is aimed at integrating theory and practice in the training of subtitlers in South Africa. In spite of the apparent benefits of subtitling for South Africa (improved access to information for viewers with impaired hearing and non-first language speakers of English, raised literacy levels and the promotion of language acquisition), subtitling has not been implemented on a large scale. However, there does seem to be a higher incidence of subtitling on SABC television, albeit of an uneven quality.

This study attempts to define the parameters for the training of subtitlers in order to provide in the demand for this type of language transfer. Although the demand is as yet non-existent, PANSALB recognises subtitling as a valid way of addressing a number of language-related problems. In anticipation of the large-scale implementation of subtitling, it is worth initiating training for subtitlers who will be able to supply in this demand in a professional way when it does occur.

Subtitler training needs to be firmly rooted in the user needs of South African viewers. Chapter 1 provides an analysis of the needs of viewers with impaired hearing (including pre-lingual and post-lingual deafness), viewers with low literacy levels, as well as viewers who are non-first language speakers of English. The needs of these groups are defined in terms of reading rate, access to non-linguistic audio elements, language structures, phoneme-grapheme correlation, translation, and vocabulary.

Chapter 2 investigates existing subtitler courses in other (predominantly developed) countries. Aspects that shape these courses include the national context of subtitling, training aims, academic level, duration, course content, subtitling software and equipment used, practicums, entry levels, candidates envisaged, and the (non) use of scripts. The courses range from vocational to academic-theoretical.

Chapter 3 proposes an outline for a South African curriculum for the training of subtitlers by integrating the domestic user-based parameters (chapter 1) and the aspects that shape existing courses in other countries (chapter 2). The curriculum is defined in terms of outcomes that are broken down into knowledge and skills required for their attainment.

Chapter 4 addresses a perceived lack in existing subtitling theory, namely the absence of a model for balancing equivalence and condensing. The chapter proposes a semiotic model for subtitling that is aimed at providing a framework for South African subtitlers, as well as contribute to the international debate on equivalence in subtitling.

Keywords: subtitling, subtitler training, parameters, deaf awareness, multilingualism, language acquisition, curriculum, equivalence.

PARAMETERS VIR DIE TERSIËRE OPLEIDING VAN ONDERTITELAARS IN SUID-AFRIKA: TEORIE EN PRAKTYK GEÏNTEGREER

OPSOMMING

Hierdie studie is daarop gemik om teorie en praktyk in die opleiding van ondertitelaars in Suid-Afrika te integreer. Ten spyte van die ooglopende voordele wat ondertiteling vir Suid-Afrika inhou (verbeterde toegang tot informasie vir kykers wat gehoorgestremd of nie-moedertaalsprekers van Engels is, verhoogde geletterdheidsvlakke en die bevordering van taalverwerwing), word ondertiteling nog nie op groot skaal geïmplementeer nie. Hoewel onderbenut wil dit egter voorkom of ondertiteling meer gereeld op SABC-televisie gebruik word, alhoewel die gehalte nie altyd ewe goed is nie.

Hierdie studie poog om parameters vir die opleiding van ondertitelaars daar te stel ten einde te voorsien in 'n behoefte aan sodanige taaloordrag. Alhoewel die vraag daarna nog nie bestaan nie, erken PANSAT ondertiteling as 'n geldige manier om 'n hele aantal taalverwante probleme aan te spreek. Dit is nieteenstaande die moeite werd om in afwagting van die grootskaalse implementering van ondertiteling te begin om ondertitelaars op te lei wat op 'n professionele manier in die behoefte sal kan voorsien.

Die opleiding van ondertitelaars moet stewig gegrond wees in die gebruikersbehoefte van Suid-Afrikaanse kykers. Hoofstuk 1 bevat 'n analise van die gebruikersbehoefte van kykers met gehoorgestremdheid (insluitend voor-talige en na-talige doofheid), kykers met lae geletterdheidsvlakke, sowel as kykers wat nie-moedertaalsprekers van Engels is nie. Die behoeftes van hierdie gebruikers word gedefinieer in terme van leesspoed, toegang tot nie-talige klankelemente, taalstrukture, foneem-grafeem korrelasie, vertaling en woordeskat.

Hoofstuk 2 ondersoek bestaande ondertitelaaropleidingskursusse in ander (hoofsaaklik ontwikkelde) lande. Hierdie kursusse word belyn deur aspekte soos die nasionale konteks van ondertiteling, opleidingsdoelwitte, akademiese vlak, duur, kursusinhoud, ondertiteling sagteware en toerusting, praktikums, toelatingsvlakke, kandidate beoog, en die gebruik (of nie) van draaiboeke. Die kursusse wissel van beroepsgerig tot akademies-teoreties.

Hoofstuk 3 stel 'n raamwerk voor vir 'n Suid-Afrikaanse kurrikulum vir die opleiding van ondertitelaars deur die plaaslike verbruikersbehoefte (hoofstuk 1) en die aspekte wat bestaande ondertitelaaropleidingskursusse in ander lande belyn (hoofstuk 2) met mekaar te integreer. Die kurrikulum word gedefinieer in terme van

uitkomst wat opgebreek word in kennis en vaardighede benodig vir die bereiking hiervan.

Hoofstuk 4 spreek 'n skynbare leernte in bestaande ondertitelingsteorie aan, naamlik die gebrek aan 'n model om ekwivalensie en kondensering te balanseer. Die hoofstuk stel 'n semiotiese model voor vir ondertiteling wat daarop gerig is om 'n raamwerk vir Suid-Afrikaanse ondertitelaars daar te stel, sowel as 'n bydrae te lewer tot die internasionale debat oor ekwivalensie in ondertiteling.

Trefwoorde: ondertiteling, ondertitelaaropleiding, parameters, doofbewussyn, veeltaligheid, taaverwerwing, kurrikulum, ekwivalensie.

PREFACE

I would like to give my sincere thanks to the following persons/institutions for their support during the study:

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- PANSALB
- The University of Copenhagen
- SBS
- The Australian Caption Centre.

This study was initially reported on in article format. Chapters 1 to 4 each correspond to an article that has either been published or has been accepted for publication. Details are included on the page preceding the particular chapter. Guidelines for authors from the scientific journals involved are included in Addenda B and C.

In the case of co-authored articles, permission has been obtained from the author to submit the article for degree purposes.

Sydney, July 2005

**PERMISSION STATEMENT TO SUBMIT ARTICLES
FOR EXAMINATION PURPOSES**

I, J.L. Kruger, co-author of the two articles listed below, hereby declare that the input and effort of H.C. Kruger in writing these articles was of sufficient scope to be a reflection of her own efforts. I hereby grant permission that she may submit these articles for examination purposes, in partial fulfilment of the requirements for the degree Philosophiae Doctor in English.

- *User-based parameters for the training of subtitlers in South Africa (Chapter 1)*
- *Existing subtitle training programmes and challenges for South Africa as a developing country (Chapter 2)*

Signed on this day _____ in Vanderbijlpark, at the North-West University.

J.L. Kruger

Promoter

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INTRODUCTION

0.1 Introduction and problem statement

Subtitling is not a well-known phenomenon in South Africa, although it holds many advantages for a multilingual, developing country. Research in other countries has shown that subtitling is an effective way of improving access to information for otherwise marginalised groups, raising literacy levels and addressing issues concerning language rights. One of the major findings of a recent research project on Subtitling in South Africa (Kruger *et al.*, 2000:1), was that subtitling is underutilised. The report recommends the introduction of legislation to make the subtitling of a certain number of hours of television programming compulsory, as is already the case in countries such as Britain, the USA and Australia.

0.1.1 Possible benefits of subtitling for South Africa

Although it does not fall within the scope of this study to provide a detailed analysis of the potential benefits of subtitling for South Africa, a summary of benefits will be useful in providing a context for the elaboration of a uniquely South African programme for subtitler training. Based on the implementation of subtitling in other countries, as well as extensive research into the benefits of subtitling for particular user groups in those countries, the next section will briefly outline the three most important advantages that subtitling may have for South Africa as a multilingual, developing country.

One of the perceived obstacles in the implementation of subtitling is the general conception that subtitling requires a high level of literacy in order to be used successfully. However, practice and research seem to contradict this commonly held belief and numerous studies world-wide have indicated that subtitling is in fact a powerful tool for **raising standards of literacy** through the teaching of reading in developing as well as developed communities (Cf. Peters, 1979; Koskinen *et al.*, 1985; Koskinen *et al.*, 1986; Bean, 1989; Milone, 1993; Kothari, 1999; Linebager 2001; Gottlieb, 2004a: 87). Other benefits of subtitling include **improved second-language acquisition** (Cf. Holobow *et al.*, 1984; Hanson & Padden, 1989; Smith, 1990; Spanos & Smith, 1990; Neuman & Koskinen, 1992; Neuman & Koskinen, 1993; and Borrás & Lafayette, 1994; Van de Poel & d'Ydewalle, 2001; Gottlieb, 2004a: 87), and being a cost-effective way to address the question of **language rights for marginalised groups**, including previously politically marginalised groups (Kilborn, 1993; Gottlieb, 1996:281-2; Gottlieb, 2004a: 87), as well as socially

marginalised groups such as persons with impaired hearing (Kruger *et al.*, 2000; DTN 1999; Nicotera, 1999).

All these issues are extremely important in South Africa. With an illiteracy rate of 18 million out of a total of 45 million (MacFarlane, 2000; Williams, 2002; MacFarlane, 2005), this aspect of social development cannot be ignored. Illiteracy not only affects individuals, but the nation as a whole as illiterate nations are less healthy, productive and wealthy than nations with a higher literacy rate (PBS, 2002). Without intervention to improve literacy skills, the illiterate are likely to remain economically disempowered and locked in a cycle of poverty. Literacy also has major implications for issues that are central to the very notion of democracy, such as the dissemination of information for the holding of free and fair elections, and other important matters, such as AIDS education and language rights.

The facilitation of second or third language acquisition is another very important issue in the multilingual setup in South Africa. In a country with eleven official languages, with the rights of these languages enshrined in the Constitution (RSA, 1994:6), it is important for citizens to be able to communicate with each other across language barriers, even if the languages are not from the same language group or language family. At present, the unofficial consensus seems to be that English is the *lingua franca* in South Africa, in spite of provision for the equality of languages in the Constitution. Gottlieb (2004a: 90) states that subtitling between non-English language pairs is imperative "to counteract the dominance of English and to facilitate multilingualism". Research has indicated that second and third language speakers of English typically overestimate their proficiency in this language, resulting in a situation where only 22% of the speakers who consider themselves to be functionally proficient in English, can be classified thus (based on a PANSALB sociolinguistic survey; PANSALB, 2000). If subtitling is indeed an effective way of improving second language acquisition, it would seem that subtitling may benefit all South African languages.

Along with improved literacy and the acquisition of a second or third language, the implementation of language rights is an issue than can be addressed by means of subtitling. Much research has been done on the link between political agendas and language policy, including the suppression or non-implementation of language rights and the way this can be redressed by subtitling and dubbing (Kilborn, 1993; Hassanpour 1999a, 1999b). Examples of the disparity in the treatment of languages in South Africa abound in both the public and private sector. The language distribution across the three channels of the SABC is a clear example of this. In spite

of its mandate as public broadcaster and its official language policy, the research project on subtitling in South Africa has revealed that as much as 75% of prime time television is broadcast in English (Kruger *et al.*, 2000:154). This is an obvious violation of the language rights of all language groups (excluding English), as English is in fact one of the languages with the smallest number of mother-tongue speakers in the country. This view is supported by the CEO of PANSALB, Prof. Cynthia Marivate, who states that “the SABC practice of allowing English to dominate on our television screens is unconstitutional and obviously marginalises the previously marginalised languages further” (Marivate, 2002:3). According to Gottlieb (2004a: 95) “offering subtitles in indigenous languages will improve the status of so-called lesser used languages and make program production in these languages more viable”.

The reason for the dominance of English, especially in the public broadcaster, would appear to be mainly economic in nature. Given the cost of buying a programme from an anglophone country compared to producing one locally, it makes economic sense rather to buy programmes. Therefore, imported English programmes are here to stay as they guarantee a modicum of entertainment and information at an affordable rate, but they need not be monolingual. The situation can be redressed, or at least improved, through the use of various means of audio-visual language transfer. Ivarsson and Carroll (1998:33) say, concerning the choice facing broadcasters, that “making their own programmes is exorbitantly costly; buying and dubbing programmes from abroad is less expensive, and subtitling foreign material is the cheapest by far”.

The two most popular means of audio-visual language transfer in developed countries are dubbing and subtitling. Dubbing refers to the remaking of a soundtrack in a different language, using local actors to enact it. The new soundtrack is normally synchronised to a greater or lesser extent with the visuals – so-called lip-sync. The second means of audio-visual language transfer is subtitling. Subtitling is the use of on-screen captions to convey the dialogue, narration or other linguistic (and certain non-linguistic semiotic) elements of the programme. The original soundtrack is still available to the viewer, but the captions form an additional support, an over-layer, either in the same language as the soundtrack (intralingual or same-language subtitling, such as for viewers with impaired hearing), or in a different language (interlingual subtitling, for example for viewers who do not understand the original language of the soundtrack).

Smaller countries seem to prefer subtitling as means of audio-visual language transfer, apparently because it costs only roughly a tenth to a fifteenth of what

dubbing costs (Dries, 1995:1). This would be a powerful argument in favour of subtitling in a developing country such as South Africa, especially since neither of these forms of audio-visual language transfer has as yet been firmly established here (with the possible exception of dubbing into Afrikaans which was used extensively in the past but which has since dwindled away). It would therefore seem that subtitling is the logical choice to address matters of language rights, especially when financial considerations are taken into account.

Based on the benefits that subtitling has been shown to have in other countries, there is a case to be made for the implementation of subtitling in South Africa to address issues such as language rights (including that of politically and socially marginalised groups), literacy and second or third language acquisition. The argument is further strengthened by the fact that subtitling is by far the most economic way of audio-visual language transfer.

However, a major obstacle in the way of the implementation of subtitling in South Africa is the lack of trained subtitlers in the country. In the absence of properly trained subtitlers, it is impossible to recommend the large-scale implementation of subtitling to address socio-linguistic issues. The quality and relevance of the training presented to prospective subtitlers in South Africa, is likely to determine the success with which they are able to address issues such as limited access to information, illiteracy, and second-language acquisition.

0.1.2 General and specific aims of the study

Within this context, the overarching aim of this study is to propose a programme for the tertiary training of subtitlers in South Africa based on the unique socio-linguistic environment in the country and aimed at addressing issues arising from this through the use of subtitling as a means of audiovisual language transfer (AVT).

In order to achieve this general aim, the study will firstly define the needs of domestic user groups that are likely to benefit from the large-scale implementation of subtitling by proposing a set of user-based parameters for the successful implementation of subtitling in South Africa. This includes groups with limited access to information because of impaired hearing, illiterate viewers, and non-L₁ speakers of English.

Following the analysis of domestic user needs, the study will provide an outline of existing subtitler training programmes. This outline will focus on subtitler training, predominantly from developed countries, and will identify core aspects that shape these courses. This will be used as basis for an evaluation of the benefits and

challenges that the implementation similar programmes would hold for South Africa as a developing country

In view of conclusions reached in the comparative study above, the study will then propose a curriculum outline for the training of subtitlers in South Africa. This curriculum outline is shaped by the user-based parameters for subtitling in South Africa in the first part of the study and the core elements from existing subtitler training programmes. The general and specific outcomes attempt to adapt internationally accepted best practice in subtitler training to the unique needs of the South African socio-linguistic and language-political context.

In an attempt to move beyond a documented shortcoming in international subtitling literature, the study will propose a semiotic model for subtitling that could be used in the training of subtitlers in South Africa. Although most existing subtitling courses and literature single out the ability to condense as a vital skill, they often do so in a reductionist way by omitting to link it to semiotic equivalence. It is postulated that the model proposed in this study could lead to the production of qualified subtitles by addressing an aspect of subtitling theory that has largely been neglected until now. In this way, the final objective of the study is to move a South African course for the training of subtitlers beyond the theoretical constraints imposed by existing subtitling courses that do not offer a comprehensive semiotic description of the subtitling process.

The next section will provide a brief outline of the field of study and the approach taken.

0.2 Field of study, literature overview and explanation of approach.

The first part of the study (chapters 1 to 3) is functionalist in its approach. Essentially, it is concerned with what is required in order for subtitling to be successful in South Africa, what works for subtitler training in other countries, and how this could be adapted to the South African situation. The research questions answered in these chapters are:

- 0.2.1 What constitutes the user-based parameters for the training of subtitlers in South Africa?
- 0.2.2 What are the fundamental elements of existing subtitler training programmes, including an evaluation of the benefits and challenges that the implementation of these hold for South Africa as a developing country?

0.2.3 What are the characteristics of a curriculum outline for the training of subtitlers in South Africa look like against the background of user-based parameters and existing training programmes?

The answers to these questions lie not in one discreet field, but can be found across a number of inter-related disciplines, namely socio-linguistics, subtitling, translation studies, education and Deaf studies, and as such the study will refer to literature and research from all of these fields.

Subtitling is a fairly new discipline, having its origins in translation studies. In a sense, subtitling theory builds on translation theory for solutions to translation-related problems. This is also reflected in the fact that subtitler training is often presented under the auspices of departments of translation studies. Aspects of subtitling that are unique to subtitling, e.g. formal aspects, cueing, and condensing are addressed in literature belonging to the discipline of subtitling.¹

Inasmuch as this study deals with subtitling as an independent discipline, as well as translation aspects of interlingual subtitling, it draws on literature from both these fields. The study also refers to socio-linguistic research in the South African context, in particular to research projects commissioned by the Pan South African Language Board (PANSALB, 2000; PANSALB, 2001).

The approach in the last part of the study is philosophically descriptive, as opposed to the more functionalist approach in the first part. In recent times, there has been a growing awareness among subtitling theorists that rules and regulations are not enough to ensure the production of quality subtitles, but that theoretically sound and comprehensive models are needed. Aline Remael (2004: 105) writes that

I would posit that the lamentable state of subtitling in Europe, say, a decade ago, may have warranted the call for standardization, law, order and clarity that now dominates [subtitling] textbooks. [However] a greater focus on film genre would help reduce subtitling's homogenizing trend [...]

Remael postulates dialogue analysis as a solution to the problem, while Yves Gambier (2004: 169) advocates a semiotic approach to the subtitling process, stating that film subtitling part draws on a collection of semiotics systems. The objective for the last part of the study was formulated before the publication of these articles, but borne out of the same need for theoretical model to ensure the creation of qualified subtitles:

¹ Henrik Gottlieb's bibliography of subtitling (2000) provides an overview of subtitling literature over a period of 75 years.

0.2.4 What would a model for the balancing of equivalence and condensing in subtitling look like?

Although equivalence and condensing are both seen as vital components of subtitling, only condensing is actively taught, inadvertently at the expense of equivalence. The model proposed in this section is aimed at the production of qualified subtitles as part of a South African course for the training of subtitlers.. However, inasmuch as it addresses a shortcoming in international subtitling theory, it could also contribute to the global discussion of subtitling practice. This part of the study draws extensively on the philosophical descriptive translation theory of Dinda Gorlée (1994) and the way in which she uses the Interpretative Semiotics of Charles S. Peirce (1839-1914) to develop a model for equivalence in translation. Based on this, a subtitling model is proposed for approaching the problem of equivalence and condensing in subtitling from a semiotic point of view. The chapter also mentions numerous other works from the field of semiotics to strengthen the case for a semiotic approach to this problem.

0.3 Breakdown of sources, methods and procedures regarding the investigation.

As explained in the previous section, the study relies on literature and research from a number of different fields. This information stems from subtitling and translation research and philosophy abroad, as well as socio-linguistic research in South Africa such as the PANSALB commissioned research project into subtitling in South Africa in which the author participated. Local and international research is integrated into an argument that addresses the question of parameters for the tertiary training of subtitlers in South Africa. Research methods include extensive literature study, research visits to various international subtitler training institutions, observation, interviews, analysis, synthesis, critical thinking, and philosophical reflection. In the words of one of the examiners of the study

what emerges is a study based on experience and not merely on a regurgitation of secondary interpretation. In other words, the fact that the sources are current and based on fact and sound theory puts this study in the realm of practicality and practicability.

Over the course of the past four years, the researcher has visited three well-known international subtitler training organisations. This includes an extended five-month visit to Denmark and participation in the first semester of the course in Audiovisual Translation (subtitling) at the University of Copenhagen. It also includes visits to the

subtitling unit of SBS and the Australian Caption Centre (AUSCAP) in Sydney. The researcher has also attended lectures by and conducted interviews with a subtitling trainer from ISTI in Brussels.

The format chosen for reporting on research is a series of articles published in peer-reviewed academic journals. The rationale for selecting this format to report on the study is multifaceted. Through publication in academic journals it was possible to gain greater exposure and prominence for an aspect of translation studies which has until now largely been overlooked in South Africa. Articles have also proved useful in initiating and contributing to discussion about the role of subtitling as a means of addressing socio-linguistic and language-political issues within the country. Lastly, the peer review nature of journals selected for publication acted as an external control for the standard of research. In spite of these advantages, there are also drawbacks to this particular form of reporting. In the first place, articles are limited in terms of volume, and the arguments represented therefore needed to be distilled and in order to comply with journal prescriptions for article length. Paradoxically, however, reviewers also required articles to provide context for readers who may not be familiar with earlier articles, thereby necessitating some repetition in the form of summaries of conclusions reached in these.

One of the chapters (chapter 4) has been significantly re-worked within the context of the thesis since it was first published in *Perspectives: Studies in Translatology* (2001). The article versions of chapter 1 and chapter 2 have been accepted for publication in *Southern African Linguistics and Applied Language Studies* (SALALS), and chapter 3 has been submitted for publication in this journal later this year. Although the chapters were first written as distinct article units, the individual bibliographies for each article have been replaced by a composite bibliography.

Research for this study has also consistently been influenced by the researcher's involvement in PANSALB-commissioned research on subtitling and subtitler training in South Africa. The chapter on user-based parameters for the training of subtitlers formed a significant part of the PANSALB research report, and the researcher was also a co-author of the executive summary. This executive summary is attached as Addendum A.

The last aspect that has impacted significantly on the research for this study, was the researcher's involvement in the first and second subtitling workshops at the Vaal Triangle Campus of North-West University. The researcher was instrumental in the selection of language practitioners from different language groups in South Africa to

act as participants. Participation in a forum discussing subtitling phenomena unique to the South African context instilled a sense of the singularity of South Africa as a setting for subtitling and the need to find tailor-made solutions to these issues. Lastly, the two workshops presented an opportunity to observe two experienced subtitler trainers from developed countries, Henrik Gottlieb from the University of Copenhagen and Corinne Imhauser from ISTI (Brussels), in action. In addition to this, it provided an opportunity to engage in discussions on issues that arose from the developed country/developing country dialectic.

As can be seen from the above, the research is the product of various research methods over a total of four years. The study has attempted to analyse documented research, own research and observations and to synthesise these into one coherent argument that addresses the tertiary training of subtitlers in South Africa, in spite of the self-contained nature of the individual article chapters.

The last section of this introductory chapter will briefly provide definitions of terms that may need clarification for the study.

0.4 Definitions of terms.

0.4.1 Captioning

This term is used in the United States of America and Australia for intralingual (same-language) subtitling, primarily aimed at a hearing-impaired viewer group in the form of closed captioning (in other words requiring a decoder). However, the present study consistently uses the term subtitling, in keeping with the European tradition, to denote the use of on-screen subtitles as a written representation for elements of the soundtrack, such as dialogue and sound effects, and includes both open and closed subtitling. The only exception to this is when the word "caption" (or any of its derivatives) occurs in quotations from primary sources, in which case it has been retained.

0.4.2 Developed country

A country with a strong economy where inhabitants are generally seen to have a comfortable standard of living with access to essential services, such as education.

0.4.3 Developing country

A country with an economy predominantly based on agriculture where many inhabitants lead a subsistence existence and do not have general access to basic services, such as education.

4.4.4 Impaired hearing

Impaired hearing in this report refers to both total and partial hearing-loss. The terms “deafness” and “hard of hearing” are used when they occur in quotations from primary sources.

0.4.5 Interlingual subtitling

Subtitling that translates the source text dialogue from one language to a target text subtitle in a different language.

0.4.6 Intralingual subtitling

Subtitling which renders the dialogue in a subtitle in the same language as the source text, albeit not verbatim.

0.4.7 Literacy

The ability to look at and comprehend the meaning of (written or printed matter) by interpreting the characters or symbols of which it is composed (Concise Oxford Dictionary, 1998).

An earlier version of this chapter was presented as a seminar
at MARCS Auditory Laboratories,
University of Western Sydney on 21 October 2002.
The article version of this chapter
has been accepted for publication under the same title
in *Southern African Linguistics and Applied Language Studies*
and was co-authored by Dr Jan-Louis Kruger.
SALALS guidelines for authors
are included as Addendum B.

CHAPTER 1: USER-BASED PARAMETERS FOR THE TRAINING OF SUBTITLERS IN SOUTH AFRICA

1.1 Introduction and problem statement

This chapter attempts to define a set of parameters for the training of subtitlers in South Africa to meet the diverse needs of the various potential user groups. In order to arrive at a description of these parameters, the chapter first defines the various groups in terms of their distinct needs. The main user groups that are identified in the chapter are users with impaired hearing (including users with pre-lingual deafness, users with post-lingual deafness and viewers with partially impaired hearing), illiterate users, and literate non-L₁ users. The needs description of these groups is then used to formulate user-based parameters for the training of subtitlers in South Africa. These parameters centre on reading speed, vocabulary, access to non-linguistic audio elements, and knowledge of the source language. The chapter further shows that, although there are overlaps in terms of the needs of different user groups, the groups are sufficiently unique to make any combination of groups for the purpose of subtitles highly problematic. Nevertheless, the common ground that does exist should be exploited to ensure that subtitling in South Africa will be done optimally to ensure maximum benefit to target groups in the way that specific language-related problems are addressed.

Ivarsson and Carroll (1998:1) state that subtitling must be well executed if it is to be accepted by viewers. They further say that "many people, including both broadcasters and self-taught subtitlers, do not seem to have much of an idea of what it takes to produce good subtitles. In particular, the training of subtitlers lags far behind demand for this particular language transfer service" (Ivarsson & Carroll, 1998:2).

A quick overview of subtitling across the three television channels of the South African Broadcasting Corporation (SABC) reveals that there is very little consistency in the way that subtitling is done. The inconsistency is particularly visible in the variety and size of fonts used, number of characters per line, positioning and display of subtitles, reading speed, proportion of the programme that is subtitled, and lack of a coherent model for subtitling. There seems to be no central core of parameters for subtitling, often resulting in subtitles that are neither here nor there, and with none of the potential viewer groups adequately served by what is presented. As Ivarsson and Carroll point out in the above passage, an uneven quality of subtitling is directly linked to insufficient or non-existent training of subtitlers. This is of particular concern to the South African situation where subtitling is still in its infancy.

In a report on subtitling in South Africa, Kruger and Kruger (2001:5) state that subtitling is underutilised, although it has the potential to address language-related problems such as inaccessibility of information and illiteracy, and that it could be used in the implementation of language rights and the promotion of multilingualism. One of the main reasons for the underutilisation of subtitling is the lack of adequate training for subtitlers and the resulting shortage of qualified practitioners (Kruger & Kruger, 2001:5).

However, the fact that subtitling has not yet been introduced on a large scale in South Africa, enables us to learn from the experience of other countries and to avoid making the same mistakes. In the US, for instance,

[I]n those early days of captioning, the people involved were too busy trying to provide a service to do much research on captioning techniques. In general, whenever captioners faced a caption editing problem, they would just talk about it among themselves, reach an agreement, and their decision would become captioning policy. For their part, deaf and hard of hearing people were so delighted to have captioned television that they would literally accept anything thrown on the screen. For years after captioned television became available, deaf and hard of hearing people were very reluctant to criticize the service.

In the last decade, as captioning has become more wide-spread, this situation has begun to change. Both caption providers and caption viewers are taking a more careful look at captioning techniques (Jensema & Burch, 1999:6).

The implication of this for the South African situation is that one needs to take a careful look at the needs of potential subtitle user groups before any training programmes can be developed.

1.1.1 Differing needs of different subtitle user groups

The answer to the question of who the potential South African subtitle user groups are, lies in the applications of this form of language transfer in addressing specific problems or needs.²

The first language-related problem that can be addressed through subtitling is **inaccessibility of information**. One of the main benefits of subtitling is that it allows access to information (transmitted via the audio channel) to viewers who would otherwise have been excluded. This information typically includes spoken language

² See also Gottlieb (2004) in which he highlights the benefits of subtitling, as well point to the danger of potentially contributing to the entrenchment of English as global language to the detriment of other languages, if done indiscriminately.

(for example, dialogue, monologue, and commentary), music and other sound effects (for example, gunshots, thunder, and car crashes), collectively known as the soundtrack.

This audio information may be inaccessible to viewers in varying degrees and for a variety of reasons. Physical disabilities such as total or partial hearing-loss may limit, or altogether prevent, access to audio information broadcast on television. Viewers with these disabilities rely on sight, or people who can interpret the audio content for them, to understand the broadcast.

Another factor that may restrict access to the audio channel in television broadcasts is the use of a language other than the first language (L_1) of the viewer. In South Africa, with its eleven official languages, none of which is spoken by all South Africans, this situation would occur during any broadcast. No matter what language the broadcast is in, it will always be inaccessible to viewers who do not speak that particular official language. At present, the SABC mainly provides for those viewers who understand English, subtitling only **into English** for programmes that contain dialogue in one of the ten other official languages. In other words, the premise is that all South Africans understand English and that any language other than English has to be rendered into English in order to make it accessible to all. The error of assumption here becomes clear when one considers that only 22% of all (non-English mother-tongue) respondents in South Africa can get a full grasp of the content of any speech or statement delivered in English (PANSALB, 2001). Based on the 2001 census, this means that roughly 32 million people are to some degree excluded when only English is used.

In most of the above cases, limited access to the audio could be improved, and in some cases eradicated, through the use of subtitles. Research has shown that subtitles are an effective way of making audio information accessible to those with hearing-impairment (cf. DTN, 1999), while at the same time improving comprehension (cf. Lewis & Jackson, 2001; and Bird & Williams, 2002). Nugent (1983) concludes that subtitles are successful in raising the levels of comprehension in both hearing and hearing-impaired students. Furthermore, interlingual subtitles are used to make non- L_1 audio information available to viewers.

The second language-related problem in South Africa that could be addressed through subtitling, is **illiteracy**. The adult illiteracy rate in the country is 18 million out of a total of 45 million (MacFarlane, 2000; Williams, 2002). Approximately one in every two adults is functionally illiterate, in other words, lack "the literacy necessary

for coping with most jobs and daily situations” (Concise Oxford Dictionary, 1998). Illiteracy not only affects individuals, but the nation as a whole as illiterate nations are less healthy, productive and wealthy than nations with a higher literacy rate (PBS, 2002). Without intervention to improve literacy skills, the illiterate are likely to remain economically disempowered and locked in a cycle of poverty.

Subtitling is a form of intervention that has been tested extensively in the teaching of reading in the United States, and research indicates that it could be used with great success for the teaching of reading to both hearing and hearing-impaired adults and children (cf. Peters, 1979; Koskinen *et al.*, 1985; Koskinen *et al.*, 1986; Bean, 1989; Milone, 1993; and Linebager 2001). Research in India, a developing country like South Africa, indicates that subtitled television is a successful means of raising levels of literacy among adults in remote areas (Kothari, 1998).

The third language-related issue that can be addressed through subtitling is the issue of **multilingualism**.³ The home-language distribution in South Africa (derived from the 2001 official census) bears testimony to the fact that the country truly has a multilingual and multicultural character that should be taken into account in determining the needs of the different user groups:

Table 1.1 Language distribution in South Africa according to the 2001 Census

Language	Number of speakers	Percentage
IsiZulu	10 677 305	23.8%
IsiXhosa	7 907 153	17.6%
Afrikaans	5 983 426	13.3%
Sepedi/Northern Sotho	4 208 980	9.4%
Setswana	3 677 016	8.2%
English	3 673 203	8.2%
Sesotho	3 555 186	7.9%
Xitsonga	1 992 207	4.4%
SiSwati	1 194 430	2.7%
Tshivenda	1 021 757	2.3%
IsiNdebele	711 821	1.6%
Other	217 293	0.5%
TOTAL	44 819 778	100%

(Statistics South Africa, 2003:15)

In a country with more than one official language, language rights are inextricably linked to multilingualism. It is only possible to exercise the right to use a first language in communication with speakers of other languages if they are able and

³ See also MAG (2002) for an in-depth discussion on why and how the SABC should promote language diversity in public broadcasting.

prepared to speak a language other than their first language. Multilingualism can be defined as

the dynamic process, which empowers the speakers of different languages to convey messages in a language or languages of their own choice, as well as displaying sensitivity for the need of different communities to express themselves in their own vernacular (Anon, 2002:2,3).

By being able to speak more than one language, it is possible to communicate with a wider range of people and to have access to a wider range of activities. In the words of the old Afrikaans adage: "Soveel tale as ek kan, soveel male is ek man" (the more languages I speak, the more times I am a man).

According to the Pan South African Language Board (PANSALB), monolingualism and the denial of language rights have been used in the African context to disempower, especially during the time of colonialism, and also to exclude people from economic, political and social participation (PANSALB, 1998). In South Africa with its eleven official languages, multilingualism is seen as a way to accommodate the language rights of the speakers of all official languages. PANSALB strives for the promotion of multilingualism

in order to enable South Africans to free themselves from all forms of linguistic discrimination, domination and division; and to enable them to exercise appropriate linguistic choices for their own wellbeing, as well as for national development (PANSALB, 1998).

Over a period of 20 years, research in the United States and Europe has shown that subtitling is an effective means to facilitate second language acquisition in both hearing and hearing-impaired subjects (cf. Van de Poel & d'Ydewalle, 2001; Holobow *et al.*, 1984; Hanson & Padden, 1989; Smith, 1990; Spanos & Smith, 1990; Neuman & Koskinen, 1992; Neuman & Koskinen, 1993; and Borrás & Lafayette, 1994). Some of the benefits of subtitling for second language acquisition are that it improves comprehension and oral performance, facilitates incidental learning of new words, and is a great motivator.

Applications of subtitling, namely access to information, improvement of literacy, and the promotion of multilingualism, may be associated with all forms of subtitling, but more often than not, it is associated with a specific form of subtitling, either interlingual or intralingual, as the next section will point out.

1.1.2 Intralingual and interlingual subtitling

Subtitling can be either intralingual or interlingual. Intralingual subtitling involves creating subtitles in the same language as the soundtrack, for example, when English dialogue in the Afrikaans soap opera, *7de Laan*, is subtitled in English. Intralingual subtitling is also sometimes referred to as Same Language Subtitling (SLS) or vertical subtitling (Gottlieb, 2004b). The purpose of intralingual subtitling is normally to make audio information accessible to persons with impaired hearing, to provide reading practice, or to improve comprehension by speakers who have a limited proficiency in the source language.

Interlingual subtitling, also known as diagonal subtitling (Gottlieb, 2004b), involves the translation of audio information from one language to another, for example, English subtitles for Afrikaans dialogue in *7de Laan*. The primary aim of interlingual subtitling is to provide access to information in a language that is not accessible to the viewer. As part of this, interlingual subtitling is used in second and foreign language teaching to improve comprehension and learning. Although it is not the primary aim of interlingual subtitles, they also make information available to viewers with impaired hearing.

There is a need for both intralingual and interlingual subtitles in South Africa. The type of subtitling to be used will be dictated by the needs of the primary subtitle user group in a given situation.

1.1.3 Aim and objectives

The aim of this chapter is to define a central core of parameters for the training of subtitlers in South Africa to meet the requirements of the various user groups. In order to ensure that South Africa gets off on the right foot with subtitler training, the first objective is to describe the needs of potential subtitle user groups. The experience of other subtitling countries will be most useful in this regard, as their research and viewer feedback provide South Africa with a greater understanding of the needs of its own potential viewer groups. The needs description will be used to formulate user-based parameters for the training of subtitlers in South Africa. The ultimate goal of this exercise is to ensure that subtitling is done optimally to ensure maximum benefit to target groups in the way that specific language-related problems are addressed.

1.2 Needs of potential subtitle user groups in South Africa

1.2.1 Users with impaired hearing

The first potential group of subtitle users are viewers who are deaf or otherwise hearing-impaired, as they are unable to access the soundtrack on television. In spite of the fact that no systematic subtitling was used at the time of the survey on subtitling in South Africa conducted by Kruger *et al.* (2000), more than 40% of deaf respondents in that survey indicated that they watch more than 5 hours of television per week (24% watched more than 10 hours per week), and all respondents indicated that they have access to television in their own homes. This constitutes a significant use of public service television.

There are two main types of deafness, namely pre-lingual deafness (those who have been born deaf and never acquired language in a natural way), and post-lingual deafness (those who have become deaf after acquiring language). The latter includes acquired hearing-loss due to illness, accident or old age and this viewer group is significantly bigger than the first group. In Kruger *et al.* (2000:64), a random selection of participants from viewers with impaired hearing resulted in a sample with between three and four times more persons with post-lingual than pre-lingual deafness. This is consistent with figures in other countries. Although both groups will benefit from subtitles, their requirements will be different because the first group is in the process of acquiring a basic proficiency in language that they have no aural exposure to, while the second group has already acquired a certain level of language proficiency.

According to De Linde and Kay (1999:11), people with pre-lingual deafness

are at a disadvantage on two accounts; not only are their reading levels lower than average but their breadth of knowledge is also restricted by a limited access to information throughout their education.

[...]

In contrast, there is no evidence to suggest that the reading ability of people who have acquired hearing loss is adversely affected. This means that there is an unusually large range of reading abilities among deaf and hearing-impaired viewers [...].

The primary need shared by all viewers in this group is access to information conveyed via the audio channel. In the case of television, this includes dialogue and other linguistic information such as narration or commentary, as well as sound effects

and music. Although lip-reading is possible for dialogue when the speaker is facing the camera, speakers that face away from the camera, off-screen narrators and sound effects cannot be “read” in this way. This inaccessibility of information presented via the audio channel could at best lead to an incomplete understanding or misunderstanding of the programme (Lewis & Jackson, 2001:45), or to a total inability to understand the programme. By providing a written representation of linguistic (and non-linguistic) elements of the audio channel, subtitles make this information accessible to those viewers who are deaf or hearing-impaired.⁴

The way in which subtitling is done should take into account the particular needs of people with pre-lingual and post-lingual deafness. According to Lewis and Jackson (2001:45)

[I]t is assumed that if an individual is not consistently exposed to language in a variety of contexts (for example, interpersonal communication, storytelling, reading, writing), he or she will not fully develop the skills with language that result in competence. Language abilities increase with use and through interactions with those who have more sophisticated language skills; unfortunately, for many deaf children, the variety of such learning interactions is often not readily available.

Therefore, subtitling for viewers with post-lingual deafness will normally be aimed at a target viewer group with more sophisticated language skills than subtitling for a viewer group that is predominantly pre-lingually deaf.

1.2.1.1 Users with pre-lingual deafness

As a result of the lack of or limited exposure to natural language, viewers with pre-lingual deafness are likely to have a more limited vocabulary compared to viewers with post-lingual deafness. Lower reading and natural language proficiency levels among viewers with pre-lingual deafness suggest that subtitling for this group should be done at a lower rate, some even recommending the use of simplified language structures (Braverman & Hertzog, 1980). However, the use of overly simplified language structures has since been disputed (Jensema *et al.*, 1996:284-5) as this is considered to be over-editing which complicates the task of the reader by requiring a higher degree of inference, although the reading task itself has been simplified.

⁴ While making audio information available in visual format, subtitles are also successful in raising literacy levels, language proficiency and comprehension in deaf and hearing-impaired viewers (cf. Nugent, 1983; Koskinen *et al.*, 1986; Hanson & Padden, 1989; and Lewis & Jackson, 2001).

In order to address the subtitling needs of viewers with pre-lingual deafness, the following aspects should be taken into consideration:

- The audio content should be presented in a written form at a **reading rate** that is optimal for this group.
- Preference should be given to words that are likely to form part of their *vocabulary*.
- Subtitles should reflect the presence of *non-linguistic elements* on the soundtrack, for example, music or other sound effects.
- *Language structures* should not be over-edited, as this increases the level of inferential knowledge required from the viewer.

1.2.1.2 Users with post-lingual deafness and partially impaired hearing

Although the needs of viewers with post-lingual deafness and viewers with impaired hearing are similar to that of viewers with pre-lingual deafness insofar as neither group has unrestricted access to information presented via the audio channel, their needs are also quite different since this viewer group has acquired language prior to their hearing-loss. These viewers are likely to have a vocabulary and reading speed that is equivalent to that of the hearing population since they would have acquired language in the same way as most other people. This is the group which, according to Jensema and Burch (1999:6), wants verbatim subtitling. The reason for this is that they would like to “see every word hearing people hear on television”. Research by Jensema and Burch indicates that although the average subtitling speed in the US is 141 words per minute (wpm), viewers with impaired hearing can read up to 220 wpm for short periods of time, without any significant loss of comprehension.

In order to address the subtitling needs of viewers with post-lingual deafness, the following aspects should be taken into consideration:

- The audio content should be presented in a written form at a **reading rate** which is appropriate for the variety of reading proficiencies in this group. To limit frustration in the more literate sector of this group, this may at times call for an inflated reading rate.
- Subtitles should reflect the presence of **important non-linguistic elements** on the soundtrack.
- *Language structures* need not be edited down.

- The use of a simplified **vocabulary** is not required, as these viewers are already proficient in natural language.

1.2.2 Hearing user groups

The needs of hearing user groups differ from those of viewers with pre-lingual deafness as the former do not face the same challenges in acquiring language as the latter. For hearing people, language acquisition is a natural process which consists of language modelled to the child, attempts by the child to use language, possible corrections to these efforts, and the endless repetition of the process. The child acquires most of the basic structures and vocabulary of spoken language early on in the first two years of her or his life, while the basics of reading and writing are only taught during the first few years of schooling. This is also the point where our next two potential user groups part company: both groups will learn to speak the language, but the illiterate will never master the basics of reading and writing.

1.2.2.1 Illiterate users

Being illiterate means that people are excluded from any activity that involves reading or writing. Although many illiterate persons learn to recognise their name, and even to read prices, this does not empower them to recognise the same graphemes in a different context. If reading is defined as to “look at and comprehend the meaning of (written or printed matter) by interpreting the characters or symbols of which it is composed” (Concise Oxford Dictionary, 1998), it is clear that this “name-reading” is a phenomenon closer to the recognition and interpreting of a road sign than it is to reading.

In order to be able to read, the most important need of the illiterate is to learn how the building blocks of spoken language, phonemes, are represented in writing (graphemes). All languages use a finite number of phonemes or “distinct units of sound that distinguish one word from another” (Concise Oxford Dictionary, 1998). Since the illiterate person can already speak the language, they are likely to know most of the phonemes used in their particular language. In order to be able to read, they now need to link the phoneme to the grapheme. This is not always as straightforward as it may seem, and English is notoriously complex with its alternative ways of representing the same phoneme, for example, /f/ which can be written respectively as “f” or “ph”, or on the other hand, the same grapheme representing different phonemes, for example, “ou” which can be pronounced as /ʌ/ in “tough” or as /əʊ/ in “though”.

Research in developing and developed countries has shown that subtitling can be used effectively to teach reading and to improve literacy. The level of literacy (illiterate, neo-literate, semi-literate, literate) at which the specific subtitled programme is aimed, will determine the type of programme material selected, as well as the way in which subtitling is done. The study done by Kothari (1998) in India where subtitled film songs were used to teach and improve literacy without the assistance of a teacher, is an example of this. By using film songs, the researchers ensured that there was a one-to-one correlation between the lyrics of the soundtrack and the subtitles. The popularity of film songs in India means that people are already familiar with the words, and this makes a larger degree of prediction possible. According to Burke (1990:116), we understand the intended meaning of a text by making and testing predictions, and the more successful our prediction, the easier it is to read. Another result of the study in India is that the use of highly popular material was found to serve as a great motivator for people to watch the subtitled material (Kothari, 1998).

The following aspects should be taken into consideration when attempting to address the needs of illiterate viewers with regard to subtitling:

- Both the audio and the subtitles should preferably be in the **first language (L₁)** of the viewer (intralingual subtitling).
- There should be a high degree of **correlation** between the audio (phoneme) and the subtitle (grapheme).
- Sufficient **reading time** should be allowed.
- A core **vocabulary** should be used and fostered to facilitate prediction.

1.2.2.2 Literate non-L₁ users

Non-L₁ viewers are speakers whose first language is a language other than that of the television programme. In South Africa with its eleven official languages, anyone who watches a programme in a language other than their first language, is a non-L₁ viewer. These non-L₁ viewers may have varying degrees of proficiency in the language of the programme, ranging from none whatsoever to high, depending on their exposure to and training in the non-L₁ language. These viewers have already acquired at least one natural language, namely L₁. On a subconscious (and sometimes on a conscious) level they use rules to speak and write in L₁. They are familiar with the idea of language as governed by a set of rules, and know that there

is a "right" and a "wrong" way of phrasing something. However, these speakers need help to understand the audio of non-L₁ television programmes.

In order to understand the audio of the television programme, these non-L₁ viewers may require a translation of some or all linguistic elements, depending on their level of proficiency in the non-L₁ language.

Because of the lack of phoneme-grapheme correlation between audio and subtitle in interlingual subtitling, this type of subtitling is not suitable for the teaching of literacy. For the sake of this chapter, the potential user group for interlingual subtitling will be limited to non-L₁ viewers who are literate, and therefore able to access the information in the written translation.⁵

In order to address the needs of non-L₁ viewers with regard to subtitling, the following aspects should receive attention:

- A clear **translation** is required in a language in which these viewers are proficient and which is compatible with their cultural background. Translation should be sufficiently concise to be read in a short time, while at the same time remaining equivalent to the source text.
- The average **reading speed** and **vocabulary** in the L₁ of these viewers will be higher than that of people who are still in the process of acquiring language or literacy. The subtitling rate should therefore be adjusted according to the perceived user group.

1.3 User-based parameters for subtitling in South Africa

The needs analysis above has identified the most important needs of the various potential subtitle user groups. As a result of the heterogeneous nature of the potential user group, it is necessary to define parameters for subtitling in South Africa to ensure that the widest possible viewer base is serviced. Where choices are made that exclude a segment of the potential subtitle viewer base, it should be a conscious and justifiable decision. These parameters should form the basis of subtitler training in South Africa, as this will ultimately determine the success of the subtitles created.

Other countries (for example, the US, Australia, Belgium) deal with the problem of heterogeneous subtitle user groups by offering two different subtitling services: one for viewers with impaired hearing (intralingual subtitling), and one for non-L₁ speakers

⁵ Language transfer for illiterate viewers should be done through dubbing or re-narration (voice-over), although the first is expensive compared to subtitling (Ivarsson & Carroll, 1998:11), and the second is unsatisfactory because the whole soundtrack is re-narrated by one voice.

(interlingual subtitling). This undoubtedly has some advantages, although it does not solve all problems: by grouping together viewers who are hearing-impaired, they continue to have a group with a very big range of reading proficiency. This “split” in subtitling services has two significant negative aspects: it is a costly duplication of services, and it stigmatises intralingual subtitling as subtitling for the disabled, whereas hearing viewers also stand to benefit from this type of subtitling (reading practice).

The user-based parameters that will be discussed are: user-group profiles, reading rate, non-linguistic audio elements, language structures, phoneme-grapheme correlation between audio and subtitle, translation, and vocabulary.

1.3.1 User-group profiles

Prospective subtitlers should be familiar with the demography of the viewer base and the needs of the respective subtitle user groups. These needs will determine the type of programme material selected for subtitling, as well as the type and style of subtitling. It is important for production houses and broadcasters to realise that subtitling is not an add-on that will automatically increase viewer numbers. If done incorrectly, subtitling can detract from the quality of the viewing experience, instead of adding to it. Subtitling can serve any number of purposes, and these purposes will be determined by the needs of the potential viewer groups.⁶

Subtitler training with user needs as one of the key parameters will ensure that subtitles are tailored to the needs of viewers, instead of following a one-size-fits-all approach. The latter approach assumes that it is possible to serve the needs of subtitle user groups with widely differing needs adequately through a generic set of subtitles. However, the needs description above makes it clear that there are major differences between the groups in terms of reading speed, vocabulary, access to non-linguistic audio elements, and knowledge of the source language.

In the case of the Afrikaans soap opera, *7de Laan* (one of the few programmes on SABC that is currently fully subtitled), the SABC seemed ambiguous about who their target group was when the production house first introduced subtitling. Target groups cited for the introduction of subtitling were non-L₁ viewers, as well as viewers with impaired hearing. According to the SABC, they aimed to attract both “English and Afrikaans language speakers (many of whom can speak and understand English), while at the same time not wanting to alienate current viewers” (SABC, 2000).

⁶ An example of such a user-group profile is the *Survey of Television Caption Usage in Australia in November, 2000* (MARCS, 2002).

However, the subtitles are not suited to the needs of either group: the combination of intralingual and interlingual subtitles would seem to indicate that the titles are not exclusively aimed at non-L₁ viewers, and the absence of any reference to non-linguistic audio elements (sound effects) means the needs of hearing-impaired viewers are not fully served either.

One of the most important ways of staying in touch with user needs is viewer feedback. As most viewers will only contact the broadcaster when they are unhappy, subtitler training programmes should equip prospective subtitlers with the research tools required to obtain and interpret regular, reliable viewer feedback. This may take the form of a questionnaire, a brief telephone survey, or an internet forum on the website of a specific programme. If subtitlers are committed to viewer feedback, they will be in a better position to explain the importance of this to broadcasters and production houses.

Based on the needs of the various viewer groups, subtitlers should be able to advise broadcasters and production houses on

- the most successful way to subtitle for a specific viewer group, or a combination of viewer groups (for example those groups that have a lower reading speed and limited vocabulary), and identifying viewer groups whose needs will not be served by a specific set of subtitles;
- the type of material that is suitable for subtitling for a specific viewer group; and
- ways in which viewer feedback on subtitles can be obtained and integrated into existing viewer-need profiles.

1.3.2 Reading rate

The rate at which subtitles are read is not the same as a normal reading rate, since the viewer has to be allowed sufficient time to take in what is happening on-screen, thereby forming a complete picture of the sum of the semiotic signals.

In addition to this, the subtitler should realise that there is a wide range of reading rates in subtitling, and that these rates are determined by the material and the needs of viewer groups. In one study, subtitling rates ranged from 80 to 220 words per minute (wpm) with an average of 141 wpm (Jensema & Burch, 1999). The subtitler should know what subtitling rate is suitable for the average subtitle user in the target group, and be trained to work at different speeds. As a rule of thumb, greater condensing will be required to produce subtitles at a lower reading rate. Therefore,

subtitler training should pay particular attention to this skill. In order to be able to work at higher reading rates, the subtitler will have to be very creative with the shaping of titles to ensure that the maximum amount of text is presented in as readable a format as possible.

Subtitler training should provide ample opportunity for subtitling at different rates. Apart from familiarising prospective subtitlers with different types of programming that require different subtitling rates, the training should also include subtitling of the same material at varying reading rates with different user groups in mind.

The subtitler should ultimately be able to judge when the target reading rate suggested for a specific programme is unrealistic. In this case, the need for condensing will push the amount of information contained in the text below the critical level of what is required for comprehension.

In order to ensure that the wide range of reading rates in the potential subtitle user groups is catered for, subtitlers should be able to

- identify the appropriate reading speed for the target viewer group;
- subtitle the same material at varying speeds; and
- advise the broadcaster or production house on the suitability of material for subtitling to match the reading proficiency of the target group.

1.3.3 Non-linguistic audio elements

When subtitling is done for deaf and hearing-impaired viewers, the subtitles must represent essential non-linguistic audio elements in the text. The sound of thunder, or a gunshot in the distance, is an important semiotic element of the television programme. By not communicating this information to the viewer with impaired hearing, she or he is placed at a disadvantage. In a sense, the subtitles will have failed the viewer.

In the South African situation where we do not have the luxury of a separate subtitling service for viewers who are deaf and hearing-impaired (in the form of teletext subtitles that requires decoders), the subtitler will need to find a balance between providing this information and detracting from the pleasure of hearing viewers, or unduly complicating the reading task of beginner readers. The amount of non-linguistic audio information provided will depend on who the main target user group is.

Subtitled training should sensitise subtitlers to the needs of hearing-impaired viewers, thereby fostering greater deaf-awareness. This can be done by teaching the semiotics of film and television to subtitlers so that they are able to identify the individual semiotic elements that constitute a programme, and how best these could be made accessible through subtitles to a viewer group that is hearing-impaired.

Subtitled training should also encourage the use of standardised non-verbal cues for this type of information, such as a smoking gun for a gunshot. (This suggestion was made by Henrik Gottlieb in an introduction to subtitling workshop at the Vaal Triangle Campus of the University of Potchefstroom during July 2001.) Not only will this take up less screen space, it will be less intrusive for viewers who do not need this type of information, and it will not complicate the reading task of beginner readers. A brief message at the beginning of the programme to introduce the use of standardised cues may make subtitles more palatable to those viewers who do not need them. This notice should specify that the cues will be used for the benefit of viewers with impaired hearing, but that they are less intrusive than traditional verbal descriptions of these semiotic elements. This strategy could form part of a viewer education plan, but may also prove useful in bringing those who do not need subtitles on board by acknowledging their concerns.

For the viewers who are deaf or hearing-impaired,

- all non-linguistic audio elements should be subtitled; and
- to minimise intrusion, standardised non-verbal cues should be used.

1.3.4 Language structures

Because of the high degree of phoneme-grapheme correlation required in subtitling for improved literacy (see 1.3.5 below), programme material for this type of subtitling should be sufficiently simple so as not to require marked changes to the language structure of subtitles, as compared to that of audio.

Although Jensema and Burch (1999) advise against the over-editing of sentence structures, subtitle text has been shown to simplify language, especially where translation is involved (cf. Karamitroglou, 1998; Ivarsson & Carroll, 1998; and Rosa, 2000). Changes in sentence structure take place according to the rules of the languages involved (for example the positioning of adjectives or adverbs), as well as to make the text as clear as possible so that it does not require re-reading.

Language can be simplified by changing passive voice to active voice, omitting unnecessary repetitions, overlaps, hesitations, reformulations, interjections,

incomplete sentences, forms of address, and by concentrating on the meaning of the text (Rosa, 2000:214). However, the decision to simplify, if not well thought through, may complicate comprehension by increasing the level of inference required. This could be monitored by including the screening of subtitled material to test viewer groups on a regular basis in subtitler training, with special attention to reading behaviour and comprehension.

As far as language structures are concerned, subtitler training should

- equip prospective subtitlers to make linguistic choices, where possible, that will simplify reading, without unduly raising the level of inference; and
- encourage reflection on the nature and consequence of chosen language structures.

1.3.5 Phoneme-grapheme correlation between audio and subtitle

Although synchronicity in subtitling is a form of correlation, it is a much wider concept than phoneme-grapheme correlation. According to Gottlieb (1997:70-1), synchronicity is one of the main features of subtitling. He defines synchronicity as “the fact that the original film (at least its non-verbal part) and the translated dialogue are presented simultaneously”. As synchronicity is universal to the practice of subtitling and not a unique parameter of subtitling in South Africa, it will not be dealt with in any more detail.

However, decisions on the degree of phoneme-grapheme correlation between audio and subtitle are equally important. Phoneme-grapheme correlation is relevant in intralingual subtitling aimed at the teaching of reading and where the audio and subtitle are in the same language. This type of correlation refers to the concurrent representation of the graphemes (subtitle) and phonemes (audio). In the absence of a high degree of correlation between subtitle text and audio, the viewer will not be able to link the phonemes of the audio to their graphemes.

Subtitler training should instill in prospective subtitlers the ability to

- estimate the type and degree of correlation required between audio and subtitles; and
- present these elements concurrently with their occurrence on the audio.

1.3.6 Translation

The translation aspect of interlingual subtitling poses its own particular demands. The translation in the subtitle should aim to be a concise semiotic equivalent to the source

text. This means that the subtitle should have the same impact as the original within the limited screen space and time. Whereas semiotic equivalence is already very difficult to achieve in a normal translation, the added constraints of time and space imposed by subtitling mean that the translation skills of the interlingual subtitler will be put to the test even further. Semiotic equivalence and condensing will be discussed in more detail in chapter 4 where a subtitling model based on interpretative semiotics will be presented.

To create a subtitle with (near) semiotic equivalence requires a very high level of mastery of the languages involved. Ivarsson and Carroll (1998:59) argue that subtitlers should always work into their mother tongue, whereas the Australian multicultural broadcaster SBS prefers their subtitlers to work from their L₁. To compensate for possible non-L₁ proficiency in the target language, SBS has a system of subtitler editors (McLennan, 1995). However, there is general consensus that prospective subtitlers should have a very high degree of proficiency in both languages in which they intend to work.

Prospective subtitlers should also already dispose of basic translation skills and be familiar with the particular demands of translating between the languages in which they intend to work. Nevertheless, subtitler training should continue to hone translation skills within the context of subtitling. This aspect has special significance in the South African context where it is not uncommon to have fluctuations of up to 25% in the volume of the source and target texts, especially when the translation is done between English or Afrikaans and one of the Nguni languages.

Prospective subtitlers should be encouraged to present subtitling solutions for their particular language to those who work in other national languages to increase awareness of the problems involved in the creation of the subtitles. Forums like this will create a greater understanding of subtitling in South Africa, and could also lead to cross-fertilization and the exchange of possible solutions between mutually intelligible languages.

One example of such cross-fertilisation is the way in which colour is dealt with in the various South African languages. Whereas Germanic languages (including English and Afrikaans) divide the colour spectrum with distinct terms for blue and green, this is not true for all the other South African languages. However, it may be possible for language groups (for example, the Sotho or Nguni groups) to find solutions among themselves that can be used in more than one language of the particular group.

As far as translation is concerned, subtitler training should

- teach strategies for the achievement of semiotic equivalence between audio and subtitle;
- build on a high level of existing proficiency in both the target and source languages;
- sharpen translation skills in the context of subtitling; and
- foster an awareness of the special demands subtitling places on translation between various official languages in South Africa.

1.3.7 Vocabulary

The description of the needs of potential subtitle users indicates a wide range of potential vocabularies among the user groups. At the risk of generalising, it is assumed that children have a smaller vocabulary than adults, that viewers with pre-lingual deafness will have a smaller vocabulary than viewers with post-lingual deafness, and that L₁-speakers will have a bigger vocabulary than non-L₁ speakers. Although these generalisations may not always apply to specific individuals, skilled subtitlers who know their potential viewer group(s) will be able to create subtitles that will reach the average viewer in that group, using vocabulary that is familiar to them.

A study by Jensema *et al.* (1996:290) found that viewers in the US need a vocabulary of less than 500 words to understand most of the content of any television programme, in spite of the more than 500 000 words in the English language. If it is assumed that such a core vocabulary also exists for the official languages in South Africa, research should be conducted to identify and define it, and subtitler training should encourage the use thereof. On the other hand, the selective and limited use of words that are unknown to viewers could present them with an opportunity to extend their vocabulary, provided that the meaning is clear from the context.

Apart from encouraging the use of a core vocabulary for a particular language, subtitler training should also deal with the issue of synonyms and balance brevity with familiarity. Ivarsson and Carroll (1998:89) recommend that "if a subtitler is faced with a choice of two synonyms, it is better to choose the more common word if this can be done without doing an injustice to the spirit and style of the original".

Vocabulary choices are an essential part in the training of subtitlers. Subtitler training should strive to

- create an awareness of the range of vocabularies of the potential viewer groups; and

- equip subtitlers to select vocabulary that is appropriate for the subtitle user group(s).

1.3.8 Summary and integration of user-based parameters

The table below presents a brief summary of the user-based parameters for subtitling in South Africa according to the needs of each of the potential subtitle user groups. Although many of these parameters are similar to those in other countries, their contours differ in the South African subtitling landscape. These differences can be ascribed to the combination of language-political and socio-economic factors that are unique to South Africa.

Although the table is a simplification of the user-based parameters, it identifies similarities and differences between the main potential user groups. This may serve as a basis for subtitlers to determine which groups could possibly have their subtitling needs adequately served through a single set of subtitles under specific circumstances, and which groups will never be able to be grouped together (an example of the latter is literate non-L₁ viewers and illiterate L₁ viewers).

Table 1.2 User-based parameters for subtitling in South Africa

		Needs of potential subtitle user groups			
		Viewers with pre-lingual deafness	Viewers with post-lingual deafness	Illiterate viewers	Literate non-L ₁ viewers
Parameters	User-group profiles required	Yes	Yes	Yes	Yes
	Reading rate	Below 140 wpm	140 wpm and higher	Below 140 wpm	140 wpm and higher
	Non-linguistic audio elements	Yes	Yes	No	No
	Language structure edited down	Yes	No	No	Yes
	Phoneme-grapheme correlation	No	No	Yes	No
	Translation	Yes/No	Yes/No	No	Yes
	Limited vocabulary	Yes	No	Yes	No

From this table it should be clear that no two groups have exactly the same set of needs. Any possible combination, for example of the pre-lingually and the post-lingually deaf, will necessarily entail some form of compromise that should be considered carefully. In the case of the combination of the groups with pre-lingual and post-lingual deafness, the difference in terms of reading speed and vocabulary may seem to be less significant than the corresponding parameters, but the wide range of reading speeds would make a compromise very difficult to achieve.

It would therefore seem to be more meaningful to combine groups on the basis of reading rate and then to negotiate on aspects such as the inclusion of non-linguistic elements.

1.4 Conclusion

This chapter has provided a description of the needs of potential subtitle user groups in the South African context. The needs description indicates pronounced differences between some groups in terms of reading speed, vocabulary, access to non-linguistic audio elements, and knowledge of source language.

The broad implications of these parameters for subtitler training are the following:

- Subtitling will only be able to address these needs if subtitlers are trained to subtitle with the needs of specific subtitle user groups in mind, based on user group profiles. Subtitlers should also be able to advise decision-makers on the suitability of programme material for subtitling, and the style of subtitling. User group profiles should be kept current through systematic and representative user feedback.
- Subtitler training should provide the opportunity for the subtitling of material at different reading speeds, as well as the knowledge to decide on the appropriate reading speed for the average viewer in a particular user group and the suitability of material for subtitling at a specific rate.
- All non-linguistic audio elements should be subtitled in subtitling for the hearing-impaired, and the use of standardised non-verbal cues should be encouraged to minimise intrusion, especially where the target viewer group includes beginner-readers.
- Subtitler training should equip prospective subtitlers to make choices that will simplify reading, without unduly raising the level of inference, and encourage reflection on the nature and consequence of chosen language structures. This

should be balanced with the need for phoneme-grapheme correlation in subtitling for beginner readers.

- Furthermore, it should instil in prospective subtitlers the ability to estimate the type and degree of correlation required between audio and subtitles, and to present these concurrently with the audio.
- Translation as part of subtitler training should build on a high level of existing proficiency in both the target and source languages, as well as sharpen translation skills in the context of subtitling. It should also foster an awareness of the special demands subtitling places on translation between various official languages in South Africa.
- Subtitler training should create an awareness of the range of vocabularies of the potential viewer groups, and equip subtitlers to select vocabulary that is appropriate for the target subtitle user group(s).

These parameters are by no means the only requirements for subtitler training in South Africa, although they shape the nature of the South African subtitling landscape. They should form part of a South African course for the training of subtitlers, based on universal subtitling skills such as condensing, synchrony and the attainment of semiotic equivalence.

Chapter 2, *Existing subtitler training programmes: benefits and challenges for South Africa as a developing country*, investigates existing subtitler training programmes in foreign countries to determine to what extent they are useful in the South African context. The extent to which these programmes are suited to the South African subtitling scene will be determined by the extent to and success with which these parameters are dealt with in the respective programmes. Chapter 3 will propose a curriculum outline for the training of subtitlers in South Africa, whereas chapter 4 will propose a subtitling model for balancing equivalence and condensing.

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CHAPTER 2: EXISTING SUBTITLER TRAINING PROGRAMMES: BENEFITS AND CHALLENGES FOR SOUTH AFRICA AS A DEVELOPING COUNTRY

2.1 Introduction and problem statement

A survey of existing subtitling courses indicates that they range from vocational training on the one end of the spectrum to theoretical-academic on the other. One of the first challenges for South Africa will therefore be to decide where it should position itself on this continuum of subtitler training.

A second important challenge is presented by the fact that almost all of the existing subtitling courses are presented in developed countries, whereas South Africa is classified as a developing country. The greater affluence in developed countries means that there is more money available for a non-bread-and-butter issue such as language transfer. In addition to this, the average level of literacy of the viewer population in developed countries is higher than that of the viewer population in developing countries (PBS, 2002).

This chapter investigates existing subtitler training programmes in developed countries as a point of departure in attempting to determine the challenges that face South Africa as a developing country in this regard. In order to position subtitler training meaningfully in terms of outcomes, existing courses are plotted on a continuum with vocational training at one extreme and academic-theoretical education at the other.

To focus the discussion further, existing courses are investigated in terms of the national context of subtitling, the demographics of the country, legislation and policies that have a bearing on subtitling, training aims, academic level, course duration, course content, subtitling equipment or software used, practical training, entry levels, ideal candidates, assessment, and the use of scripts in training.

This chapter will attempt to find possible solutions to these problems as far as the training of subtitlers is concerned. This will be based on an overview of existing courses and will also take into account the set of uniquely South African user-based parameters as defined in chapter 1.

2.2 Overview of courses

This survey of existing subtitling courses is based on descriptions of courses in academic articles, university calendars, conference papers on the training of

subtitlers, and personal visits to training organisations and academic institutions.⁷ The selection of courses for discussion in this chapter is exemplary of different training models, ranging from vocational training to academic-theoretical education.⁸ Vocational training can be defined as training that is almost exclusively practical (the **how** of subtitling), whereas academic-theoretical education is more concerned with the **why** of subtitling.

The training programmes studied as examples of existing programmes are mainly from European countries where audio-visual translation is a well-established phenomenon. Traditionally, many countries have shown a preference for either subtitling or dubbing as a means of language transfer (Dries, 1995:1; Gottlieb, 2004a:173). However, it would seem that even some of the countries that have previously been classified as dubbing countries (such as Germany and France), are at present showing more interest in subtitling as a means of audio-visual language transfer. This is evident in the growing number of subtitling courses available in these countries. The study also includes information on subtitling courses in Australia, where subtitling is a well-established phenomenon, and a first training programme for subtitlers in Taiwan.⁹

In order to arrive at relevant conclusions concerning a training programme in South Africa, this chapter will compare existing subtitling courses in terms of the following aspects:

- The national context of subtitling.
- Training aims.
- The academic level at which the course is presented.

⁷ For the purpose of this paper, subtitler training institutions will include institutions that offer training for interlingual or intralingual subtitlers. It therefore includes the training of off-line subtitlers or same-language subtitlers, but not on-line or real-time subtitlers. The reason for this is that the skills required for on-line subtitling vary widely from those required for off-line subtitling. On the other hand, all off-line subtitling, whether interlingual or intralingual, share certain characteristics. It should also be noted that course descriptions tend to focus on contents (skills and knowledge), as opposed to methodology. However, Kiraly (1999) points out that methodology and the underlying epistemology is central to translator education.

⁸ The debate on the balance of training vs teaching or education is not limited to the field of subtitling. Asensio (1999), Gouadec (1999), Kiraly (1999) and Mossop (1999) offer some perspectives on this in the general field of translator and interpreter training.

⁹ For a brief yet comprehensive summary of the audiovisual translation course at the University of Vic, Spain, see also Francesca Batrina and Eva Espasa (2005). No reference is made to this training programme in the current chapter, as this information was not available at the time of publication of the original article in SALALS.

- The duration of the course.
- The course content.
- Subtitling equipment or software used in the course.
- The place of on-the-job training or internships in the course.
- Entry levels and recognition of prior learning.
- Type of candidate envisaged for the course.
- The assessment of progress.
- The use of film or television scripts in training.

The discussion under each of the headings will refer to selected examples from the courses studied. Not all of the training programmes are necessarily discussed under each of these headings. By pointing out commonalities in and differences between the programmes, it will be possible to plot them on the vocational training/academic-theoretical education continuum of existing subtitling courses (Figure 2.1).

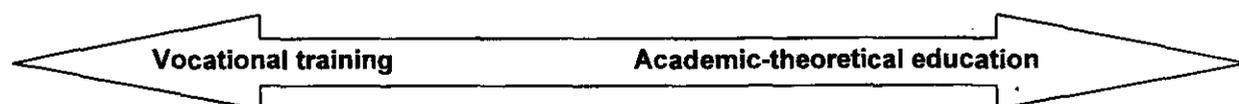


Figure 2.1 Continuum of existing subtitling courses

Although most subtitler training programmes tend to have either a vocational or an academic-theoretical focus, it is important to note that they often include elements from the other side of the continuum. In the description of the courses, both the overall focus and the individual elements included will be studied.

2.2.1 The national context of subtitling

The first important aspect in the comparison of existing subtitling courses is the national context of subtitling. This includes aspects such as the history of subtitling in the particular country, demographics, and legislation that has a bearing on subtitling.

The history of subtitling refers to whether countries have a history of audio-visual translation, and if so, a preference for either subtitling or dubbing. It also refers to the number of years that subtitling has been done in a specific country.

Gottlieb (1996:282), in his description of the course in Audiovisual Translation at the University of Copenhagen (KU), points out that it is "deeply rooted in Scandinavian subtitling tradition". Denmark has been subtitling since 1929 and because of this well-established subtitling tradition, Danish students are thoroughly acquainted with

subtitling as a means of language transfer. This means that they have an extensive passive knowledge of subtitling on which a course in subtitling can draw (Gottlieb, 1996:282, 290).

The historical preference for subtitling or dubbing as means of audio-visual language transfer is often linked to demographic features, including the number of speakers of a particular language (Dries, 1995:1; Gottlieb, 2004a:173). Dubbing countries tend to have larger, predominantly monolingual populations that have the means to afford this more expensive form of audio-visual language transfer and the will to assert themselves linguistically. Subtitling countries tend to be countries with smaller populations, often with more than one official language or where multilingualism is encouraged.

The national context of subtitling also concerns legislation and language policy that may have a bearing on subtitling. Gottlieb (1996:281-2) mentions the Irish Republic, Basque Country and Catalonia where subtitling has been introduced to address the situation of previously marginalised or minority languages. The position of Welsh in the UK can be cited as a further example of this. This has created an unprecedented demand for subtitlers in otherwise non-subtitling countries. Another category of legislation that has a bearing on subtitling is legislation regarding people with disabilities and access to information, as in the case of Britain. In Australia, the main *raison d'être* for the Australian Caption Centre (Baker, 2002), is to provide intralingual subtitling in accordance with Section 24 of the *Disability Discrimination Act*.

In terms of a national context of subtitling, South Africa faces a number of challenges, including the lack of a history or tradition of subtitling, the constraints posed by the fact that South Africa is a developing country, as well as the fact that there is no specific legislation on subtitling in either free-to-air or commercial television broadcasting.

- **Lack of a history of subtitling**

Unlike subtitling countries in Europe that have a history of subtitling, this form of language transfer has only been used with any regularity in South Africa since 2001. The lack of a history of subtitling means that there is no culture of subtitling, and subtitling students therefore do not possess the same amount of passive knowledge about subtitling as students in subtitling countries. Furthermore, the general viewing public has not been educated in the use of subtitles, and this may result in viewer resistance. Subtitling courses should therefore include a thorough theoretical grounding for students in the worldwide use of subtitles and the advantages subtitling

holds for viewers. This aspect can largely be addressed through the study of literature on the subject. A comprehensive theoretical grounding will mean that the course will have to contain elements that are situated more to the right of the vocational/academic-theoretical continuum (Figure 2.1).

- **South Africa as developing country**

In terms of demographics South Africa differs significantly from traditional subtitling countries that are by and large classified as developed. As a developing country, South Africa is less wealthy, and therefore has limited means available for non-bread-and-butter issues. In order for subtitler training to take place within the constraints of a developing country, while at the same time addressing the needs of a developing country, a number of steps will have to be taken. Firstly, initial training should take place within existing recognised training institutions to minimise the initial layout for facilities. Secondly, students should be instructed in the advantages of subtitling, specifically the advantages that this mode of language transfer holds for a multilingual developing country (such as access to information, improved literacy and second language acquisition, as well as the affordability of subtitling as means of language transfer). These topics are amply covered in subtitling literature and should form part of a literature study. Once again, this means that the course will have to contain elements that are more academic-theoretical than vocational. In the third place, the training of subtitlers for a developing country will have to produce students who do not only have a good theoretical grounding, but who are also able to subtitle successfully in the South African context. Ultimately, the subtitles they produce should address the needs of South Africa as a developing country and be part of the solution to the problems faced by a multilingual developing country.

The implication of these steps is that, although the course will have to contain a number of elements that are situated more to the right of the vocational/academic-theoretical continuum (Figure 2.1), it should also provide solid vocational training if subtitling is to make a positive contribution in the country. The aim of a South African subtitling course should therefore not merely be to provide a theoretical grounding in subtitling for students, but also to produce subtitlers who have the ability to produce subtitles of the required type and standard to address the needs of the country.

- **Legislation**

As far as legislation is concerned, there is at present no legislation or official policies that call for or regulate the implementation of subtitling in South Africa. However, Section 3 and Section 9 of the Constitution of the Republic of South Africa

respectively address the issues of language and disability rights, and subtitling provides a means to address both of these issues (RSA, 1994). One of the main challenges of subtitler training in South Africa will be to address language rights and access to information in a multilingual society. The relevance of a South African course in subtitling will largely be determined by the measure in which subtitling is used to assist with the implementation of these two sections of the Constitution. This challenge can be addressed by providing a firm theoretical grounding in the course on the requirements of the Constitution in these two sections. Students will need to know in what way and to what extent subtitling could be used to redress skewed language rights and promote disability rights. This third significant challenge for a subtitler training course once again confirms that the course will need to be firmly grounded in the academic-theoretical extreme of the continuum, as well as in the vocational extreme. This is the case since subtitlers will also need to be able to produce the type and standard of subtitles that address the problems related to legislation in an adequate way.

The national context of subtitling in countries where subtitler training is presented is one of the main aspects that shape subtitling courses. It is important for any South African subtitling course to be rooted in the domestic context of subtitling to ensure maximum relevance. The range of training aims of subtitling programmes in the next section reflects the diversity in training, as well as the regular recurrence of certain core issues.

2.2.2 Training aims

Most training programmes are directed at delivering qualified subtitlers to supply in the needs of the industry. This is true for academic institutions such as ISTI, the University of Toulouse le Mirail, the University of Nice Sophia Antipolis, the Ionian University, as well as in-house training institutions such as the Australian Caption Centre and SBS.

However, there are exceptions. In spite of the fact that the University of Copenhagen states that its aim is the “teaching of practical skills by striving to attain professional standards”, and the fact that many of the students would like to become professional subtitlers, it states quite explicitly that it has never been the aim of the course to supply the Danish subtitling industry with labour (Gottlieb, 1996:281-2).

The University of Copenhagen is not the only institution to have a wider aim for its course than the training of subtitlers. UMIST (2002:6) states that its aims for the first semester of the course on Audiovisual Translation are:

- To develop knowledge and skills required for producing a translated version of an audio-visual product.
- To familiarise students with professional practices in the field.

Aims for the second semester are:

- To offer an overview of theoretical and practical issues in the domain of film translation.
- To sensitise students to the various constraints on the practices of dubbing and subtitling, including linguistic and cultural problems specific to audio-visual translation and the influence of film technology on translational strategies (UMIST, 2002:12).

The above aims seem to indicate that although subtitling skills form part of the course in Audio-visual Translation, the aim is wider and includes an understanding of subtitling as discipline, as well as knowledge of subtitling literature.

Only one training institution, namely Titelbild in Berlin, indicates that it also aims at the training of subtitler trainers.

The challenge for a South African subtitling course will be to formulate aims that are rooted in the national situation and address the needs of a multilingual developing country with integrity. From the above, it is clear that other training institutions choose to have either a more theoretical-academic or a more vocational focus. In South Africa there is a need for trained subtitlers to supply in the future subtitling demand of the country. The implication of this for a subtitling course is that it should have a strong vocational focus. Nevertheless, in order to be able to make a positive contribution to the founding of this new discipline in South Africa, students will need to have a thorough theoretical knowledge of subtitling. Subtitling students in South Africa are pioneers in the field as no subtitling has so far been done in any organised way in the African languages (or any language other than English), and they will be helping to determine guidelines for future subtitlers.

To ensure sound subtitling practice from the start, one of the aims of a South African subtitling course will therefore have to be the acquisition of an overview of existing, acceptable subtitling practice around the world. As a further aim, they will also need to be able to evaluate their own and others' subtitles in the light of acceptable subtitling standards.

The range of aims for subtitling courses reflects the range in scope of these courses, as well as the varying levels at which the courses are presented. The next section will investigate the level at which the various subtitling courses are presented.

2.2.3 Academic level at which the course is presented

The academic level at which international courses are presented varies greatly. Since not all of the training organisations are recognised training organisations or academic institutions, some of them offer on-the-job training with no formal qualification awarded on completion of the training. Training at these organisations does not normally include formal courses that run at regular intervals, but rather consist of one-on-one training sessions where the trainee receives instruction from a qualified subtitler. This group of training organisations includes broadcasters such as SBS (McLennan, 2002), and subtitling agencies such as the Australian Caption Centre (Mikul, 2002; Varley, 2004).

Titelbild is an example of an organisation that combines the qualities of an academic institution with those of an in-house trainer. Although it offers in-house subtitler training in support of its commercial subtitling endeavours, it also offers recognised subtitling courses (Titelbild, 2000).

Most of the subtitling courses offered at academic institutions form part of a master's programme, and it is often called a master's in Audio-Visual Translation or Screen Translation (examples can be found at UMIST, the University of Copenhagen, the University of Toulouse le Mirail, the University of Antwerp, ISTI at HEB in Brussels, and the University of Nice Sophia Antipolis). As such, these courses are aimed at candidates with a more advanced (specialised) level of tertiary education and translation or life experience. The fact that none of the academic institutions studied for the purpose of this chapter offers subtitler training at an undergraduate level, seems to confirm that subtitling is generally seen as a form of specialisation within the discipline of translation studies.

One of the challenges for the training of subtitlers in South Africa could be the identification of candidates who are ripe for specialisation in subtitling and the academic challenges of a post-graduate qualification. Apart from students who have completed a degree in language practice or in languages with translation studies, these candidates could also be drawn from the body of established language practitioners (translators or interpreters) in the country.

In view of the fact that subtitling is such a new discipline in South Africa and that students will contribute to the establishing of guidelines for subtitling in the various African languages, they will require a thorough understanding of the translation problematic in the languages in which they work, as well as solid theoretical grounding in the unique challenges of subtitling. This implies that the course should offer more than strictly vocational training and that it will also have to contain a solid academic-theoretical basis. Although subtitler training in South Africa should have a definite vocational focus, the academic level of the training should equip students to make a positive contribution to the establishment of this new discipline.

While the academic level at which the course is presented does not necessarily give an indication of the actual subtitling skills acquired by participants, it generally reflects the scope of the course, which is in turn linked to the course duration.

2.2.4 Duration

Given the range of aims as well as academic levels at which subtitling courses are presented, it comes as no surprise that the duration of training varies from 50 hours over two weeks for the introductory course in subtitling at Titelbild, to several months of full-time training (e.g. at SBS and the Australian Caption Centre), to several hours per week over one or two years as part of a master's degree (e.g. at ISTI, UMIST and KU).

As with training aims and level, it is the scope of the training that determines the duration. On the whole, it can be said that subtitling courses with a more theoretical focus are significantly longer than those that focus primarily on the acquisition of practical subtitling skills. A greater theoretical scope is likely to be required for undergraduate candidates with a limited knowledge of language practice, because of their lack of experience in and theoretical knowledge of the field. On the other hand, candidates who are established language practitioners may only require re-training to enable them to utilise their existing translation or interpreting skills in the new context of subtitling.

As far as the South African situation is concerned, the two main challenges that need to be addressed in terms of duration, are determining the length of a course that allows sufficient time for theoretical and practical training instruction, while at the same time providing flexibility based on the candidate's level of prior knowledge.

2.2.5 The course content

The range of scopes in subtitling courses is also reflected in the course content. The shorter, non-academic courses, tend to focus on the acquisition of practical subtitling skills (the **how** of subtitling), while the longer, academic courses also make provision for subtitling theory (the **why** of subtitling, and to a varying degree, the **how**). The longer courses (often called courses in Audio-visual Translation or Screen Translation), may also include other types of audio-visual language transfer, for example dubbing.

Imhauser (2000) suggests a taxonomy of practical skills, and most of the practical skills taught by other institutions echo this, albeit in a slightly different format (e.g. Chen, 2003:2-3; Gottlieb, 1996:286; and Karamitroglou, 2000a:2):

- **Technical skills:** Including sensitivity with regard to image and sound, the ability to manage the constraints on time and space in subtitles, cueing or spotting, and the projection of subtitles.
- **Linguistic skills:** Including condensing and adaptation skills, reformulation skills, as well as skills in the distribution of text, proofreading and aural comprehension.
- **General skills:** Including film production, visual literacy, jobs in film or television, language policy, computer literacy, knowledge of the market, development of the market and professional practice.
- **Project management:** Including contact with other professionals, a critical project plan, division of tasks, preparation of translation, and quality management.
- **Human relations:** Including listening skills, empathy, curiosity, open-mindedness, stress management skills, adaptability, tact, tolerance, a sense of responsibility, a pioneering spirit, and creativity.

The theoretical component of subtitling courses (University of Toulouse le Mirail, 2003:1; Gottlieb, 1996:286; UMIST, 2002:12; University of Nice Sophia Antipolis, 2003:1) includes topics such as:

- The history of film and film translation.
- Film semiotics.
- Principles of good subtitling practice.
- Quality criteria and critiquing of subtitles.
- Dubbing versus subtitling.

- Screen translation versus literary translation.
- Linguistic and cultural differences between source and target audiences.
- Genre- and audience-specific subtitling strategies.

At the University of Copenhagen the theoretical component over two semesters involves some 1000 pages of reading (Gottlieb, 1996:292). UMIST also offers a directed reading option as part of the MA in audio-visual translation.

The distinction between practical and theoretical components of subtitling is not always clear in these courses, as these occur on a continuum with practice and theory as extremes. Thus, it is necessary to have knowledge of the criteria for good subtitles in order to be able to produce good subtitles, just as it is necessary to understand the basic principles of film semiotics in order to produce good subtitles. Although the emphases of the courses under consideration vary considerably, none of them attempts to present a subtitling course which focuses exclusively on either theory or practice. Gottlieb (1996:290) rightly says that it is "of the utmost importance to stimulate interaction between theoretical insight and practical competence in the student".

South Africa has much to learn from studying the composition of other subtitling courses around the world. The vocational training programmes offer sound practical guidance, while the theoretical components of the academic-theoretical courses offer a thorough theoretical grounding in matters such as the history, theory, economics, philosophy, and context of subtitling. However, the test for a successful South African course will be the ability to strike a balance between existing predominantly European subtitling theory and the creation of a new discipline that takes into account the unique linguistic and language-political situation in a developing country in Africa.

2.2.6 Subtitling equipment or software used

Although all the subtitling courses offer practical training in the creation of subtitles on dedicated subtitling software, a much wider range of subtitling software is used in the industry. This is the reason why ISTI has developed its own subtitling software for use by students. The use of generic, non-commercial subtitling software has the advantage of preparing students for working with whatever software they are required to work with when they start working as subtitlers, instead of providing software-specific training. The generic subtitling software has the added advantage

that it can be made available to students for work at home, without creating problems in terms of licensing.

Professional subtitling software used in the training of subtitlers includes:

- *Screen PU 2000, PU 1000 (University of Copenhagen)*
- SOFTEL SWIFT (Australian Caption Centre)
- Sony SVO5800P (SBS).
- Cavena Scantitling STWin and Titlevision (University of Antwerp).

The use of subtitling equipment in the training of subtitlers poses significant hurdles for a developing country, because of the initial financial layout that is required.¹⁰ Kruger and Kruger (2003) estimate that the initial cost of setting up ten subtitling stations would be in the region of R535 000. This excludes regular maintenance, support and the rent of a venue for the centre. However, the North-West University has already made progress in the development of its own non-commercial generic subtitling software which enables them to teach subtitling skills at a very low initial financial layout. This software is used in support of the two professional systems namely STWinPro (analogue) and Tempo (digital) from Cavena. The drawback of this system is that it does not allow students to produce a commercial end-product, as the final output is not recordable. Nevertheless, it could form a valuable transition between theory and an internship in a subtitling studio (Kruger & Kruger, 2003:27).

2.2.7 On-the-job training or internships

The more the course is aimed at vocational training, the greater the part of the training that is done on the job, as is the case at both the Australian Caption Centre and SBS in Australia. However, academic institutions that present subtitling courses often try to strike a balance between theory and practice by including compulsory subtitling internships as part of their courses. These internships are in addition to the practical subtitling component of the course and provide students with the opportunity to work in a real subtitling environment with all its associated pressures. In this way, the University of Toulouse le Mirail includes a 200 hour per year subtitling internship at the French television station *France 3*. Another academic training institution which places great store in subtitling internships is ISTI where students produce and project (live) subtitles at the annual animation festival (Anima) in Brussels.

¹⁰ Although there are demonstration versions, shareware and even freeware (e.g. Sun Station Alpha, Adobe) for subtitling available on the internet, these programmes are all limited in their applications. They are useful for the teaching of some subtitling skills, but do not cover the full range of subtitling skills.

South Africa is in a unique situation at the moment in trying to supply in a demand for subtitlers which is yet to be created (Kruger and Kruger, 2003:5, 22). Subtitling could potentially be used to address issues of language rights, access to information, second language acquisition and literacy, but this has not yet convinced decision-makers to implement subtitling in a responsible manner and on a large scale. On the other hand, it is also necessary to have fully-trained subtitlers available when the decision to implement subtitling is made. However, until this happens, subtitling students do not really have the opportunity for subtitling internships, a very important component of vocational training. Kruger and Kruger (2003:34) suggest that the establishment of a subtitling centre could provide an opportunity for students to do internships by providing the infrastructure of a professional subtitling studio. Nevertheless, other possibilities, like the subtitling of training material to be used at tertiary institutions or elsewhere in the educational sector, could be investigated as an interim measure.

2.2.8 Entry levels and recognition of prior learning

Entry levels vary according to the academic level at which the course is presented. Academic institutions presenting subtitling courses as part of an MA in Translation or Audio-Visual or Screen Translation, require a BA in Modern Languages or similar background (Gottlieb, 1996:281). As for other types of translation studies, students are required to have an excellent command of their source and target language(s).

Non-academic institutions that offer on-the-job training such as the Australian Caption Centre (Mikul, 2002) and SBS (Sant, 2002) may also require, in addition to the passing of a rigorous entrance examination, a university degree with English and/or other modern languages as majors in order for candidates to be allowed into training programmes, as well as accreditation with the national translators' institute.

The current chapter has already indicated that one of the challenges for presenting a subtitling course in South Africa will be to present it at an academic level that will equip students to make a contribution to the development of this new discipline. The first implication of this is that students will need a solid grounding in existing theory of subtitling, but more importantly, they will need to bring with them an existing knowledge of the unique translation problematic of their particular language pair(s). It would seem that "experience in interpreting and translation is beneficial" (Kruger & Kruger, 2003:23). If that is indeed the case, recognition could be given for prior learning in the form of existing accreditation as a language practitioner with the South African Translator's Institute or the envisaged language board. This accreditation is

skills-based and not qualification-based and is therefore not limited to candidates with a formal academic-theoretical background. The challenge for South Africa will be to identify the most suitable candidates in language practice for re-training in subtitling.

2.2.9 Type of candidate envisaged for the course

The entry level of the courses already excludes certain candidates from training programmes. However, some of the training institutions have additional criteria for the type of candidate at which their subtitling course is aimed, such as the University of Copenhagen which specifies that its course is aimed at mature-age students (Gottlieb, 1996:281). The result is that their students range from 25 to 60 years of age, with most of them between 30 and 45.

Titelbild specifies that its introductory course in subtitling is aimed at experienced translators who would like to branch out into a new field of translation, as well as subtitler trainers.

SBS (McCormick, 2002) specifies that its candidates for subtitler training should already be good translators. Candidates are required to have a good technical capability, and court interpreters have generally been found not to be suitable (unlike in the USA where captioning practitioners are often drawn from this profession as can be seen in any advertisement for a captioning position in that country). They also require candidates to have a good analytical mind in order to be able to deal with the semiotic intricacies of subtitling. As far as physiological characteristics are concerned, they require candidates to adhere to certain requirements for hearing and vision.

As we have seen in the previous section, the main criterion for admission to a South African subtitling course could be that students should be recognised language practitioners. In addition to this, students will need to have the capacity to master sophisticated technology. Experience in short courses in subtitling conducted at the Vaal Triangle Campus of the North-West University in 2001, 2002 and 2004 has shown that not all good language practitioners necessarily have this capacity. Part of the challenge will be to select candidates for re-training as subtitlers who can make a contribution to the discipline from the corps of existing language practitioners. Course evaluation will indicate if they have indeed achieved the required course outcomes.

2.2.10 Assessment of progress

Progress is assessed in different ways according to the scope and academic level of the subtitling course.

At the Australian Caption Centre, for example, students complete a six-month probation period (which includes their training) after which they are evaluated in terms of output and accuracy (Mikul, 2002).

The assessment in the course in Screen Translation at the University of Copenhagen has a theoretical and practical component in both the first and second semesters. At the end of the basic module (first semester), students sit an oral examination and a three-hour *prima vista* subtitling session (Gottlieb, 1996:283). At the end of the specialised module (second semester), students produce a 20-page scholarly paper and professional-looking subtitling (or dubbing) for a 25-minute television programme or film (Gottlieb, 1996:284). Grades range from 03 (unacceptable) to 13 (exceptional) (Gottlieb, 1996:285).

At UMIST, evaluation during the first semester of the course in audio-visual translation is based on two practical tasks in translating audio-visual product (either subtitling or dubbing). The evaluation for the second semester is based on two practical tasks with written rationale in translating audio-visual product (UMIST, 2002: 6, 12).

The different formats of evaluation at the various training organisations reflect the academic level, scope and content of the subtitling courses. Courses at academic institutions include a theoretical as well as practical component, whereas assessment at in-house training organisations focuses on practical subtitling skills.

As part of the national context of subtitling (2.2.1), we have seen that subtitling students in South Africa do not bring with them a large passive knowledge of subtitling. The implication of this is that they will require a theoretical grounding in existing subtitling theory. However, they are also required to have good translation skills in order to be admitted to the course, since this is largely what interlingual subtitling is about. Lastly, they are required to have the capacity to master the practicalities and technicalities of subtitling. In the evaluation of students, one of the components will be to assess if they have met the theoretical outcomes of the course. In addition to this, they will also be evaluated in terms of their translation skills and their ability to produce a professional-looking end product. The last point is particularly pertinent, as vocational training is a strong focus of the South African course, along with an academic-theoretical focus. The challenge will be to reflect this double focus in the course aims and content, as well as the evaluation.

2.2.11 Use of film/television scripts in training

Although the use of scripts in training may not seem important enough to warrant discussion here, it is referred to in some course descriptions, usually by those who either have a strong preference for or against it.

Chen (2003:3) highly recommends the use of scripts in the teaching of subtitling, especially for non-L₁ speakers.

At the other end of the spectrum is a course such as the one presented at the University of Copenhagen. Gottlieb (1996:284) states that students should learn to work unscripted, since:

- Scripts are often incorrect in the places where students most need them; and
- Without scripts students are more likely to maintain a holistic view of the creation of subtitles, rather than be tempted to merely translate “some lines from a script and shaping them into text blocks”. Subtitling should recreate dialogue within the visual and aural context of the film, and not by working with language in isolation.

At the centre of the scripted-unscripted continuum is an institution such as SBS (McLennan, 2002) where scripts are used when available, and then only as an aid.

Scripts seem to be useful only when subtitlers realise that they are not infallible. However, it is sometimes very difficult for non-L₁ speakers to understand what is being said on-screen, especially where it involves dialects or pronunciation which is foreign to them. In these instances, it could be useful to have access to a script, if the script is accurate. The ideal is to train subtitlers who are used to working without scripts, but there should always be flexibility in allowing them to refer to scripts where these are deemed to be accurate.

2.3 Conclusion

Existing subtitling courses are mostly taught in developed countries. They can be plotted on a continuum with vocational training at the one extreme and academic-theoretical education at the other.

These courses are designed within a national context of subtitling, which refers to the history of subtitling in the particular country, the demographics of the country, and legislation and policies that have a bearing on subtitling. Courses also differ in terms of aims, academic level, duration, contents, subtitling equipment or software used, on-the-job training or internships, entry levels, the type of candidate envisaged for the course, assessment, and the use of scripts in training.

There are significant differences between courses presented in the various developing countries. These differences can be ascribed to the unique subtitling contexts in these countries. South Africa, as a country in which subtitling is new, should take cognisance of the fact that differences between the subtitling in developed countries are relatively small compared to the differences between them and a developing country such as South Africa.

Any South African course in subtitling should be rooted firmly in the domestic subtitling context. The aims of the course should reflect the needs of the country, as determined by a needs analysis. Course outcomes should be formulated to ensure achievement of these aims. Although a South African course can draw on a large body of existing, predominantly European, subtitling literature and research, it should interpret this information within the South African situation. Where foreign subtitling training programmes do not provide answers to the domestic subtitling situation, research should be conducted to determine the best way to address South African needs. One of the main points in which a South African course will differ from existing courses, is that it needs a strong academic-theoretical foundation, balanced by considerable emphasis on vocational training. The product of a South African subtitling course should be subtitlers who are capable of producing qualified subtitles within the South African situation, but who are also firmly entrenched in generic subtitling theory enabling them to contribute to the development of subtitling as a new discipline in South Africa.

In the next chapter an outline will be proposed for a curriculum for the training of subtitlers in South Africa based on the user-based parameters in the previous chapter and the challenges and benefits for South Africa as developing country in comparison to existing subtitler training programmes.

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CHAPTER 3: TOWARDS A CURRICULUM FOR THE TRAINING OF SUBTITLERS IN SOUTH AFRICA

3.1 Introduction and problem statement

To ensure that a curriculum for the training of subtitlers in South Africa is suited to the domestic context, a range of user-based parameters for the South African situation were identified in chapter 1, *User-based parameters for the training of subtitlers in South Africa*. These parameters centre on reading speed, vocabulary, access to non-linguistic audio elements, and knowledge of the source language. A summary of existing subtitling courses, mostly from developed countries, was presented in chapter 2, *Existing subtitler training programmes: challenges for South Africa as a developing country*, with reference to ways in which these aspects could be adapted to the local context.

The challenge for a South African curriculum for the training of subtitlers lies in the ability to address a uniquely South African set of user needs, by designing a curriculum based on existing courses. However, as these courses are mainly from developed countries, South Africa, as a developing country, most likely will need to adapt them to the domestic situation. In some cases, uniquely South African needs may require uniquely South African solutions, prompting the omission of less relevant aspects or the inclusion of additional aspects in a South African curriculum for the training of subtitlers.

Based on the user group parameters and drawing on the summary of existing subtitling courses, this chapter will propose a localised curriculum outline for the training of subtitlers in South Africa. 1

The next section will address three issues, namely:

- the most suitable type of institution for subtitler training in South Africa;
- core aspects of existing subtitling courses that should be included in a South African course; and
- the needs of potential subtitling user groups in South Africa that shape these core aspects.

The last section of the chapter will outline a curriculum for the training of subtitlers in terms of outcomes, content (skills and knowledge) and assessment.

3.2 The where and what of subtitler training in South Africa

The first issue that will be addressed is the type of institution at which subtitler training could best be presented.

3.2.1 Optimal training environment for South Africa

One of the most important contributions by Daniel Gile (1995) in his chapter on theoretical components in interpreter and translator training (extrapolated here to subtitler training as a specialised form of language practice training), is his acknowledgement of the fact that it is possible to access these careers without any formal training (on-the-job or theoretical). The fact that Gile does not automatically assume that formal training (and academic-theoretical training at that) is the only way to access these careers, prompts him to be very clear about the advantages one would expect to derive from formal language practice training. It is useful to assume the same stance for our purpose as it would be impossible to select the optimal training environment for subtitlers in South Africa objectively, if the training environment has already been pre-determined. Subtitler trainers in developed countries have by and large determined what the optimal training environment is for their particular national context, and they write from this particular perspective (cf. Gottlieb, 1996; Imhauser, 2000; McLennan, 1995). In South Africa we need to take a step back to enable us to evaluate the possible options. Gile's description of the various career paths, their advantages and disadvantages, and the place of formal training, provides a way of doing this.

At present, subtitlers are able to access their career path in three ways, namely by teaching themselves, through on-the-job training or, more recently, by completing a course in subtitling or Audio-visual Translation at an academic institution (Gottlieb, 1997:69, 135; Ivarsson, 1998:2-3). This is similar to the ways in which other forms of language practice (specifically translation and interpreting) have been accessed over the years (Gile, 1995:xi, xii, 3, 8). Gile (1995:2, 8) states that the first option (self-teaching) is not ideal, as it does not allow for accelerated progress by building on the experience of established language practitioners. Therefore, although it is possible to acquire language practical skills and knowledge in this manner, it is bound to be less effective and more time-consuming, because the content is not presented in a logical and systematic way through the introduction of theoretical models. In addition to this, there is an absence of quality control by an outside authority.

The second option, namely accessing language practice through on-the-job or in-service training offers its own set of advantages and disadvantages. Gile (1995:8-9)

identifies the following advantages of this type of training for interpreters and translators:

- individual attention (the trainee normally receives one-on-one instruction from a qualified and established language practitioner);
- stringent quality control (within a very short time, the trainee starts producing work for clients, albeit under close supervision of the trainer, requiring work to be of a professional standard); and
- the type of work and pressure under which it is done, are similar to what the language practitioner will eventually come into contact with in a professional situation.

Subtitling agencies visited during the course of the study that do in-service training, such as SBS and the Australian Caption Centre, indicate that these benefits also apply to subtitling. ² Although neither of these organisations offers a nationally accredited subtitler training course, subtitlers trained there have no difficulty in finding work with other agencies (McLennan, 2004; Varley, 2004). Low staff turnover at these agencies seems to indicate a high degree of job satisfaction among subtitlers that have undergone in-house training (McCormick, 2002).

The third option for accessing a career in language practice is by completing a course in language practice at a tertiary institution. Gile (1995:8-9) states that this, compared to in-service training, poses several challenges:

- the ratio of lecturer/trainer to students is greater than in in-service training (class sizes vary, but there is no time for sustained one-on-one attention);
- the lecturer/trainer may or may not be actively involved in language practice, which could result in the application of standards that would not be acceptable in practice; and
- exercises are often contrived, and may not necessarily accurately reflect and prepare the student for the realities of language practice as a service rendered to a client.

In spite of these drawbacks, academic training of language practitioners can be optimised by paying attention to the content of the course and the way in which it is structured. Although academic training will never involve the same amount of individual attention as in-service training, it has the potential to offer other important benefits. These benefits include presenting skills in a logical order as opposed to randomly dictated by work requests from clients, as well as offering theoretical

models to explain concepts of which an understanding is required for language practice. In addition, academic training has the potential to raise the professional standard of language practice by imposing strict selection criteria on admission and graduation. Furthermore, academic institutions also place a premium on research, which contributes to a sound basis for training (Gile, 1995:3, 9, 12-14).

In view of the fact that both the academic institution and the in-service training organisation offer unique advantages that cannot be replicated by the other, this chapter postulates that the ideal environment for subtitler training is a combination of an academic institution and a subtitling centre, or a combination between a formal academic environment and a practical training environment.¹¹

Courses in language practice are already offered at several South African universities and technical universities, as can be seen from the variety of courses registered or awaiting registration by the South African Qualifications Authority (SAQA). As in European countries, it makes sense to combine subtitling courses with other forms of language practice (translation and interpreting) training because of the shared translation component. Subtitling skills also presuppose higher-order translation, editing and proofreading skills, in addition to the more technical requirements of the mode. Apart from offering an environment in which skills and knowledge required for language practice can be presented in a logical and hierarchical manner, these institutions also offer the opportunity for research in these fairly new disciplines.

On the other hand, only a subtitling centre with a real-life working environment will truly prepare students for the demands of subtitling as a career. European academic institutions that offer subtitler training often deal with this problem by including a practical stint at a recognised subtitling organisation as a pre-requisite for the completion of the course. In the absence of such an existing centre in South Africa, it is suggested that a subtitling centre be established at a South African university to provide a general subtitling service to clients, while at the same time offering the opportunity for students to be trained in a real-life environment. North-West University already offers third-year students in translation studies the opportunity to acquire practical experience by involving them in the translation of study guides and other day-to-day translation jobs within the institution. This practice could be extended to the subtitling of training videos used by the university.

¹¹ This is also the opinion of Brian Mossop (1998) who states that "university-based translation schools must uphold the traditional distinction between education and training" and that "[t]he place of training is the practicum" associated with the course.

Having identified the optimal environment for the training of subtitlers in South Africa, the next section deals with core components that shape course content.

3.2.2 Some core aspects shaping existing courses

In the design of a subtitler training curriculum for South Africa, it is vital to take cognisance of training done elsewhere, as this will enable us to benefit from the experience of established subtitling countries. Core aspects that shape subtitling courses abroad include the following:

- **National context of subtitling:** Subtitler training takes place within a specific language-political environment in a country. Training outcomes should reflect the national subtitling context and needs of the country in which the course is presented. As a general rule it seems that the more urgent the need for qualified subtitlers in a country, the more practice-oriented the training is.
- **Academic level at which the course is presented:** The majority of academic institutions offering subtitling courses present these at post-graduate (master's) level. This reflects the notion that subtitling is a specialised form of translation, and that certain basic language practice skills need to be acquired before one can proceed to become a subtitler.
- **Duration of training:** Financial pressure often results in in-service training producing a qualified language practitioner capable of servicing client needs within the shortest possible time. Academic institutions, on the other hand, recognise that they have a set time over which the training can be spread out and that there is no advantage in completing the training within a shorter period of time.
- **Contents of subtitling courses:** This can normally be divided into two main categories, namely **skills** and **knowledge**. Core skills in subtitling include translation, condensing, optimal shaping of titles, and the ability to use subtitling software (including cueing). The knowledge component includes the history of subtitling, the language of film, and client needs.
- **Subtitling equipment or software:** Equipment used in training varies and can either be professional subtitling software, or generic software available as freeware or developed by the training organisation itself. By not tying training too closely to specific equipment and software, students are better prepared to adapt their skills to different environments.

- **On-the-job training and internships:** These opportunities offer unique training advantages that cannot be simulated in an academic environment. Academic training institutions that aim at supplying the subtitling industry with qualified subtitlers include this as a pre-requisite for completion of their subtitling courses.
- **Entry levels and recognition of prior learning:** These vary among different training organisations. For new language practitioners in training, subtitler training commonly takes place at master's level. A number of institutions offer recognition of prior learning.
- **Type of candidate:** Some courses are aimed at mature-age students, although post-graduate studies are also aimed at younger students with a proven academic record. Non-academic training organisations often require mature candidates with a relevant degree for admission to training.
- **Progress evaluation:** Evaluation of progress is done through theoretical and practical examinations at academic institutions, although it may also take the form of ongoing progress monitoring as part of a probation period in an organisation that offers in-service training.
- **Film/television scripts:** Scripts are either seen as indispensable tools for subtitling, or as dangerous crutches because they do not always reflect dialogue accurately. Although the use of scripts in courses is not on the same theoretical level as the other course components, it features prominently in a number of course descriptions.

It is important to reiterate that the above core aspects do not represent the complete answer to South Africa's subtitler training requirements as they originated in developed countries with language-political contexts that are vastly different to a multilingual developing South Africa. A successful subtitler training curriculum for South Africa will succeed in shaping the core aspects to address domestic user needs. In the case of subtitler user needs that are peculiar to a developing country, the curriculum will need to be localised through the inclusion of additional core aspects or the omission of aspects that are irrelevant to the local situation.

3.2.3 User-based parameters for subtitler training in South Africa

User-based parameters can be determined by means of user-group profiles to provide a demographic and linguistic cross-section of the viewer population enabling subtitling to be done with specific user groups in mind. Although subtitles are created with a specific user group (client) in mind, they are made as accessible as possible to other user groups, without compromising on vital aspects required by the primary

target user group. User profiles enable subtitlers to determine whether the various user groups have shared needs that could be served in the same set of subtitles.

One of the main criteria for successful subtitling is the use of an optimum reading rate for the particular viewer population. For viewers with a lower literacy rate, titles may need to be more condensed to enable slower reading (the norm for developed countries is between 120 and 160 words per minute). The converse is true for viewers with higher literacy levels.

If the target viewer audience for a specific programme has impaired hearing, non-linguistic audio elements need to be presented on-screen as part of the subtitles. As both intra- and interlingual subtitles will benefit viewers with impaired hearing, it is worth developing a system of visual cues for audio elements that take up as little screen space as possible. Minimal provision is currently made on South African public television for viewers with impaired hearing, and this may prove to be a successful way of addressing their needs, while at the same time addressing some of the linguistic and reading needs of other viewer groups.

Research by Jensema *et al.* (1996:284-5) indicates that the oversimplification of language structures in subtitles makes comprehension harder. This is due to omission of vital information as a result of over-condensing. Although on the surface subtitles may appear easier to read due to the absence of complex language structures, within the context of the film or television programme this may have an adverse effect on reading comprehension due to gaps in knowledge.

If the aim of intralingual subtitling is to promote literacy, there should be a high phoneme-grapheme correlation between audio and subtitle. Once again, an oversimplification and total rephrasing of the original audio may seem to simplify reading, but the discrepancy between audio and subtitle is confusing to viewers trying to match phonemes to graphemes.

In interlingual subtitling, translation issues between the language pairs concerned are likely to create a unique set of challenges for each individual language pair. An example of this is a significant increase in volume when translating from English into isiXhosa. It is impossible to borrow tailor-made solutions from established subtitling countries to South African translation issues. Although South Africa could benefit from studying the approach of other countries to individual phenomena in interlingual subtitling, the final solution will need to be home-grown as the combination of challenges is unique to each language pair involved.

The last aspect of user needs is the existence of a core vocabulary. Studies in the US have identified a core vocabulary of 500 words that enables viewers to understand most of the vocabulary in any television programme shown in the United States. This is only a fraction of the total vocabulary in the English language of approximately 500 000 words (Jensema, McCann & Ramsey, 1996). Instruction in the use of such a core vocabulary is likely to increase the reach of subtitles.

The curriculum for the training of subtitlers in South Africa proposed in the next section aims at expanding on core aspects that shape existing courses to address domestic user needs.

3.3 Proposed curriculum

The proposed curriculum for the training of subtitlers at a South African university has two general outcomes, namely that students must contribute to the establishing of subtitling as a means of audio-visual language transfer in South Africa in terms of internationally accepted standards and consistency, and that they must be able to address the subtitling needs of specific user groups in the South African context. In order to be able to contribute to the establishing of subtitling as a means of audio-visual language transfer in South Africa in terms of internationally accepted standards, students should be able to create subtitles that reflect an in-depth knowledge of subtitling theory (prescriptive and descriptive), as well as the semiotics of television and film. For students to be able to address the subtitling needs of specific user groups in the domestic context, they will need to be firmly grounded in the language-political situation in the country, have an understanding of the role that subtitles can play in addressing certain needs and be able to implement this knowledge in the creation of subtitles with specific user groups in mind.

These general outcomes will be achieved through specific outcomes that are distinct, observable and measurable, as set out in the next section. Specific outcomes will be discussed briefly, before they are broken down into knowledge and skills required for the achievement of this outcome.¹²

3.3.1 The student must contribute to the establishing of subtitling as a means of audio-visual language transfer in South Africa in terms of internationally accepted standards and consistency.

¹² As the aim of the article is to provide an outline for a curriculum, it does not provide a detailed breakdown of knowledge and skills as required in terms of South African Qualifications Authority (SAQA) unit standards. However, all knowledge and skills outcomes have been formulated with this in mind and are able to be broken down to this level as part of Outcomes Based Education.

3.3.1.1 The student must be able to produce a faithful translation of the original.

Interlingual subtitling involves translation within certain very narrow parameters. In normal interlingual translation, the translator is not strictly bound to the number of characters or words to be used. Therefore, there is often an increase or decrease in text volume from the source to the original, depending on the language-pair that is involved. In subtitling, however, conventions dictate the number of lines and number of characters that are available for the translation. These conventions have been formulated to promote optimum readability of subtitles. As a rule of thumb, no more than 70 characters (including spaces) distributed over two lines are to be used in any six-second period. Another way of putting it would be to say that 140 words per minute are available for the translation. This is far less than the rate of fast speech which is approximately 220 words per minute.

As in the case of translation proper, the interlingual subtitler is required to create a translation that is equivalent to the source text. In addition to this, the interlingual subtitler is also required to create a translation that complies with a certain text volume. In order to be able to do this, the interlingual subtitler needs to be a translator of above-average ability. The greater the number of acceptable translations the interlingual subtitler can come up with, the more likely the possibility that s/he will be able to satisfy the translation requirement as well as comply with the spatial constraints. This ability is a product of in-depth knowledge of the source and target languages, including an extensive vocabulary, synonyms and the use of pronouns.

The high standard of translation required for subtitlers is reflected in the fact that most subtitler training courses are presented at post-graduate level. This assumes at least three or four years of undergraduate studies in languages and/or translation studies. Translation tests commonly form part of entrance examinations for these courses, whether academic or in-house, in order to identify candidates with proven translation capabilities.

In order to be able to achieve this specific outcome, the learner must have specific knowledge, as well as skills, as will be explained below.

- **Knowledge**

Firstly, the learner requires a solid knowledge of the source and target languages that s/he intends to work in. An in-depth knowledge is required of these languages, with particular emphasis on extensive vocabulary.

The learner also has to understand the translation problematic related to translation between her/his target and source language(s) as well as the conventions of subtitling in order to ensure optimum readability.

- **Skills**

Apart from the above knowledge, the learner has to master specific skills in order to achieve the outcome. S/he has to be able to demonstrate a very high level of proficiency in both the target and source languages, with L₁-proficiency in the target language at the least. Additionally, s/he has to be able to resolve the translation problematic between source and target language by producing high-quality translations. Finally, the learner must be able to produce a range of valid translations with varying lengths based on the use of synonyms, pronouns and other forms of linguistic substitution.

3.3.1.2 The student must be able to create qualified subtitles within a poly-semiotic context.

Not only should the potential subtitler be able to produce a faithful translation of the original within the spatial and temporary constraints inherent to subtitling, but the subtitle must also work within the poly-semiotic context of film or television.

Traditional translation involves rendering a written text in one language as a written text in another, in other words the same semiotic context, or, in the case of interpreting, spoken text in spoken form. However, in interlingual subtitling spoken language in a particular language is rendered as written language in another language. Therefore it is not only the language that changes, but also the semiotic system through which it is represented, albeit within the same overall semiotic system of the film or television text. The result is diasemiotic or diagonal translation, as opposed to the traditional mono-semiotic context (Gottlieb, 1997:135).

In addition to the increased complexity involved in rendering text in one semiotic system as text in another semiotic system (spoken to written), the subtitler also has to ensure that the subtitle works within the semiotic context of film or television which

involves visual and audio signs. The semiotic context implies that non-audio verbal elements, such as signboards, should also be translated for the benefit of the viewer. The subtitler can only be sure that the subtitles work by taking the intended viewer group into consideration. The semiotic context of subtitling for viewers with impaired hearing requires that non-linguistic audio elements, such as sound effects, be included in the subtitle.

Once prospective subtitlers realise that it is impossible for them to render audio language verbatim in their subtitles, there is a danger of over-condensing. This results in a watering down of the content of the source text by representing in the subtitles only what the subtitlers consider to be important. The result is a subtitled version of a television programme or film which does not pack the same punch as the original. Over-editing has also been shown to make subtitled programmes harder to understand by not rendering subtle nuances, having been considered superfluous by the subtitler, yet creating gaps in viewer comprehension (Jensema *et al.*, 1996:284-5).

The aim is to produce a qualified subtitle which has the same meaning-potential as the source text. In order to achieve this, the subtitler should continuously ask whether the subtitle plus the semiotic elements of the film or television programme that are accessible to the average intended viewer of the subtitled text will have the same impact as the original text would have on the average viewer for whom it was intended.

In order to be able to achieve this outcome, the learner must have acquired the following knowledge and skills:

- **Knowledge**

The learner should have a general understanding of the semiotic context of television and film, including basic theory related to this. In addition to this, the learner should also have knowledge of special semiotic needs of potential viewer groups, such as viewers with impaired hearing. Finally, the learner should be familiar with the semiotic model for the creation of qualified subtitles, as opposed to more reductionist models that emphasise condensing at the expense of equivalence.

- **Skills**

The learner should be able to create subtitles that take into account the semiotic context of film and television. Furthermore, s/he should demonstrate the ability to adapt subtitles according to the semiotic requirements of intended viewer groups.

Lastly, s/he should be able to create subtitles that have a meaning-potential as equivalent as possible to that of the original source text.

It is important to remember that realisation of the meaning-potential of the original sign in the subtitle should take place within the context of readability.

3.3.1.3 The student must be able to shape titles for optimum readability.

Subtitling theory has established certain guidelines for effective subtitling to promote readability. These guidelines are the result of decades of subtitling in countries where this method of audio-visual language transfer is firmly established, either resulting from, or having been tested through, research.

One of the most important factors that determine readability is reading speed. Average subtitling reading speeds in developed countries is around 140 words per minute (ITC, 1999:11; Jensema, McCann & Ramsey, 1996: 284). As a rule of thumb, six seconds are allowed for the reading of a full two-line title (approximately 70 characters). It is important to bear in mind that this is the rate of subtitling for predominantly literate viewer populations, and that the viewer population in South Africa is more heterogeneous. The heterogeneous nature of the South African viewer population will require a range of reading speeds, and this will be discussed in more detail under 3.1.2.

A second important aspect of subtitle readability is text distribution. The segmentation of a sentence over the two available lines per title, or even over more than one title, is done according to certain guidelines. Text distribution can either enhance or hinder readability, depending on the extent to which meaningful text units are created. This is very important in subtitling, as the reader does not have the opportunity to refer back to text that has already been read. Furthermore, the subtitler is limited as to the number of titles that a sentence can be spread over, since the viewer has to store incomplete sentences to short-term memory while reading the subsequent title(s) to complete the sentence. This increased mental activity could have an adverse effect on the readability of a title.

Other aspects of readability include abbreviations, the use of non-standard linguistic forms and punctuation. The use of abbreviations and non-standard linguistic forms in subtitles both have a negative impact on readability due to their relative unfamiliarity, although there are circumstances where they are desirable. Punctuation is generally kept to the minimum required for clarity, and some punctuation marks have special meanings in subtitling, such as the en-dash at the beginning of a line to indicate alternating speakers.

In order to be able to achieve this outcome, the learner must have acquired the following knowledge and skills:

- **Knowledge**

The learner should be able to demonstrate an understanding of the way in which reading behaviour impacts on segmentation and text distribution in subtitling, as well as the effect of abbreviations and non-standard linguistic forms on the readability of subtitles. Furthermore, s/he should have knowledge of the use of punctuation to promote readability in subtitles, as well as punctuation conventions peculiar to subtitling.

- **Skills**

The learner should be able to demonstrate an ability to shape subtitles that are easily readable through segmentation of text units and line breaks, and to ensure coherence between titles where sentences are spread over more than one title. Secondly, where the use of abbreviations and non-standard linguistic forms is required, this should be done in ways that do not detract from readability. Lastly, the general use of punctuation should enhance readability in accordance with the established conventions of subtitling.

Readability of subtitles is not only linked to the shaping of the individual titles, but also to the way in which a set of titles is cued in time, as will be shown in the next outcome.

3.3.1.4 The student must be able to cue rhythmically in accordance with the audio and visual components of the film or television programme.

The subtitler is not only responsible for shaping subtitles, but also for inserting them in the right place in the film or television programme. This means that as far as possible, the subtitle should be displayed concurrently with the textual element it represents. Although it is acceptable in subtitling to change the order of semantic units within a sentence to improve readability, this should never be done where it could result in a discrepancy between what is conveyed through the subtitle and another semiotic element, such as by providing the answer to a question whereas the speaker still has a puzzled expression on their face.

Furthermore, the titles should be inserted at a regular pace, following the speech rhythm on the audio. Rapid-fire, staccato speech will best be subtitled by shorter titles inserted at more frequent intervals to imitate the brisk pace of the audio. In the same way, flowing speech will be better represented by longer subtitles displayed at

a slower pace. Whatever the case, the subtitles should attempt to reflect the rhythm of the television or film audio.

In addition to respecting the audio rhythm of the film or television programme, the subtitles should also respect its visual rhythm. In order to do this, subtitles should respect cuts by not being displayed across them, especially in the case of hard cuts. Only under exceptional circumstances should these guidelines be breached, and then only in specific ways to minimise the disharmony created by the display of a subtitle across a cut.

New developments in subtitling technology are making it easier to pinpoint the exact frame where a subtitle needs to be inserted or removed, but it still requires a musical ear, visual sensitivity and good hand-eye coordination from the subtitler to be able to do this.

In order to be able to achieve this outcome, the learner must have mastered the following knowledge and skills:

- **Knowledge**

The learner should be able to demonstrate an understanding of the importance of the correlation between subtitle on the one hand, and audio and visual elements of the film or television programme on the other hand. The learner should have knowledge of appropriate places for the insertion and removal of subtitles, as well as ways of dealing with situations where this is not possible. Lastly, s/he should be able to demonstrate knowledge of ways of reflecting variations in audio rhythm in subtitles.

- **Skills**

The learner should be able to demonstrate the ability to create subtitles that respect the audio and visual rhythm of the film or television programme, including the accurate and harmonious insertion and removal of subtitles with the audio and visual rhythm of the film or television programme. S/he should also be able to demonstrate the ability to reflect variations in audio rhythm in subtitles.

3.3.1.5 The student must be able to condense text.

As discussed under 3.1.1, the interlingual subtitler needs to be able to produce a high standard of translation in the subtitle. Likewise, intralingual subtitlers need to be able to produce a faithful version of the original text in the subtitle, albeit in the same language. Neither of the groups is able to use verbatim transcriptions, as the spatial and temporal constraints of subtitling do not allow for this. The test for a qualified

subtitle is whether it packs the same punch within the semiotic context of the film or television text as the original text (3.1.2).

However, all too frequently, the spatial and temporal constraints of subtitling lead to an eroding of the source text through indiscriminate condensing. In these instances, the formal aspects of the subtitle (duration, layout, and readability) supersede contents and meaning in importance. This not only results in an impoverished version of the source text, but also impacts negatively on viewer comprehension by leading to gaps in understanding.

Bearing in mind that condensing poses some very real threats to the subtitler in obtaining equivalence in meaning-potential between source text and subtitled text, the fact remains that a reduction in volume is required from source text to subtitled text. This is also the case for language pairs where there would normally have been an increase in volume due to translation. Therefore, subtitlers need to be able to condense text without adversely affecting the meaning-potential ratio between the source and target texts.

One of the shared components of subtitling courses is that they all teach the art of condensing. The aim of this component is to make condensing as invisible as possible by not impacting unduly on the meaning-potential ratio. These strategies involve substitution (the use of pronouns or shorter synonyms), but also deletion (certain types of repetition or some features of natural speech).

In order to be able to achieve this outcome, the learner must have acquired the following knowledge and skills:

- **Knowledge**

The learner should be able to demonstrate understanding of the temporal and spatial constraints of subtitling. In addition to this, s/he should have knowledge of strategies used in condensing, such as substitution and deletion. Of the utmost importance is an understanding of a subtitling model for maintaining the meaning-potential ratio while condensing.

- **Skills**

The learner should be able to shape titles according to the temporal and spatial constraints of subtitling, including the use of substitution and deletion strategies to reduce the source text in volume. Furthermore, s/he should be able to demonstrate the ability to create subtitles that adhere to the temporal and spatial constraints of subtitling without eroding their meaning-potential.

Subtitles are often subject to intense scrutiny from the viewing public because the source and target texts are available simultaneously, thereby facilitating comparison. The concurrence of the source and target texts means that errors in subtitling are more visible than in other types of translation where the source text is not readily available.

As part of their training, prospective subtitlers should be required to evaluate sets of subtitles critically in terms of subtitling theory. This should include subtitles by professionals, their peers, and their own subtitles.

It is of particular importance for prospective subtitlers to be able to suggest improvements where the quality of a set of subtitles is not up to standard. In their own work, this will enable them to edit their titles to produce work of an increasingly professional standard.

In order to be able to achieve this outcome, the learner must have mastered the following knowledge and skills:

- **Knowledge**

The learner should be able to demonstrate a thorough understanding of subtitling theory and internationally accepted subtitling standards, especially the *Code of best subtitling practice* (Ivarsson & Carroll, 1998). In addition to this, s/he should also be able to demonstrate insight into her/his own thought and learning processes.

- **Skills**

The learner should be able to demonstrate competence in critiquing a given set of subtitles according to internationally accepted subtitling standards, particularly by applying the *Code of best subtitling practice* (Ivarsson & Carroll, 1998). Based on this critique, s/he should be able to suggest improvements to any set of subtitles, including their own, where internationally accepted standards are not met. Lastly, s/he should be able to proofread and edit own and others' subtitles for broadcasting.

Whereas the first general outcome and its specific outcomes reflect the importance of existing subtitling theory and acceptable international practice, the second general outcome and its specific outcomes are specifically concerned with the localisation of subtitling for the South African context. These two components, existing international know-how for subtitling and subtitler training, and the need to adapt and expand this to suit the South African situation, form the cornerstone of the curriculum outline. The next section will discuss the general outcome and its specific outcomes in more detail.

3.3.2 The student must be able to address the subtitling needs of specific user groups in the South African context.

3.3.2.1 The student must be able to subtitle for varying reading speeds according to the needs of particular user groups.

As mentioned in the previous section, most existing subtitling theory has been formulated in developed countries. South Africa, on the other hand, has been classified as a developing country since 1997 (Ministry of Environmental Affairs and Tourism, 2004). Apart from the economic differences between developed and developing countries, there are also marked differences in social development between the populations of developed and developing countries, notably in terms of literacy. This means that the viewer population and the national context of subtitling in a developing country will be different to that of a developed country.

For this reason, it is not enough for subtitlers in South Africa to be trained in established subtitling theory that has largely been formulated in developed countries. Whereas adult viewer populations in developed countries are predominantly homogeneous in terms of literacy, this is not the case in South Africa. Approximately half of the adult population in South Africa is functionally illiterate, whereas the other half ranges from semi-literate to highly literate.¹³ These varying levels of literacy in the viewer population place distinct demands on the subtitler, because the function of subtitling for the various groups will be different.

Intralingual subtitling for viewer groups at the lower end of the literacy scale could be used to improve literacy levels. However, in order for this to be successful, the reading rate required from the viewers should be significantly lower than that required of highly literate viewers. In addition to this, there needs to be a strong phoneme-

¹³ In spite of official claims to the contrary, the present illiteracy rate in South Africa is estimated to be close to what it was in 2001 when an official survey indicated that more than a third of the population of 16 years and older were illiterate (Macfarlane, 2005).

grapheme correlation between the audio and subtitle with as little substitution and deletion as possible. The implication of this is that the overall pace of material that is suitable for subtitling to improve literacy levels should be fairly slow. Other viewer groups that may require a reduced reading rate are children and those with impaired hearing.¹⁴

On the other hand, subtitlers should also be able to subtitle for viewers in the middle of the literacy spectrum, and for highly literate viewers. The more literate the viewers, the higher the reading rate is and the less need for condensing. Jensema and Burch (1999:6) have found that viewers are able to follow subtitles of up to 220 words per minute for short periods of time. Although less condensing is required because of the greater number of words per minute available, this type of subtitling places different demands on the subtitler, particularly because it is normally required in material that is fast-paced, possibly with blurred sounds or unclear enunciation. Nevertheless, subtitlers should also be able to deal with this end of the reading-rate spectrum.

In order to be able to achieve this outcome, the learner must have mastered the following knowledge and skills:

- **Knowledge**

Learners should be able to demonstrate knowledge and understanding of the national context of subtitling, specifically the needs to be addressed by subtitling in South Africa. They should also be familiar with ways in which subtitling could be used to achieve these aims. In addition to this, the learner should be able to demonstrate knowledge of the demographics of the viewer population, specifically the needs of various viewer groups in terms of reading speed.

- **Skills**

The learner should be able to demonstrate competence in the creation of subtitles that assist in the achievement of social or language-political aims for the implementation of this form of audio-visual language transfer. Furthermore, the learner should be able to describe the user needs of various groups in the viewer population, specifically the appropriateness of a particular reading speed for a specific user group. Where this information is unavailable, the learner should be able to conduct research in order to establish user need profiles. The learner should also be in a position to advise broadcasters and production houses on the suitability of

¹⁴ See also De Linde and Kay (1999:11).

material for subtitling to achieve specific aims, such as the improvement of literacy levels.

Apart from raising literacy levels, social and language-political aims for subtitling in South Africa also include improved access to information for marginalised groups, such as viewers with impaired hearing. The next specific outcome deals with this.

3.3.2.2 The student must be able to present verbal and non-verbal aspects of the audio in accordance with the needs of particular user groups.

Another difference between subtitling in developed countries and what is envisaged in South Africa is that developed countries normally have specialised subtitling for viewers with impaired hearing. This is because of the distinct needs of this particular viewer group, notably the need to have non-verbal audio elements, such as sound effects, also represented in the subtitle.

In South Africa, very little is currently available on national television for viewers with impaired hearing, despite the fact that they are charged a full fee for their television licenses. In the absence of a separate subtitling service for viewers with impaired hearing, subtitles should be made as accessible as possible to them, especially for prime time viewing. This will require an ability on the part of the subtitler to focus not only on the verbal elements in the audio, but also non-verbal elements.

An additional challenge to subtitlers in South Africa will be to minimise the intrusion of representing sound effects in subtitles for those viewers who do not suffer from impaired hearing and who use the same set of subtitles. For these viewers, this information will be superfluous and could lead to irritation, unless a system is designed to minimise intrusion. At present, no such system exists but prospective subtitlers could be asked to assist in the development of such a system, especially since subtitling in South Africa is still in its infancy.

In order to be able to achieve this outcome, the learner must have mastered the following knowledge and skills:

- **Knowledge**

The learner should be able to demonstrate knowledge of the subtitling needs of viewers with impaired hearing. Furthermore, s/he should have knowledge of conventions used to convey sound effects and other non-verbal elements of the audio.

- **Skills**

The learner should be able to demonstrate skill in the creation of subtitles that reflect non-verbal audio elements of the audio. In addition to this, s/he should demonstrate an ability to contribute to the creation of a set of codes that represent non-verbal audio elements, while minimising intrusion. Lastly, the learner should be able to describe the user needs of viewers with impaired hearing, and where this information is unavailable, conduct research to establish a user need profile for this group.

In order to assess whether the learners have in fact achieved the stated outcomes during the course, both formative and summative assessment should be done. In the breakdown of knowledge and skills above, it is clear that there is a large number of components that can initially be assessed on paper, with the exception of cueing (3.1.4). However, it is important to bear in mind that the final product of a subtitler is a professionally subtitled text, and although theoretical knowledge forms part of this, the weighting of assessment tasks should reflect the significance of practical skills, including cueing.

3.3.2.3 The student must be able to contribute to the promotion of multilingualism in South Africa through the creation of subtitles

Research has shown subtitling to be effective in enhancing non-L₁ language acquisition. Both interlingual and intralingual subtitling could play a vital role in the promotion of multilingualism. Interlingual subtitling is useful in exposing viewers to two languages simultaneously, providing them with the same content in different languages. By being exposed to both languages at the same time, the viewer relies on proficiency in one of the languages to infer meaning for utterances in the other language. Depending on the level of knowledge in the non-L₁ language and the exposure period, the viewer may be sensitised to the non-L₁ language, thereby paving the way for future acquisition, or actually experience a raised level of proficiency, such as extended vocabulary or better understanding of the orthography.¹⁵ Intralingual subtitling is useful in presenting viewers with the same content in the same language, but in audio and written format, thus reinforcing knowledge of the orthography for both L₁ and non-L₁ viewers. In this sense, subtitling could also be used to promote standardisation of orthographies that are still being firmed up.

Olivier (2003:105-6, 114, 115) discusses various ways in which subtitling could be used to promote multilingualism in South Africa. These include bilingual subtitles,

¹⁵ For more information on incidental language acquisition as a result of watching subtitled television, see also Van de Poel & d'Ydewalle, 2001.

multilingual subtitles and pivot subtitles. He also makes a case for the harmonisation of related languages, stating that subtitling provides a unique opportunity for this.¹⁶ Nevertheless, he also points out that the conjunctive, disjunctive or ultra disjunctive nature of each of the eleven languages respectively, also present their own challenges. Two of the most notable challenges in this regard relate to segmentation and volume in the conjunctive language where a significantly greater number of characters is often required when translating into these languages, especially where these characters form one word.

In order for subtitling to be used effectively as a means of promoting non-L₁ language acquisition, the learner must have mastered the following knowledge and skills:

- **Knowledge**

The learner must be able to demonstrate a thorough understanding of the ways in which subtitling can be used to promote non-L₁ language acquisition. The learner must also be able to demonstrate a comprehensive knowledge of the South African language scene and related policies. Lastly, the learner must demonstrate an in-depth knowledge of the orthography of their target language, and the ways in which subtitling could be used to promote standardisation.

- **Skills**

The learner must be able to produce subtitles that promote non-L₁ language acquisition, whether interlingual or intralingual. The learner must also be able to create subtitles that will assist with standardisation of the orthography of the target language, in areas where standardisation may be required.

3.4 Conclusion

The curriculum outline for the training of subtitlers at a South African university proposed in this chapter is based on existing subtitling courses in developed countries, but has been adapted to address user-based needs that are unique to South Africa as a multilingual developing country. The two general outcomes are that students must contribute to the establishing of subtitling as a means of audio-visual language transfer in South Africa in terms of internationally accepted standards and

¹⁶ Harmonisation of languages is a relatively contentious topic among specialists in language planning, development and policy in South Africa. The scope of this article does include an evaluation of this strategy, and it is simply mentioned as an example of one of a range of possible applications for subtitling in the promotion of multilingualism in South Africa.

consistency, and that they should be able to address the subtitling needs of specific user groups in the South African context.

As a literature basis for their course work, students will use a practical guide to subtitling, but also articles on the nature of subtitling, the political implications of subtitling, subtitling as a means of providing access to information for viewers with impaired hearing and non-L₁ viewers, the use of subtitling to raise literacy levels and language proficiency, the use of a semiotic framework for the creation of subtitles, and material on the South African language-political situation, such as Olivier (2003).

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In order for a South African subtitler training programme to yield graduates that will be able to address the user-based needs of the country, it is imperative that these graduates have a thorough grounding in existing subtitling theory, and an in-depth knowledge of social and language-political needs in the country that may be addressed through subtitling and the ways in which this could be done. At the same time, these graduates will need to be skilled in the practical components of subtitling to be more than “arm-chair subtitlers”. For this reason, the knowledge and skills components in the curriculum outline are inextricably linked. This chapter postulates that the optimal training environment for subtitlers in South Africa is a university that allows for education and research, in conjunction with a subtitling centre that will provide the opportunity for practical experience in subtitling.

¹⁷ In addition to commercially available subtitling guides, it is also worthwhile looking into in-house developed material by other training institutions, such as the SBS Style Guide (McLennan, 2000), Subtitling Manual (McCormick & Coupe, 2002) and Closed Captioning Guidelines (McLennan, 2001).

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The creation of interlingual subtitles: semiotics, equivalence and condensation.

Perspectives guidelines for authors
are included as Addendum C.

The article has been reworked significantly within the context
of subtitler training in South Africa
and in the light of recent contributions
to the discussion of equivalence and condensing in subtitling theory.

CHAPTER 4: A SEMIOTIC MODEL TOWARDS THE INTEGRATION OF THEORY AND PRACTICE IN SUBTITLER TRAINING

4.1 Introduction and problem statement

Condensing is an integral part of subtitling, but the danger exists that this may lead to a reductionist approach where only so-called relevant aspects of the source text are represented in the target text, instead of attempting to deploy the full meaning-potential of the original sign in the subtitles. Irena Kovacic (1995:235) states that

[t]he 'condensation' procedures are usually wrapped in a cloud of mystery. When asked about their approach to reducing the text of the original, subtitlers are very evasive. They say their choice is led by their feeling "of what is more important", but how they determine this, remains unclear.

Gottlieb (forthcoming:20) is of the opinion that

the deletion or condensation of redundant, oral features is a necessity when crossing over from speech to writing [although] **subtitles are often condensed beyond this point** [emphasis added].

As with general translation theory, there are two contrasting views on equivalence in subtitling, namely that it is the ultimate goal of the activity (subtitling or translation), albeit unattainable, or that it is unattainable and that the activity should therefore be defined in terms of other output characteristics, such as readability or relevance.¹⁸

In the absence of a model attempting to balance equivalence and condensing in subtitling, it seems inevitable that temporal and spatial constraints will lead to condensing receiving the greater focus, to the detriment of equivalence. Gottlieb (2004:21) identifies colloquialisms, slang, cursing, pragmatic particles and repetitions as linguistic elements that are typically lost in condensing. Significantly, he points out that

it is obvious that the trimming of the discourse through the elimination of such features in translation not only leads to quantitative reductions; it is also instrumental in *normalizing* the text by presenting the target-language audience with a version less non-standard than the original. [...] The time and space constraints of subtitling are often just an easy excuse for leaving out 'controversial' elements of the original dialogue (Gottlieb, 2004:21).

¹⁸ See also Kovacic (1994).

Clearly the equivalence-condensing dilemma is not confined to the South African subtitling context, although just as relevant to subtitlers here as elsewhere. In view of this, the current chapter is aimed at the South African subtitler training environment, as well as participation in the international equivalence-condensing debate in subtitling circles. It is postulated that the introduction of a model for the balancing of equivalence and subtitling in the training of subtitlers will act as a counter-balance for the over-emphasis of condensing. By providing students with a semiotic model for the attainment of equivalence in the creation of subtitles, they are equipped with an alternative to relevance as a subjective and arbitrary tool in condensing. Instead, relevance is replaced by the standard of maximum deployment of meaning-potential. South Africa is in the fortunate position that subtitler training is still in its infancy. As such, there exists an opportunity to include this model as a keystone of subtitler training, thereby avoiding the pitfalls of a one-sided focus on condensing.

Translation proper involves passing from one language to another, mostly in the same mode (written to written or oral to oral).¹⁹ Subtitling, on the other hand, involves passing from spoken language to written language, which consistently requires a substantial amount of textual condensing. Within this framework, interlingual subtitling can therefore be classified as a form of translation (passing from one language to another), although it is also distinguished from translation proper by certain unique characteristics, most notably the amount of condensing involved. However, as with translation proper, the expectation is that there will be a certain degree of sameness or shared identity (equivalence) between the translation and the source text (cf. Gottlieb, forthcoming:3). In short, a qualified interlingual subtitle, although subject to temporal and spatial constraints that do not apply to translation proper, should have the same effect on the non-L₁ viewer that the sum of the original film elements would have had on an L₁ viewer.²⁰

The temporal and spatial constraints imposed by the film or television text on translation in interlingual subtitling, makes it tempting to exempt these subtitles from the requirement of equivalence. This is because it would be much easier to condense, retaining just the essence of what is being said, rather than to condense while still deploying the full meaning-potential of the original utterance. However, approaching the problem from a semiotic point of view facilitates the attainment of maximum equivalence **in spite of** condensing.

¹⁹ See Gottlieb (2004) for a detailed description of the diasemiotic nature of subtitling.

²⁰ Although this chapter is primarily concerned with the achievement of maximum equivalence in interlingual subtitles, this model could be adapted for intralingual subtitling by redefining the object and sign within the semiotic context of intralingual subtitling.

The aim of this chapter is to address equivalence in the creation of interlingual subtitles in spite of condensing, and the specific benefits a semiotic approach has to offer in this regard.

It will be argued that a description of the process involved in the creation of interlingual subtitles should take into account both equivalence and condensing. In the first place, the chapter will offer a brief description of existing subtitling theory. It will then proceed to investigate the value of a **semiotic approach** to the study of interlingual subtitles.²¹ Thirdly, it will provide a summary of the concept of **equivalence** as seen in translation theory (semiotic and non-semiotic).²² Current translation theory (in particular Dinda L. Gorlée's Interpretative Semiotic approach) will then be extrapolated to a theory for interlingual subtitling that makes provision for the attainment of maximum equivalence in spite of condensing.

4.2 Existing subtitling theory

Henrik Gottlieb (2000) provides very solid groundwork for any study on subtitling with his bibliography of subtitling, which contains hundreds of works spanning a period of more than 70 years. The works cited address various aspects of subtitling, such as the history of subtitling, the creation of subtitles, criteria for subtitles, the politics of subtitling, reading behaviour, interlingual subtitling within the framework of translation theory, condensing, and so forth.

Another way of dividing existing subtitling theory would be to distinguish between prescriptive and descriptive theory. This phenomenon is not unique to subtitling, but also occurs in translation theory in general, although the shift in translation theory seems to be from prescriptive to descriptive theories:

In recent decades [the] assumption that translation theory exists to devise normative rules for translators to follow, has increasingly come under fire, and a number of theorists have attempted to talk about translation in non-prescriptive ways (Robinson 1998:161).

This shift does not seem to be as advanced in subtitling theory as in translation theory. A significant part of subtitling theory used in coursework is still concerned with the formal norms for subtitling output, such as the number of lines or characters to be used, the segmentation of phrases, the handling of expletives, and so forth. Although these aspects are undoubtedly important and an integral part of subtitling and subtitler training, it does presuppose a rather mechanical view of the art of subtitling,

²¹ See also Stecconi (1999), Gottlieb (2004).

²² See also Halverson (1997) and Pym (2000).

namely that good subtitles can be created by adhering to these norms. However, in subtitling the whole is infinitely more than the sum of the parts, and these prescriptive theories do not as much provide a solid theoretical framework for the creation of subtitles, as a check-list of the formal features of subtitling.

Descriptive subtitling theory, on the other hand, has attempted to describe the subtitling process by asking questions like “What happens when we subtitle?” and “How is a subtitle received by the viewer?”.²³ An example of this is Gottlieb’s theory of subtitling as diagonal translation (Gottlieb 1997:107, 1998:246) which holds that subtitling is both synchronous and non-synchronous, the reason being that although subtitles are prepared (created) in advance by the subtitler, the responder (viewer) receives them simultaneously with the original version or source text. The implication is that theoretically the viewer always has access to the source text (given that s/he understands the source language and can hear the soundtrack), which both heightens the authenticity of the subtitled text, and adds an additional constraint in the sense that the subtitler has to function within a situation where her/his work can be compared to the original at any given moment. This is an important contribution to descriptive subtitling theory, because it brings to light the fact that subtitling involves more than merely functioning within certain formal constraints. It emphasises the dynamic and interactive nature of subtitling and the demands placed on the subtitler.

Another valuable contribution by Gottlieb is his view of subtitling as taking place within a polysemiotic framework (Gottlieb, 1997:141), and defining it as

- a. **prepared** communication
- b. using **written** language
- c. acting as an **additive**
- d. and **synchronous** semiotic channel
- e. as part of a **transient**
- f. and **polysemiotic** text.²⁴

This definition takes into account the fact that subtitling involves more than one semiotic system, and the fact that the total communication situation (or sign, in semiotic terms) should come into play in the creation of subtitles. It is therefore also important to create an acute awareness of this communication situation in prospective subtitlers during training. In his latest work, Gottlieb addresses the issues

²³ Irena Kovacic’s Thinking-aloud experiment in subtitling (1995) is an example Of this.

²⁴ Also see Hofstadter (1997:159), and Gottlieb (1998:245).

of reduction and fidelity. Although he posits that the diasemiotic nature of subtitling makes fidelity unattainable and that “we [may have to] settle for something less”, he nevertheless attempts to analyse factors that contribute to this lack of fidelity to promote a greater awareness of these forces at work (Gottlieb, 2004:18; forthcoming:3).

4.3 Substantiation for a semiotic approach

Although semiotic subtitling theories such as that of Gottlieb and Reid (1987) contribute to the equivalence-condensing debate, condensing is still given preference, with equivalence seen as a noble but unattainable goal. This chapter will posit an alternative view by using semiotics as a point of departure, and notably the branch of semiotics referred to as Interpretative Semiotics.

Semiotics is the study of systems of signification.²⁵ Both language and film can be considered as systems of signification because they are used to convey meaning. Semiotics has been used with much success to study both translation and film. Susan Bassnett is of the opinion that “although translation has a central core of linguistic activity, it belongs most properly to *semiotics*” (Bassnett 1991:13).

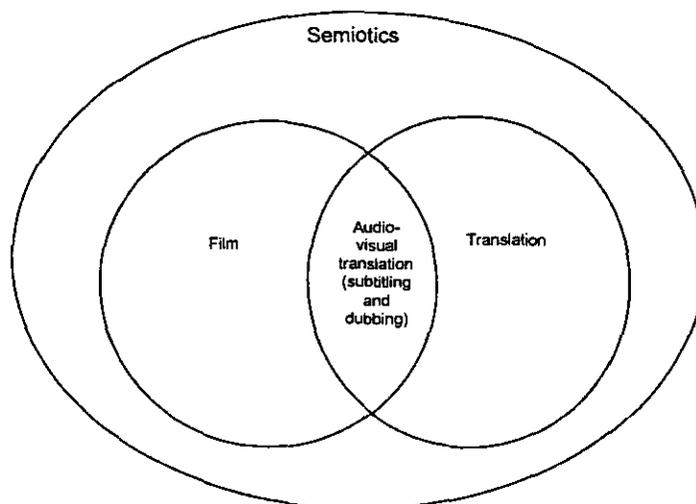


Figure 4.1 Audio-visual translation in the field of semiotics

²⁵ Although this chapter does not enter into highly technical discussions on semiotics, it presupposes a rudimentary knowledge of this discipline. A good starting point for the uninitiated is Chandler (1994), Cobley (1999) or Johansen and Larsen (2002).

Audio-visual translation (including interlingual subtitling and dubbing) occurs at the interface of translation and film (see Figure 4.1) and semiotics is therefore eminently suited to the study of subtitling itself.²⁶ Subtitling involves the passing from one particular semiotic system to another on more than one level: it is a passing from one language (semiotic system A) to another language (semiotic system B), but also from spoken language (semiotic system a) to written language (semiotic system b).

The semiotic approach to the phenomenon of translation is relatively well-established, and it is postulated that this approach will be helpful in addressing certain aspects of interlingual subtitling related to translation, notably equivalence. However, from the perspective of film semiotics, it will also provide us with a framework for the evaluation of the subtitle within the bigger context of the film or television text-sign (including the temporal and spatial imposed by such texts).

The following section is an attempt to situate the semiotic approach to translation within the larger framework of existing translation theory, to determine in what way this could contribute to the question of equivalence in subtitling.

4.4 Semiotics in translation studies

As we have already seen, translation theories that are normative (or prescriptive), are being replaced by theories that are more descriptive in nature. According to Douglas Robinson (1998:161)

due to the ingrained nature of normative thinking about translation, however, this is easier said than done. Several different systems approaches to translation have been developed, attempting to trace in detail the process of translation, to describe how translators actually translate, rather than telling translators how they ought to translate.²⁷

This chapter will therefore not concern itself any further with normative or prescriptive approaches to translation, but will investigate descriptive theories, specifically the philosophical descriptive translation theory in the work of Dinda L. Gorlée. Gorlée's work is a reaction against other descriptive theories of translation, for example the historico-descriptive approach of Gideon Toury (1995). Toury holds that translation takes place in a "black box" and that the only way of understanding the process is by comparing input (what goes into the black box) to output (what comes out of the black box). Based on this, he describes translation as a process that involves

²⁶ Although dubbing also constitutes a form of audio-visual translation, and as such requires equivalence, it is very different to subtitling as it does not require the same amount of condensing.

²⁷ For a systems approach to subtitling, see Karamitroglou (2000).

identifying the relevant features in a source text and rendering these in the target language. Gorfée describes this approach as “a dangerous and indiscriminate weapon [d]ue to the fact that it may have either an ideological or an intuitive bias, or both” (Gorfée, 1994: 185). In its place, Gorfée proposes a translation model that aims at explaining the transformation process from source text to target text and the quest for maximum equivalence, based on Interpretative Semiotics. This brings us back to the everpresent debate of equivalence in translation (including interlingual subtitling) and whether it is a valid goal, albeit unattainable, or whether it should be acknowledged as unattainable and relegated to a position of lesser importance or irrelevance.

4.5 Equivalence

According to Peter Newmark (1991:3) it is “a common academic dead-end pursuit” for translators to try to define equivalence (cf. Halverson, 1997; Pym, 2000).²⁸ Equivalence is an aspect of translation studied by all approaches to translation studies (although not all call it equivalence). It has been studied from non-semiotic and semiotic points of view, but the semiotic approach sets by far the highest standard for equivalence by exacting the **full deployment of the meaning-potential of the original sign** (source text) in the new sign.

Whichever way one looks at the question of equivalence, it is impossible to discuss translation without employing a term that refers to the degree of ‘sameness’ between source and target text. In the absence of this quality, there would be no translation.²⁹ Bassnett describes equivalence as that which “results from the relation between signs and what they stand for, and the relationship between signs, what they stand for and those who use them” (Bassnett, 1991:27). Therefore, as a working definition for the purpose of this study, equivalence will refer to the sameness of effect of signs in the source and target texts on the groups for which they are intended.

Although admitting that it might be a gross oversimplification of the facts, Gorfée describes the traditional (that is non-semiotic) view of equivalence as one where the “original text and translated text are ideally placed in a one-to-one correspondence, meaning by this that they are to be considered as codifications of one piece of information, [and therefore] as logically and/or situationally interchangeable” (1994:170). However, she points out that this is a dangerous misconception, as it implies that the back-translation of a “good” target text will yield a text that is identical

²⁸ Back-translation is a test that is often applied to determine the degree of equivalence between source and target text. See also Newmark (1991).

²⁹ See also Gorfée (2004) for a discussion of the what constitutes translation.

to the original source text and valid for all times.³⁰ Goriée bases her rejection of this idea on the work of Charles S. Peirce (1931-1958) for whom

equivalence was synonymous not with one-to-one correspondence, as in Firstness (iconicity) and, in a different modality, in Secondness, but with the one-to-many correspondence that obtains whenever a sign “gives birth” to an interpretant (or rather a series of interpretants). Two signs which are this dynamically equivalent can be logically derived from one another. (Goriée, 1994:173)

The lack of one-to-one correspondence for translation and subtitling implies that there is more than one possible translation or subtitle for any given text. The text as sign can be interpreted in more than one way, although one should be able to see the link between object, sign and interpretant clearly. This link can be tested by back-translating the target text. Although it is unlikely that it will be identical to the original source text, the back-translated text should bear a strong **resemblance** to it. The presence of this degree of sameness can be interpreted as a form of equivalence.

Interpretative Semiotics identifies three types of equivalence, namely **qualitative**, **referential** and **significational** (Goriée, 1994:174-82).

- *Qualitative equivalence* refers to parity of external characteristics of the sign, such as the rhyme structure of a sonnet which might be the same in a translation of the sonnet.
- *Referential equivalence* refers to the immediate object and the dynamical object of a sign. The immediate object is the idea “called up directly by a particular sign-use” (Goriée, 1994:176). The dynamical object can only be understood by trying “to understand what is implied by the immediate object ... The dynamical object corresponds to the hypothetical sum of all instances of the sign-bound immediate object” (Goriée, 1994:177). One of the most important factors to remember when dealing with equivalence in translation is that the dynamical object of the primary sign and that of the translated interpretant-sign must always be the same, if the meaning of the two texts is to be considered the same. However, this does not necessarily mean that they will have the same immediate object. An example of this is idiomatic expressions in different languages where cultural factors are often strongly prevalent on a first level, such as the French idiom *avoir des fourmis dans la main*. Although the expression literally means (immediate object) “to have ants in one’s hand” the actual meaning is that that someone’s hand is

³⁰ See also Steccconi (1999) for a slightly different view on this.

asleep (dynamical object). Gorlée describes this specific aspect of equivalence as follows:

even if the primary sign [source text] and the translated interpretant-sign [target text] have different immediate objects, their dynamical objects will always need to be identically the same, at least ideally. Even their sameness is, however, relative, since it is to some degree always the result of an interpretation, of an inferential procedure [but] the relation between the two must be mediated by a semiosis which makes it possible for one to be a logical consequence of the other (Gorlée, 1994:178).

- *Significational equivalence* refers to the relation between the interpretant and the object, where “[t]he interpretant is supposed to indicate the same things or facts as the primary sign, and to signify these things, and assert these facts, in like manner” (Gorlée, 1994:181). According to Umberto Eco, Peirce sees the interpretant as “that which the sign produces in the quasi-mind which is the interpreter” (Eco 1976: 68).

Of these three forms of equivalence, the most important is undoubtedly signification equivalence, where the translation as interpretant-sign is expected to convey the same meaning in a like manner as the original sign. Factors such as different phonemic systems and cultural influences may make it very hard to attain equivalence on the qualitative or referential level, but signification equivalence is the one level of equivalence that will ensure a reaction or perception in the responder of the translation that is comparable to that of the responder of the source text.

Gottlieb (forthcoming:4) rightly identifies ‘fidelity triggers’ and ‘anti-fidelity factors’ that impact on equivalence. However, it is argued that although in practice they undoubtedly influence the degree of equivalence attained (or strived for), this could be attributed not so much to their pull, but to the lack of clarity regarding type of equivalence strived for. In other words, if signification equivalence is the object of subtitling, the degree of equivalence attained should not be the result of a “tug of war between fidelity and audience concerns” (Gottlieb, forthcoming:4). Instead, it should be the product of semiosis aimed at deploying the full meaning-potential of the source text in the target text. In this way, a translator may decide to deviate completely from the semantic meaning of the source text by creating a “new” target text but which is nevertheless significationally equivalent to the original. In doing so, the subtitler will shift her/his activities out of the realm of equivalence dictated by the fidelity triggers and anti-fidelity factors and into the realm of semiotic equivalence.

To conclude the section on equivalence in approaches to translation, as well as its associated problems, it is imperative to reiterate that “[e]quivalence, in the strictest sense, between sign and interpretant is logically impossible: it would stifle the growth of knowledge, which growth is exactly the point of sign production and sign use” (Gorlée, 1994:181). This process is never-ending and new significations are constantly generated, examined, accepted or rejected. It is therefore impossible to assume that this process would at some point come to a standstill, especially since culture and society (context) is constantly changing. Therefore, although this constant evolution means that a final interpretant (and therefore a final translation) can never be achieved, it remains the aim of the translator to achieve total knowledge of the meaning of a sign. To achieve this, one needs to persevere in making ever-new interpretations/translations of the sign, in order to gain access, via the sign and its immediate object, to the sign’s dynamical object.

4.6 A semiotic approach to the translation process³¹

According to Gorlée, translation in Interpretative Semiotics

at least in its lingual varieties, deals with signs interpretable by logical interpretants; it is a pragmatic process of making sense of intellectual concepts, or signs of Thirdness. (Gorlée, 1994:186)

Interpretants are the ideas that we form about objects or events or anything else that the world brings us into contact with. In translation terms, they are the phases that we go through in order to achieve the ideal equivalent. The first of these successive logical interpretants is the fleeting, tentative idea. In terms of a translation, it can be seen as an “impromptu translation” which is the result of the ideas immediately prompted by a text-sign in the trained translator’s mind, but which is “nevertheless a new sign susceptible of serving as a point of departure in the next semiosis” (Gorlée, 1994:187).

The second logical interpretant is described as “the dash of cold doubt that awakens the sane judgment of the muser” (Gorlée, 1994:187). During this phase, the translator evaluates the choices made in the first phase. The working hypothesis is tested, and re-worked, if need be, to create a better working hypothesis. The result is a possible solution to the translation problem.

³¹ See also Chesterman (1994) for a description of the translation process based on the work of Karl Popper, a description which is also philosophical descriptive and bears strong resemblance to Peirce’s approach to the process, although it is not a semiotic approach.

It offers at best a partial solution, one which works in the intended communicational situation and which makes sense (that is, is significant) in the target culture. But it may at worst be received in it with mixed feelings, shock or rejection (Gorlée, 1994:187). In the subtitling situation, this refers to the fact that “[t]here is always more than one answer to a (subtitling) question, but even more ‘solutions’ that miss target” (Gottlieb, 2004:19).

The third logical interpretant is the “near-perfect solution” (Gorlée, 1994:187) that signals the completion of semiotic activity. Although such a completion of semiotic activity is unlikely to occur, the “near-perfect solution” is the interpretant that renders the meaning of the original sign as fully as possible at a given moment. In translation terms, this is the translation that offers the best solution at a specific point in time. However, this translation can never be considered as the final answer and

[a] translation which would pretend to give final answers is [...] an alarming oxymoron, a sure sign that culture itself has, for instance by some irreversible catastrophic final event, come to an end (Gorlée, 1994:187-188).

Therefore, the translation process can be seen as cyclical, or more accurately, as a spiral. It will always refer back from the interpretant-sign (the translation) to the original sign (the source text), which will in turn give rise to a new, more appropriate interpretant, which will refer back to the original sign, and so on. This is because we live in a world that is constantly changing, and therefore our interpretation (and our translation) of the world is constantly evolving. However, this is also one of the major contributions of a semiotic approach to translation: the fact that it allows for this evolution and does not try to restrict the outcome of the process.

In describing the translation process, one inevitably has to define what the ideal outcome of the process is. The answer is, of course, the ideal translation. But what constitutes the ideal translation? From a semiotic point of view and in Peircean terms, it would be the point at which semiotic activity comes to a standstill. In other words, the stage where the ideal interpretant is found. The ideal interpretant is the interpretant which fully deploys the meaning-potential of the original sign, which is absolutely equivalent to it, thereby erasing any tension that might have existed between sign and interpretant and which could have given rise to renewed semiotic activity. In practice this is unattainable nevertheless it remains the ideal that is pursued.

Therefore, the aim of the translation process is to produce the final and complete interpretant with which all semiotic activities will come to a standstill. In view of the

fact that this is unattainable, the translation process can, as has already been mentioned, be seen as a spiralling movement between sign and interpretant in order to find an interpretant that is as close as possible to the sign. Although this final interpretant may eventually be very close to the sign, the semiotic process never comes to a complete standstill, because complete equivalence can never be attained.³²

4.7 A theoretical approach to the creation of subtitles

The question now arises as to what a theory for the creation of equivalent interlingual subtitles would look like from a semiotic point of view, and how this may contribute to the achievement of equivalence in spite of condensing.

In order to be able to address this question, it is in the first place necessary to remind ourselves that semiotics has already been used with great success to study both language-related phenomena (e.g. translation) and film. Semiotics is ideally suited for a study of these areas, because it does not confine itself to a specific discipline at a time, and can therefore be used to deal with interdisciplinary questions. Interlingual subtitling, as has already been mentioned, spans two disciplines namely film studies and translation. However, semiotics allows us to integrate these two disciplines into a coherent theory for the phenomenon of subtitling.

By way of introduction to the proposed theory for the creation of subtitles from a semiotic point of view, it is necessary to offer a brief summary of the elements of film in semiotic terms, namely:

- the *object* as the reality to which the film/television programme refers, the content that is conveyed;
- the *sign* as the film/television text or the visual and aural elements presented on-screen that are used to convey the content and the order in which this is done;
- the *interpretant* as the idea formed by the viewer of the object, i.e. how the viewer understands the content.

The intellection process, or understanding, of the film or television programme in semiotic terms is based on the fact that if the content is conveyed successfully by the director (thus, the sign is an accurate description of the object), and the viewer is literate as far as film or television signs and codes are concerned, the interpretant will

³² Although it may be impossible to attain the “final” or “ideal” meaning-potential of the sign, there is a distinct difference between this unlimited semiosis and the concept of *drift*. For a very enlightening discussion on this distinction, see also Eco (1994).

probably be close to the object, meaning that the semiotic process has succeeded. Thus, the intention of the producer of the sign (director) will be fully realised in the comprehension of the responder (viewer).

It is of more than academic importance for the subtitler to have a knowledge of film codes, for directors use specific codes, such as lighting, colour, cuts, and so forth, to convey meaning, and if it were not for these specific codes, film would not be film.³³ These are the codes that make up film and which distinguish it from other art forms. An understanding of these codes is necessary in order to be able to understand film. To give a concrete example of how a code can be implemented: music is often used to heighten suspense in a film or television programme. It is therefore a code that can be used by the director to tell her/his story. However, because this is such a well-established code, the director may decide to **break** this code for a refreshingly new approach and **not** use music, but rather silence, to heighten suspense at a given moment.

The previous paragraphs describe semiosis in a normal film situation. However, in a situation where interlingual subtitling is required, there is a short circuit in the semiotic process and intellection cannot be completed. The reason for this is that the sign cannot be interpreted by the viewer due to a linguistic barrier or insufficient knowledge of the source language, which partly or completely obscures the meaning of the sign. In other words, the *raison d'être* for interlingual subtitling is that it makes linguistic elements that form part of the sign understandable to the viewer who does not have a command of the source language, and it does so within the framework of the film or television sign as a whole. Only once this has been done can semiosis be completed, and can the viewer form an interpretant of the sign that is close to the intended meaning.³⁴

Therefore, in the non-L₁ film situation the basic semiotic elements (sign, object and interpretant) can be identified as follows:

- the object is a linguistic aspect of the film/television reality, i.e. dialogue, a song, and so forth;
- the sign is the language used to convey this;

³³ See also Monaco (1981) and Ivarsson & Carroll (1998) for a description of some of these characteristics.

³⁴ In the case of intralingual subtitling for viewers with impaired hearing, the semiosis comes to a standstill due to a physical disability which prevents access to parts of the information. The function of the subtitle remains to make this information available to the viewer, albeit slightly different information than what is required for interlingual subtitling.

- the interpretant is the idea formed by the viewer of the sign.

However, in view of the fact that the viewer's comprehension of the sign is limited due to a linguistic barrier, the sign needs to be translated for her/his benefit, which signals the entry of the subtitler between the original sign and the forming of an interpretant. The semiotic elements of interlingual subtitling situation will be as follows:

- the object is a linguistic aspect of the film/television reality;³⁵
- the sign is the language used to convey this;
- the interpretant is the idea formed in the mind of the subtitler about the sign;
- this interpretant gives rise to a new sign, namely the subtitle created by the subtitler to convey the meaning of the first sign (the interpretant formed in her/his mind) to the viewer who does not understand the source language;
- the final interpretant is the idea formed by the viewer of the object.

The process can be represented diagrammatically as follows:

³⁵ In intralingual subtitling, the object will be the aural reality of the film, and the sign will be the audio elements used to convey this. The analogy between the application of a semiotic model to both interlingual and intralingual subtitling for the attainment of equivalence should be clear from this and will not be further explicated in the chapter.

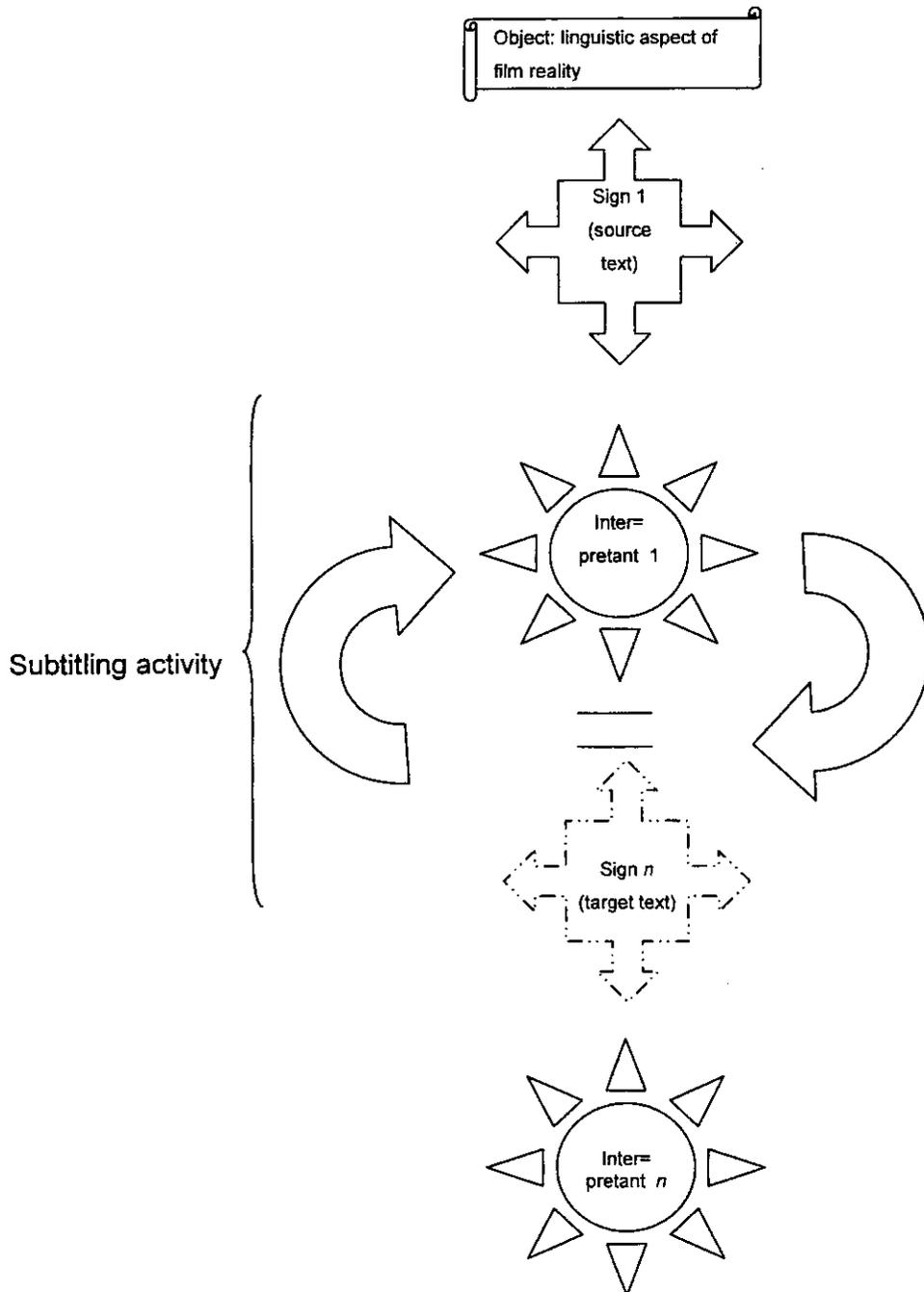


Figure 4.2 Semiotic view of the creation of subtitles

As can be seen in Figure 4.2, the object is a linguistic aspect of the film/television reality. Sign 1 is the linguistic aspect of the film/television text (source text), which is for all intents and purposes, largely inaccessible to the viewer because of a linguistic barrier. However, for the subtitler, whose function it is to make the original sign or source text accessible to the non- L_1 viewer, this gives rise to Interpretant 1. In Peircean terms, this would be the fleeting or tentative solution to the translation problem. However, this interpretant exists only in the mind of the subtitler at this

stage (it is an idea), and to make it accessible to the non-L₁ viewer, it has to be converted into a sign (subtitle) that is intelligible to the viewer. In this way, the subtitler creates Sign 2 which is not only an equivalent translation of the linguistic elements in the object, but which also adheres to the constraints imposed by the very nature of subtitling (notably condensing). If Sign 2 represents a full deployment of the meaning-potential of Sign 1, the only difference being that it is in a different language and within the spatial and temporal constraints imposed on subtitling, the semiosis can now be completed in the mind of the non-L₁ viewer. However, as we have seen with Peirce's classification of interpretants in the translation process, the first interpretant is normally an intuitive translation of the source text. This means that the first interpretant will have to be examined carefully, and the second interpretant is the result of the first interpretant being placed on the dissecting table to be evaluated, with changes made to render a translation that is closer to the original sign. In other words, the subtitler re-thinks her/his initial solution to the problem, probably by testing it in the context of the object (by looking at the specific film sequence to determine whether this subtitle will work). If the subtitle does not pass the test, it is reworked until it adheres to the criteria of equivalence and condensing. And so the process continues until the third interpretant (or fourth, or *n*th, depending on the number of times the process needs to be repeated to produce an interpretant that is for all practical purposes equivalent to the original sign), represents the end of semiosis, albeit temporarily (because the process can reignite at any time, a final solution can never be reached as solutions are valid only for the context within which they were formulated).

Therefore, by drawing on the Interpretative Semiotic view of equivalence in translation, it is possible to formulate a theory for the achievement of equivalence in the creation of interlingual subtitles. Instead of relegating equivalence in subtitles to an unattainable goal, the classification of interpretants into different categories and the route they follow to come progressively closer to the original sign, offer a useful tool for subtitlers who are concerned with deploying the full meaning-potential of the sign in the subtitle, rather than merely rendering a watered-down version of the original. It also takes into account the context, or the bigger sign, namely the linguistic element as part of the film sign and whether it works in this context, and not just on paper. This means that it not only aims at equivalence between subtitle and the original linguistic element, but also at functionality within the spatial and temporal constraints and whether sufficient condensing has taken place.

By describing the process and the desired outcomes of the creation of interlingual subtitles, this semiotic approach to subtitling also provides us with a device to measure the validity of a translation (or subtitle). This is so, because it postulates that the equivalent translation will be the one with which the semiotic process has come to a standstill, where the full meaning-potential of the original sign has been deployed. One can therefore apply the following test to the proposed translation/subtitle: does the semiotic process come to a standstill (has the full meaning-potential of the initial sign been deployed), within this particular context, with the solution proposed? However, as this is an unattainable idea, the answer will in all likelihood be that the *n*th interpretant is closer to the original sign than *n-1*, although the end of semiosis has not yet been reached. This will nevertheless represent a step in the right direction, and the subtitler will invariably have to decide at some point or another that a specific subtitle is a close enough rendition of the meaning-potential of the original sign at this specific point in time.

The test to be applied for a qualified subtitle boils down to a simple inversion of the semiotic elements in the process of semiosis. By this is meant that, in order to test the accuracy of the subtitler's interpretation of Sign 1, s/he should ask her/himself that if the interpretant formed in her/his mind were to be a sign, whether the original sign (Sign 1) could possibly be an interpretant thereof. In other words, the subtitler does a simplified back-translation test, bearing in mind that it is never infallible and will never produce a situation of one-to-one iconicity, but will at least give an indication of the validity of the proposed solution.

The end result of this process will be that, through checks and balances along every step of the way, the subtitler can be certain not to stray from the original sign, indeed to strive for the deployment of the full meaning-potential of the sign within the temporal and spatial parameters inherent to subtitling, thus giving due consideration to condensing. If this model is followed, an illusion could be created that the original semiosis in the film/television situation is taking place: object or linguistic aspect of the film/television reality, represented by a sign or the language used to represent it, will be understood by the non- L_1 viewer, who will form an interpretant in her/his mind that is close to the original sign. Of course, this process will have been facilitated by the subtitler, but if it is done in a way which is unobtrusive while deploying the full meaning-potential of the sign, a balance will have been struck between condensing and equivalence and it can be regarded as a qualified subtitle.

4.8 Conclusion

The chapter has ventured into uncharted waters by attempting to elaborate a theory for the creation of interlingual subtitles that makes provision for equivalence between subtitle and the original sign, an issue hitherto neglected in subtitling theory, presumably because of the centrality of condensing in the creation of subtitles. An over-emphasis on condensing may result in preference being given to brevity and clarity in subtitling, instead of equivalence between source and target text. In other words, if equivalence in subtitling does not receive the attention it deserves, it may be relegated to a second place, after temporal and spatial constraints. However, by adapting existing translation theory on equivalence, and notably the Interpretative Semiotic view thereof, it is possible to formulate a theoretical model for the achievement of equivalence in the creation of interlingual subtitles. The semiotic approach has the further advantage that it is able to deal with interdisciplinary phenomena, and can therefore accommodate both the translational aspects pertaining to interlingual subtitling, as well as aspects that are related to the film or television programme as such, notably the reading time available.

Within the context of subtitler training in South Africa, it is valuable to recognise from the onset that condensing should not be emphasized to the detriment of equivalence in interlingual subtitling. By equipping students with a semiotic model for the creation of subtitles theory is integrated into practice and subtitling students are being prepared for their work in a polysemiotic context. Although the last word on equivalence in interlingual subtitling has certainly not been spoken, it would seem that semiotics provides an invaluable and comprehensive approach to a problem that is central to this form of audio-visual translation.

CHAPTER 5: CONCLUSION

5.1 Summary of findings

The training of subtitlers in South Africa requires a multi-pronged approach if it is to be of a standard that is satisfactory to viewers and successful in the way in which it addresses social and socio-linguistic issues.

In order to achieve this, subtitler training needs to be firmly rooted in the practical applications of subtitling in a multilingual developing country, such as improved access to information for viewers with impaired hearing and non-L₁ viewers, raised literacy levels, the promotion of multilingualism and non-L₁ language acquisition. The study has attempted to do this by defining user-based parameters for subtitling in South Africa. These parameters included

- the compilation of user-group profiles,
- the use of appropriate reading speeds for various viewer groups,
- the inclusion of non-linguistic audio elements,
- the use of suitable language structures without unnecessarily editing them down,
- a strong correlation between audio (phoneme) and subtitles (grapheme) for subtitling that is aimed at promoting literacy,
- a very high standard of translation for interlingual subtitles, and
- the use of vocabulary appropriate for the intended viewer group.

In order to optimise resources, this study has attempted to show that there is some degree of overlap between the various user groups, but that the needs are sufficiently distinct to warrant their classification as independent user groups. This rules out the possibility of a generic set of subtitles that will simultaneously address the needs of all subtitle user groups.

The second challenge for subtitler training in South Africa is to deliver subtitlers of an international standard. Based on existing subtitler training in other countries, the study has identified a range of core aspects that shape subtitler training courses. It was found that courses range from strictly vocational to academic-theoretical, and that their position on the continuum was largely determined by the following aspects:

- the national context of subtitling,
- training aims,

- the academic level at which the course is presented,
- the course duration,
- course content,
- subtitling equipment or software used,
- on-the-job training or internships,
- entry levels and recognition of prior learning,
- the type of candidate envisaged for the course,
- the assessment of progress, and
- the (non) use of film and television scripts.

The challenge for South Africa is to reconcile these aspects to domestic user-needs in designing a subtitler training programme. The study postulates that a South African subtitler training course will need to train subtitlers that are well grounded in subtitling theory, empowering them to make an informed contribution to the establishing of subtitling as a new form of audio-visual language transfer in South Africa. On the other hand, subtitling graduates will also need to have a good command of the practical aspects of subtitling, enabling them to practise the art of subtitling at an internationally acceptable standard.

The curriculum outline for the tertiary training of subtitlers in South Africa proposed in this study attempts to achieve the above through general and specific outcomes. Each specific outcome is linked to a content description in the form of knowledge and skills required for the achievement of that particular outcome, as set out in the table below:

Table 5.1: Summary of curriculum outline

General outcome	Specific outcome	Knowledge about	Skills
The student must contribute to the establishing of subtitling as a means of audio-visual language transfer in South Africa in terms of internationally accepted standards and consistency.	The student must be able to produce a faithful translation of the original.	The source and target languages that s/he intends to work in. An in-depth knowledge is required of these languages, with particular emphasis on extensive vocabulary.	Demonstrate a very high level of proficiency in both the target and source languages, with L ₁ -proficiency in the target language at the least.

		The translation problematic related to translation between her/his target and source language(s).	Resolve the translation problematic between source and target language by producing high-quality translations.
		The conventions of subtitling to ensure optimum readability.	Produce a range of valid translations with varying lengths based on the use of synonyms, pronouns and other forms of linguistic substitution.
The student must be able to create qualified subtitles within a poly-semiotic context.		The semiotics of film and television.	Create subtitles that take into account the semiotic context of film and television.
		The semiotic model for the creation of qualified subtitles.	Create subtitles that have a meaning-potential equivalent to that of the original source text.
		The semiotic context and requirements of potential viewer groups.	Adapt their subtitles according to the semiotic requirements of intended viewer groups.
The student must be able to shape titles for optimum readability.		The guidelines for segmentation and text distribution in subtitling.	Shape subtitles that are easily readable through segmentation of text units and line breaks. Ensure coherence between titles where sentences are spread over more than one title.
		The effect of abbreviations and non-standard linguistic forms on the readability of subtitles.	Use abbreviations and non-standard linguistic forms in ways that do not detract from readability.
		The use of punctuation to promote readability in subtitles, as well as punctuation conventions unique to subtitling.	Use punctuation to enhance readability in accordance with the established conventions of subtitling.
The student must be able to cue rhythmically in accordance with the audio and visual components of the film or television programme.		The correlation between subtitles and audio and visual elements of the film or television programme.	Create subtitles that respect the audio and visual rhythm of the film or television programme.
		The appropriate places for the insertion and removal of subtitles.	Insert and remove subtitles accurately and in harmony with the audio and visual rhythm of the film or television programme.
		Ways of reflecting variations in audio rhythm in subtitles.	Reflect variations in audio rhythm in subtitles.
The student must be able to condense text.		Temporal and spatial constraints of subtitling.	Shape titles according to the temporal and spatial constraints of subtitling.
		Substitution and deletion strategies used in condensing.	Reduce the source text in volume by using substitution and deletion strategies.

		The importance of maintaining the meaning-potential ratio while condensing.	Create subtitles that adhere to the temporal and spatial constraints of subtitling without eroding their meaning-potential.
	The student must be able to evaluate subtitles critically.	Subtitling theory and internationally accepted subtitling standards, especially the <i>Code of best subtitling practice</i> .	Critique a given set of subtitles according to internationally accepted subtitling standards, especially the <i>Code of best subtitling practice</i> .
		Their own thought and learning processes.	Suggest improvements to any set of subtitles, including their own, where these standards are not met.
			Proofread and edit subtitles for broadcasting.
The student must be able to address the subtitling needs of specific user groups in the South African context.	The student must be able to subtitle for varying reading speeds according to the needs of particular user groups.	The national context of subtitling, specifically the aim of subtitling in South Africa.	Create subtitles that assist in the achievement of social aims for the implementation of this form of audio-visual language transfer.
		How subtitling can be used to achieve these aims.	Describe the user needs of various groups in the viewer population, and where this information is unavailable, conduct research to establish user need profiles.
		The demographics of the viewer population, specifically the needs of various viewer groups in terms of reading rate.	Advise broadcasters and production houses on the suitability of material for subtitling to achieve specific aims.
	The student must be able to present verbal and non-verbal aspects of the audio in accordance with the needs of particular user groups.	The subtitling needs of viewers with impaired hearing.	Create subtitles that reflect non-verbal audio elements of the audio.
		Conventions used to convey sound effects and other non-verbal elements of the audio.	Contribute to creation of a set of visual codes that represent non-verbal audio elements, while minimising intrusion. Describe the user needs of viewers with impaired hearing, and where this information is unavailable, conduct research to establish a user need profile for this group.
	The student must be able to contribute to the promotion of multilingualism in South Africa through the creation of subtitles	The ways in which subtitling can be used to promote non-L ₁ language acquisition.	Create subtitles that promote non-L ₁ language acquisition
The South African language scene and related policies.		Create subtitles that will assist with the standardisation of the target language orthography	
The orthography of their target language, and the ways in which subtitling could be used to promote standardization.			

Having established that formal training of language practitioners (as opposed to teaching oneself) holds certain definite benefits, the study concludes that the most suitable training institution for subtitlers in South Africa is a university with a dedicated subtitling centre. The strong academic focus required for the South African course, as well as the need for further research, are factors that have contributed to the selection of a university as training institution. In the absence of an existing subtitling centre in South Africa, it is suggested that the university responsible for subtitler training establish a dedicated subtitling centre where students could be instructed in the practical side of subtitling. By combining academic-theoretical and practical learning environments, the course aims at integrating theory and practice by delivering subtitlers that are not only well-versed in subtitling theory and therefore able to contribute to research on subtitling in South Africa, but also subtitlers who have the ability to produce subtitles of an internationally accepted standard that address the needs of domestic viewer groups.

The research that is still required in this area is not insignificant, and will be discussed in greater detail under section 5.2. At this point, it suffices to say that the research can largely be divided into two main areas, namely research of a more general nature aimed at contributing to subtitling as discipline on an international level, as opposed to research of a more specific nature aimed at optimising subtitling for the South African context. Both areas of research are important. The first is significant because South Africa draws on existing subtitling theory for the training of subtitlers, thereby avoiding duplication of research and assisting the fast-tracking of the implementation of subtitling by avoiding mistakes made in other countries. However, where gaps in existing subtitling theory are identified, it is in the interest of South African subtitling researchers to contribute to these areas, because possible solutions to universal subtitling dilemmas will eventually also benefit South African subtitlers. The second area of research is important, because the unique national context of subtitling demands home-grown solutions to uniquely South African subtitling challenges.

The last part of the study constitutes an example of research that is aimed at addressing a perceived shortcoming in existing subtitling theory. The issue is relevant to subtitling practitioners over the world, and as such also to South Africa. The research model proposed in this study is aimed at addressing both the need for achieving equivalence and the need for condensing in subtitling theory, instead of viewing them as mutually exclusive.

There exists a great emphasis on condensing in subtitling theory, simply because it is central to the nature of subtitling. This has led to an emphasis on condensing in subtitling theory, without consciously including equivalence in these discussions. As a result, condensing may be seen to have a greater importance in subtitling than equivalence, or alternatively, that a certain measure of whittling away of content is acceptable.

In order to address this dilemma, the study proposes a semiotic model for balancing equivalence and condensing in the creation of subtitles. The model is based on the semiotic model for the achievement of equivalence in translation by Dinda Gorlée. Her work is a reaction against what she sees as reductionist theories of translation that rely on rendering only the “relevant” characteristics of the source text in the target text. Because of the inherent need for condensing in subtitling, the danger of a reductionist approach is even greater in interlingual subtitling than in other forms of translation.

The subtitling model proposed in this study has been formulated within the context of the temporary and spatial constraints of subtitling. However, it is an attempt to shift the focus away from an approach of condensing to retain what is deemed relevant by the subtitler, to an approach where the ideal is semiotic equivalence between the source text and the subtitled target text in spite of condensing.

The proposed model for the attainment of equivalence in subtitling falls within the framework of Interpretative Semiotics. The test for equivalence is whether the sign in the target text deploys the full meaning-potential (or as close to it as possible) of the original source text. In addition to proposing this model, it is also hoped that this part of the study will contribute to an increased awareness of the equivalence-condensing discussion among subtitling researchers.

The next section will deal with areas of research not covered in this study but which are important for the successful implementation of subtitling in South Africa.

5.2 Avenues for further research

5.2.1 User group profiles

Although this study emphasises the need for user group profiles, it does not pretend to identify the needs of specific user groups in any detail. Profiles will be determined by the viewer group at which a specific programme is aimed, and this is largely decided by the broadcaster. Although broadcasters attempt to reach as wide a viewer group as possible with any given programme, it is important for them to define

who the target viewer group is. In a sense, this work is already done by the marketing department when determining what advertisements to screen during which time slots. Although they do not focus exclusively on the language-related capabilities of the audience, they do attempt to define the target viewer group in order to optimise marketing. This could be used as a basis for research to compile language-based viewer group profiles that would be conducive to needs-specific subtitling for particular programmes.

5.2.2 Non-verbal visual cues for sound-effects

The use of non-verbal visual cues for sound-effects could contribute to conveying this information in a compact format, minimising intrusion for viewers who do not require this type of information. Further research into the creation of a standardised set of cues is required before this strategy could be implemented.

5.2.3 Reading behaviour

Although part of user group profiles, reading behaviour (including reading speed) deserves special mention for a variety of reasons. In the first place, reading behaviour guidelines cited in this research apply to Germanic languages in predominantly literate countries. However, extensive research into reading speeds for non-Germanic South African languages are required to determine reading behaviour guidelines for subtitling in these languages in a developing country.

5.2.4 Core vocabularies

The identification of core vocabularies for the various national languages could facilitate the task of subtitlers by identifying high-frequency words for use in subtitles. Continued exposure to this vocabulary will enable readers to follow subtitles with greater ease by simplifying reading.

5.2.5 Multilingualism and the national broadcaster

Further research is required into the language agenda of the national broadcaster, and ways in which this could be adapted to address the language rights and needs of South Africans, with particular focus on the contribution subtitling could make to the language status, particularly of the more marginalised languages.

5.2.6 Changes in literacy levels as a result of subtitling

A long-term quantitative study on changes in literacy levels as a result of subtitling should be done in the interest of providing data for the South African situation. The

results of such a study will be important in optimising the use of subtitles to address illiteracy in South Africa.

ADDENDUM A



POTCHEFSTROOM UNIVERSITY FOR CHRISTIAN
HIGHER EDUCATION

EXECUTIVE SUMMARY
of
PROJECT REPORT

TRAINING SUBTITLERS IN SOUTH AFRICA:
THE NEEDS OF A DEVELOPING COUNTRY
for
THE PAN SOUTH AFRICAN LANGUAGE BOARD

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1. Introduction

1.1 Background

Although the amount of subtitling broadcast on SABC TV has increased substantially over the past few years, it is still inadequate in terms of volume and quality. With the exception of the subtitling on SABC2's *7de Laan* (the only programme that is fully subtitled), the subtitling on SABC-TV is of an inferior standard and inconsistent with regard to cueing, positioning of subtitles, number of characters per line, duration of subtitles, and font size.

The current state of subtitling on SABC-TV can probably be ascribed to a number of reasons such as a lack of subtitling policy, the absence of any regulating committee or office where subtitling (or language) is concerned, and a lack of professionally trained subtitlers. In order to familiarise the viewing public with subtitling as a means of language transfer, it is essential to have a subtitling policy that is aimed at uniformity and standardisation of the mode. Another aspect that needs to be addressed by policy is the establishment of a greater degree of language equity on SABC-TV in the interest of multilingualism. However, before any of these aims can be addressed, it is imperative to provide a strong body of subtitlers in all the official languages who have been trained for South African conditions, including the challenges of a multilingual and multicultural society, and those of the Deaf and hard-of-hearing community in the country.

The challenges that will have to be met relate primarily to the introduction of subtitling in South Africa as a developing country with a multilingual language policy awarding official status to 11 languages. In this regard the major concern seems to be the lack of adequately trained subtitlers in all the official languages as well as the lack of trainers of subtitlers. Before this need is addressed, the technology cannot be utilised optimally and regulations and guidelines concerning subtitling will have no effect. Furthermore, a body of adequately trained subtitlers will facilitate the large-scale introduction of the medium and make it possible to explore its full potential in South Africa.

In view of the lack of experienced subtitlers in the country, it was decided to focus this project on the development of training programmes for subtitling.

Indications are that South Africa could set the tone and become a pioneer in the field of subtitling in developing countries if the introduction of this mode is done responsibly and in a way that both draws on the experience of other countries and simultaneously actively seeks solutions for the specific challenges facing developing countries.

This research project therefore addressed the following questions:

- What are the unique challenges facing South Africa as developing country in terms of the large-scale introduction of subtitling? This question includes matters such as language policy and politics, language dynamics, pragmatics, language status, and literacy.
- What are the training requirements for South Africa in terms of subtitling and how can subtitlers be trained most effectively in both the short and long term?
- What are the training requirements for subtitling for the Deaf and hard of hearing in South Africa?
- What role can the training of subtitlers play in the development and status of all official languages in South Africa?
- What are the long-term training goals needed to establish subtitling as a permanent force in all spheres of South African life?
- What can be learned from both developed and developing countries where subtitling is used intensively?

1.2 Aims

The aims that flow from these questions are:

- To investigate the challenges facing South Africa as developing country in terms of the large-scale introduction of subtitling, also with regard to issues such as

language policy and politics, language dynamics, pragmatics, language status and cultural diversity.

- To determine the short- and long-term subtitling training requirements for South Africa as developing country (with reference to the history of this discipline in both developing and developed countries).
- To present an outline curriculum for the training of subtitlers in South Africa.

2. South African subtitling conditions

2.1 Introduction

In this phase of the research, the following aspects were dealt with by means of literature surveys and investigations:

- Availability of actual and potential subtitlers in all 11 official languages.
- Constraints unique to specific languages that will impact on subtitling against the background of language planning challenges.
- Literacy and reading speed.
- Training facilities.
- Subtitling training and language status and development.

2.2 Subtitler availability

First of all, it was established that there is a real need for subtitlers in all eleven official languages since there are currently no fully-trained subtitlers with a background in both the linguistic and the technical aspects of subtitling. It is only through the training of a body of subtitlers to meet current and future demands for subtitling that standardisation can be achieved and the uneven quality and inconsistency in style of subtitling on SABC-TV will be addressed.. A crucial step in the training of subtitlers is the establishment of a subtitling centre that will provide the required in-service training to supplement short courses and postgraduate training

such as that currently offered by the Vaal Triangle campus of Potchefstroom University.

- **Language-specific constraints for subtitler training**

A number of constraints unique to specific languages in South Africa that will impact on the training of subtitlers have been identified. Other problems such as the lack of demand in the industry at present and the lack of standardisation are more universal but will nevertheless have to be resolved.

The most significant language-specific constraint seems to be the average volume of individual languages in relation to other languages at lexical and syntactical levels. Here the conjunctive nature of the Nguni languages makes them much more difficult to distribute across lines in a subtitle (segmentation) whereas the disjunctive nature of the Sotho languages as well as Xitsonga and Tshivenda creates a problem in terms of volume in a mode where volume is required to be kept at a minimum.

- **Literacy and reading speed**

Literacy and reading speed were identified as extremely important considerations in terms of the parameters of subtitling training in South Africa. The alarming fact that approximately one in every two adults in South Africa is functionally illiterate, makes this a cause for great concern. Nevertheless, it was indicated in the study that subtitling potentially provides a method of intervention to improve literacy at very low cost as has been shown extensively in India (Kothari, 1998). Also, subtitling has been tested extensively in the teaching of reading and research indicates that it could be used with great success for the teaching of reading to both hearing and hearing-impaired adults and children (Nir, 1984; Koskinen *et al*, 1986; Bean, 1989; Milone, 1993; Linebager 2001).

Most importantly, this chapter has shown that subtitles should be adapted to meet the needs of the large number of functionally illiterate people in the country. In other words, the training of subtitlers for the South African conditions should focus significantly on aspects such as aligning the voice and subtitles as far as possible to avoid confusing the less literate viewer. Where possible, the grammatical structure should be simplified while maintaining the word order. The rule of thumb in this regard

seems to be that, while keeping the language of subtitles as simple as possible to accommodate less literate viewers, there should still be a high level of correspondence between the words that can be heard and the words of the subtitle. Subtitlers should also be trained to create logical segmentation of thoughts in subtitles. Of course these are only guidelines and the subtitler must be trained to make every decision based on the context and to take care not to omit or simplify essential information.

▪ **Training facilities.**

This chapter determined that although the training of subtitlers is potentially very expensive, a number of cheaper alternatives are available. The training facilities currently available at the Vaal Triangle Campus of North West University (formerly Potchefstroom University for CHE) are sufficient or introductory training courses that will provide a solid foundation for the training of professional subtitlers, but this training should be supplemented by internships.

In the long term the only responsible way to approach the training of subtitlers will be the establishing of a subtitling centre from which to co-ordinate training and subtitle production. This would also make it possible to provide internships and therefore hands-on training to ensure sustainable training.

The conclusion reached in terms of this centre is that it should be an independent subtitling centre (non-profit) functioning under the auspices of PANSALB and in collaboration with the SABC (and MNet as well as e.tv), DAC, DEAFSA, SATI and training institutions such as Potchefstroom University (Vaal Triangle Campus). Ideally, the centre should provide internships to supplement the fundamental training provided at the tertiary institution as part of its core function of creating subtitles to serve the different language communities in the country. The support of the various language communities as well as Government grants for the initial setting up of the centre is essential conditions for this centre. The ultimate aim should be to operate this centre on a self-funding, not-for-profit basis to provide the best possible service to all the language groups in the country.

- **Subtitling training and language status and development.**

The conclusion reached in terms of the position of subtitler training in language status and development is that subtitling will only be a tool in developing languages if the standard of subtitling is consistently high and if the subtitling is done in accordance with the principles for the development of language. Therefore, subtitlers must acquire the skills to enhance the status of their individual languages in a creative and dynamic manner.

In this regard it is important to determine specific standards and rules according to the needs of the different language communities in consultation with all the role players to allow for adequate training. This should be supported by a needs analysis to ensure that subtitlers will be able to provide a service that addresses real needs. It is further important to note that the training should address linguistic as well as technical aspects and that subtitlers who work in one or more languages belonging to the Nguni or Sotho families of languages, should have a solid knowledge of the other languages in their language family. This would facilitate attempts at harmonisation between languages in the same family or at least standardisation within individual languages.

The needs analysis referred to above should also take matters such as the right to access information into account, which would lend a higher priority to educational programmes than to entertainment, for example. Therefore, subtitlers will have to be trained on the different requirements of different genres.

All the requirements in terms of language status and development will call for the establishing of a centre from which liaison with the relevant bodies involved in language planning can be co-ordinated.

This chapter therefore established that the challenges facing South Africa as developing country in terms of the large-scale introduction of subtitling can only be met through the introduction of a responsible training programme that includes a solid background on and training in matters such as the technical aspects of subtitling, language politics, language status and development, language-specific constraints, literacy and reading speed, and viewer needs. This component of the training can be provided at a training institution. The existing facilities at the Vaal Triangle Campus of Potchefstroom University should be sufficient. This should be supported by a

practical component where prospective subtitlers undergo an internship. The latter can only be achieved in a supervised and structured manner if a subtitling centre is established where subtitlers can mature in a real-life environment. Such a centre should be established as a matter of urgency if large-scale subtitling is to be introduced responsibly in South Africa.

In the next section the training requirements for subtitling in South Africa will be investigated with a view to identifying the specific areas of focus in a training curriculum. This will build on the background provided in section 2.

3. User-based parameters for the training of subtitlers in South Africa³⁶

3.1 Introduction

In order to determine the short- and long-term subtitling training requirements for South Africa as developing country (with reference to the history of this discipline in both developing and developed countries), this section focused primarily on the subtitling needs of South Africa with a view to establishing how to train subtitlers to meet these needs. This part of the investigation consisted mainly of a literature survey.

3.2 Background

One of the key factors in the implementation of subtitling in South Africa on a much larger scale than is currently the case is the response of viewers. Broadcasting in South Africa is first and foremost about Audience Ratings or AR³⁷, which translates into advertising revenue. This also applies to the SABC that is no longer a public broadcaster but to a large extent a commercial broadcaster. In other words, the broadcasters in South Africa as primary users of subtitles will be reluctant to

³⁶ This section is adapted from a forthcoming article by HC Kruger co-authored by JL Kruger (User-based parameters for the training of subtitlers in South Africa).

³⁷ AR's (Television Audience Ratings): refers to the number of viewers, averaged across a time period (e.g. a commercial spot, a ¼ hour, or a programme) and percentaged on the total number of individuals in the relevant Target Audience (Harcombe, 2000). AR is also a "time weighted average": the average of the length of time that each person watched TV within the target audience, over a specified time period (Harcombe, 2000).

introduce large-scale subtitling if there is even a perception that it will affect their AR negatively.

In this regard, Ivarsson and Carroll (1998:1) state that subtitling must be well executed if it is to be accepted by viewers. They continue to say that

many people, including both broadcasters and self-taught subtitlers, do not seem to have much of an idea of what it takes to produce good subtitles. In particular, the training of subtitlers lags far behind demand for this particular language transfer service (Ivarsson and Carroll, 1998:2).

As Ivarsson and Carroll point out, an uneven quality of subtitling is directly linked to insufficient or non-existent training of subtitlers. This is of particular concern in the South African situation where subtitler training is still in its infancy. The fact that subtitling has not yet been implemented on a large scale in South Africa, allows us to learn from the experience of other countries and to avoid making the same mistakes. In the US, for instance,

[i]n those early days of captioning, the people involved were too busy trying to provide a service to do much research on captioning techniques. In general, whenever captioners faced a caption editing problem, they would just talk about it among themselves, reach an agreement, and their decision would become captioning policy. For their part, deaf and hard of hearing people were so delighted to have captioned television that they would literally accept anything thrown on the screen. For years after captioned television became available, deaf and hard of hearing people were very reluctant to criticize the service (Jensema & Burch, 1999:6).³⁸

The two problems identified in the above statement, namely the lack of subtitling policy and standardisation on the one hand, and the response of user groups on the other, are also problems in South Africa. Little consistency exists in the subtitling that is currently broadcast, in spite of the fact that subtitling has been around for more than a decade in the country, and the deaf community is all too thankful for the little subtitling they do get.

3.3 *Subtitling as key to access*

³⁸ “Captioning” is the American and Australian term for the European intralingual subtitling. This article will use intralingual subtitling as it offers greater terminological clarity, except when quoting from sources that use the terms “caption”, “captioned”, “captioning” or “captioner”. Although this quote focuses on intralingual subtitling, it is equally applicable to interlingual subtitling.

One of the most important reasons for the introduction of subtitling on a large scale, is the fact that it provides different groups of users access to information and entertainment to which they would not otherwise have had access. In other words, one of the main benefits of subtitling is that it allows access to information that is transmitted via the audio channel, to viewers who would otherwise have been excluded. This information typically includes spoken language (e.g. dialogue, monologue, commentary and intonations), music and other sound effects (e.g. gunshots, thunder, car crashes, etc.). It is also known as the soundtrack.

This audio information may be inaccessible to viewers in varying degrees and for a variety of reasons. Physical disabilities such as hearing loss or deafness may limit, or altogether prevent, access to all audio information broadcast on the audio channel. To understand the broadcast, viewers with these disabilities rely on sight (including lip-reading – which is of limited use in any programme where the mouth of the speaker is not visible throughout) or people who can interpret the audio content for them.

Another factor that may restrict access to the audio channel in television broadcasts is the use of a language other than the first language (L_1) of the viewer. In this case, the viewer does have access to the entire soundtrack, but not to the language used in the dialogue. Here the sound effects, intonation, etc. do not present a problem, but the viewer also has to rely on the visual signals and his or her interpretation of the audio signals, and will not be able to follow the programme meaningfully without some assistance from someone who does understand the language. In South Africa with its eleven official languages, none of which is spoken by all South Africans, this situation would occur during any broadcast. No matter what language the broadcast is in, it will always be inaccessible to all those viewers who do not speak that particular official language.

Such limited access could, however, be improved and in some cases eradicated through the use of subtitles. Research has shown that subtitles are an effective way of making audio information accessible to those with hearing disabilities (Shulman, 1978; DTN, 1999 etc.), while at the same time improving comprehension (Lewis, Jelinek & Jackson, 2001; Bird & Williams, 2002, etc.). Nugent (1983) came to the conclusion that subtitles are successful in raising the levels of comprehension in both

hearing and hearing-impaired students. Furthermore, interlingual subtitles are used to make non-L₁ audio information available to viewers.

Although subtitling therefore has the potential to provide millions of people in South Africa with access to information and entertainment, it does require a certain level of literacy in order to be effective. If taken at face value, this may appear to be quite a big obstacle in terms of the use of subtitling in South Africa. After all, the adult illiteracy rate in the country is 18 million out of a total of 45 million (Williams, 2002). Approximately one in every two adults is functionally illiterate, i.e. lacks “the literacy necessary for coping with most jobs and daily situations” (Concise Oxford Dictionary, 1998). Illiteracy not only affects individuals, but also the nation as a whole, and illiterate nations are less healthy, productive and wealthy than nations with a higher literacy rate (PBS, 2002). Without intervention to improve literacy skills, the illiterate are likely to remain economically disempowered and locked in a cycle of poverty.

The irony in this situation is that subtitling does offer a real chance to make a difference to this very serious situation – it can play a major role in literacy training, something that has been lacking in the country for some time.³⁹

Subtitling is a form of intervention that has been tested extensively in the teaching of reading in the United States, and research indicates that it could be used with great success for the teaching of reading to both hearing and hearing-impaired adults and children (Peters, 1979; Koskinen *et al*, 1985; Koskinen *et al*, 1986; Bean, 1989; Milone, 1993; Linebager 2001). Research in India, a developing country like South Africa, indicates that subtitled television is a successful means of raising levels of literacy among adults in remote areas (Kothari, 1998).

Apart from providing access to information and entertainment where there was no access before, and apart from providing an economically viable tool in literacy training that can in turn provide thousands of people with access to information, subtitling can also be an important instrument in the realisation of language rights. Closely linked to the issue of language rights, is multilingualism

³⁹ Although this study will only refer to the benefits of subtitling for the illiterate, many of these advantages are also applicable to those who are neo-literate or semi-literate, in the first instance to cement newly acquired literacy skills, and in the second to expand literacy skills.

as the dynamic process, which empowers the speakers of different languages to convey messages in a language or languages of their own choice, as well as displaying sensitivity for the need of different communities to express themselves in their own vernacular (Anon, 2002: 2,3).

The ability to speak more than one language, makes it possible to communicate with a wider range of people and to have access to a wider range of activities. In the words of the old Afrikaans saying: “Soveel tale as ek kan, soveel male is ek ‘n man” (the more languages I speak, the more times I am a man).

According to the Pan South African Language Board (PANSALB), monolingualism and the denial of language rights have been used in the African context to disempower, especially during the time of colonisation, and also to exclude people from economic, political and social participation (PANSALB, 1998). In South Africa with its eleven official languages, multilingualism is seen as a way to accommodate the language rights of the speakers of all official languages. PANSALB strives for the promotion of multilingualism

in order to enable South Africans to free themselves from all forms of linguistic discrimination, domination and division; and to enable them to exercise appropriate linguistic choices for their own wellbeing, as well as for national development (PANSALB, 1998).

Apart from the above core applications of subtitling (first to provide access to information, second to improve literacy, and third to realise language rights and promote multilingualism), all of which have the potential to empower large groups of people, subtitling can also be used in a more secondary role as an aid in language acquisition and proficiency training, the transfer of content through increased comprehension. Over a period of 20 years, research in the United States has shown that subtitling is an effective means to facilitate second language acquisition in both hearing and hearing-impaired subjects (Holobow *e.a.*, 1984; Hanson & Padden, 1989; Smith, 1990; Spanos, 1990; Neuman & Koskinen, 1992; Neuman & Koskinen, 1993; Borrás & Lafayette, 1994). Some of the benefits of subtitling for second language acquisition are that it improves comprehension and oral performance, facilitates incidental learning of new words, and is a great motivator. Although these applications are also very important and should be explored more carefully in future research, this study will focus mainly on the applications related to access to information, literacy, and language rights and multilingualism.

1.2.2 On the basis of the above, the potential user groups in South Africa can be divided into users with hearing impairment (consisting of pre-lingually deaf users, post-lingually deaf users and hard-of-hearing viewers) and users without hearing impairment (including illiterate users and non-L₁ users).

Before it will be possible to address matters of standardisation and policy and viewer responses, it is extremely important to determine the different needs that exist among different user groups in the country, since subtitling is not a generic mode that will automatically address the needs of the entire population.

3.4 User-based parameters

The needs description indicates pronounced differences between the groups in terms of reading speed, vocabulary, access to non-linguistic audio elements, and knowledge of source language. Subtitling will only be able to address these needs under the following conditions.

Prospective subtitlers should be familiar with the demography of the viewer base and the needs of the respective subtitle user groups. These needs will determine the type of programme material selected for subtitling, as well as the style of subtitling. It is important for production houses and broadcasters to realise that subtitling is not an add-on that will automatically increase viewer numbers. If done incorrectly, subtitling can detract from the quality of the viewing experience, instead of adding to it. Subtitling can serve any of a number of purposes, and these purposes will be determined by the needs of the potential viewer groups.

Subtitler training should provide a solid background on, among other things, the following:

- Subtitling will only be able to address these needs if subtitlers are trained to subtitle with the needs of (a) specific subtitle users group(s) in mind, based on user group profiles. Subtitlers should also be able to advise decision-makers on the suitability of programme material for subtitling, and the style of subtitling. User group profiles should be kept current based on systematic and representative user feedback.

- Subtitler training should provide the opportunity for the subtitling of material at different reading speeds, as well as the knowledge to decide on the appropriate reading speed for the average viewer in a particular user group and the suitability of material for subtitling at a specific rate.
- All non-linguistic audio elements should be subtitled in subtitling for the hearing-impaired, and the use of standardised non-verbal cues should be encouraged to minimise intrusion, especially where the target viewer group includes beginner-readers.
- Subtitler training should equip prospective subtitlers to make choices that will simplify reading, without unduly raising the level of inference, and encourage reflection on the nature and consequence of language structures chosen. This should be balanced with the need for phonemic correlation in subtitling for beginner readers.
- Furthermore, it should instil in prospective subtitlers the ability to estimate the type and degree of correlation required between audio and subtitles, and to present these concurrently with the audio.
- Translation as part of subtitler training should build on a high level of existing proficiency in both the target and source languages, as well as sharpen translation skills in the context of subtitling. It should also foster an awareness of the special demands subtitling places on translation between various official languages in South Africa.
- Subtitler training should create an awareness of the range of vocabularies of the potential viewer groups, and equip subtitlers to select vocabulary that is appropriate for the target subtitle user group(s).

These parameters are by no means the only requirements for subtitler training in South Africa and should form part of a course that is based on universal subtitling skills such as the attainment of semiotic equivalence, condensing and synchrony. However, the above parameters are based on the needs of potential subtitle user groups in South Africa, and can be used as a guideline for the localisation of subtitler training programmes that are used in other countries.

4. Training programmes for subtitling in SA

4.1 *Introduction*

The aim with this section is to present an outline curriculum for the training of subtitlers in South Africa. In this section an attempt is made to integrate the training parameters identified and discussed in the previous chapter, in a somewhat theoretical manner, with the more practical reports on a series of subtitling workshops conducted at the Vaal Triangle Campus of the Potchefstroom University between 2001 and 2003. This was done in order to arrive at a concept curriculum for the short and long-term training of subtitlers in South Africa.

The section commenced with a discussion of **parameters** for the training of subtitlers providing some preliminary thoughts on the **selection of candidates** for subtitling training, the **duration of training courses** to achieve certain objectives, measures for the training of trainers to establish a strong body of subtitlers in South Africa, and **equipment** required for training.

The section then presented a concept **curriculum for subtitler** training in the form of an **honours course** in subtitling. This was followed by a **concept curriculum for short courses** in subtitling. Both these curricula are based on the user-based parameters identified in section 3.

4.2 *Training parameters in South Africa*

The fact that subtitling is not yet considered to be a viable career choice in South Africa because of a lack of adequate demand for this mode, does anything but alleviate the need for setting up a solid and responsible training programme. Judging from the diverging styles and quality of subtitles currently employed on the national broadcaster (SABC), this demand is already there even if it is not yet considered a priority.

At the moment a chicken-egg situation exists: subtitling cannot be introduced on a large scale to meet the divergent needs of different user groups because there are not sufficient numbers of adequately trained subtitlers in the country, and the mode will only be established once there are sufficient numbers of well-trained subtitlers.

The following paragraphs will venture some thoughts on the infrastructure in terms of people and material that will be needed in order to establish subtitling as a meaningful mode of communication in South Africa.

4.2.1 Selection of candidates

Since subtitling is a specialist area that requires individuals who will be able to operate across a number of semiotic spheres, it stands to reason that there should be some form of screening involved for prospective trainees. Although a wide range of experience and skills are required for subtitling, it would seem that experience in interpreting and translation is beneficial. A background in interpreting would be beneficial because of the consecutive nature of interpreting that can be related closely to subtitling. The amount of experience across a number of fields from translation to media and film would suggest that subtitling should be offered at postgraduate rather than undergraduate level, and preferably to more mature students.

Some criteria could be applied to ensure that candidates who undergo this fairly expensive and intensive training have the potential to become subtitlers. These criteria should, however, be regarded as positive instruments to optimise the potential of subtitling, rather than a tool to keep people out. Criteria that could be used include the following:

- A genuine interest in and passion for the mode
- Prior experience in translation and/or interpreting
- Computer literacy
- Language proficiency in source language and target language
- The ability to collect and access information
- The ability to reduce text
- Good auditory comprehension and visual literacy

Before launching a training programme it would therefore be important to devise a battery of tests to screen candidates. Ideally the tests should be devised in such a manner that, apart from finding the most suitable candidates, the candidates themselves will also get an idea of the requirements of the mode and be able to form a realistic opinion on whether or not they would like to be trained in this mode.

Another aspect to bear in mind when compiling such a battery of tests would be the skills these subtitlers will have to master in the course of their training. The skills that a subtitler should ideally have can be divided into technical skills and linguistic skills. Technical skills include the following:

- A keen sense of the relationship between sound and image.
- The ability to manage space and time optimally.
- The ability to spot or cue in such a manner that the rhythms of the visual and auditory channels are respected.
- The ability to project subtitles professionally while respecting shot changes.

Linguistic skills the subtitler should have include the following:

- The ability to reduce and adapt linguistic units without compromising on meaning.
- Reformulation and use of synonyms to achieve semiotic equivalence within the space/time constraints of individual or sets of subtitles.
- Text distribution within subtitles and between a series of subtitles.
- Revision and proofreading to eliminate spelling errors, grammatical errors, punctuation errors, etc.
- Aural comprehension of sometimes oblique utterances.

Between the above criteria and skills, a selection procedure should be established and refined in order to optimise resources. This should also ideally be done within a subtitling centre where screening/selection, training and internship can be run in a controlled environment. The subtitling centre will be discussed in more detail in Chapter 3.

4.2.2 Duration of courses and course types

Since subtitling is a highly specialised field of language practice, the intensity of training will reflect this. In order to train professionals in a postgraduate course, a full year of full-time training should provide a solid background. Six months should be devoted to intensive contact sessions - a total of approximately 130 hours (13 weeks, 2 hours per day). This total should be made up of approximately 52 hours of theory

and formal instruction (4 hours per week), and 78 hours (6 hours per week) of guided individual practical sessions in the subtitling laboratory. The remaining six months should be devoted to approximately 130 hours of practical, supervised traineeships including at least 30 hours in a real-life internship (possibly in the subtitling centre) and a comprehensive project. This programme would of necessity form part of a more comprehensive course in language practice including modules on the theory of language practice, translation and language editing, applied linguistics in the target language, and other related modules.

A distinction should also be made between such specialised courses and introductory courses where candidates can be introduced to the mode through short courses. Introductory courses would include the same basics as specialised courses, but with substantially less contact time and without an internship. These courses can vary in length from 60 to 100 hours that can be distributed over successive weekends, but should ideally be close together and include individual work at home.

4.2.3 Training objectives and the training of trainers

Objectives for training include the following:

- to initiate candidates into this field in language practice;
- to teach candidates specific techniques;
- to train translators specialised in subtitling;
- to educate candidates in terms of the capacity to analyse, auto-evaluation, communication, creativity and lateral thinking, as well as teamwork.

What has to be kept in mind is that the training of subtitlers for the South African situation cannot be a matter of theoretical teaching. Candidates must be immersed in the practice of subtitling in order to become skilled in all aspects of the field. Therefore, internships are essential. One way of dealing with internships could be the introduction of a subtitling centre where production of subtitling can be the core business and where subtitlers can receive hands-on, on-the-job training. This would further strengthen the aim of producing specific standards in subtitling in this country. Other possibilities include internships with production houses, with the SABC or other broadcasters, or in education where distance-education videos can be subtitled.

Particularly in the case of the training of trainers, it is essential to include an evaluative section. This could either be in the form of self-assessment or peer-assessment, or assessment by an impartial control group. In the case of a subtitling centre, a combination of supervisor-assessment, peer-assessment, and real-life feedback forums can be used. In other words, the emphasis should be on individual as well as collective assessment by the trainer and the trainees. The aspect of practical success of subtitles in an actual situation should also be explored.

4.2.4 Equipment and costs

The equipment involved in the creation of subtitles is perhaps the single most prohibitive factor in terms of the training of subtitlers. At the 2000 Languages and the Media conference in Berlin the opinion was expressed in a workshop on subtitler training that training can only really be done effectively with between 5 and 10 workstations.

Although various options were compared in the full project report, this summary will only include the tables detailing the cost components of an elementary digital training laboratory with 5 users and those of a fully operational, self-funding subtitling centre with 10 users.

Table 4.1 Digital training laboratory (elementary)

Item	Description	Qty	@	Total
Desktop PC	Pentium IV 256Mb RAM 120 Gig HD 72inch screen Windows XP Professional	5	10000	50000
Supersubs	Own developed software	5	R200	1000
ATI All-in-Wonder Radeon 9000 (AGP slot)	Graphics board	5	R3000	15000
Headsets	Audio block-out	5	R1000	5000
TOTAL INITIAL COST				R71000
ANNUAL MAINTENANCE COST				R15000
Advantages:				
<ul style="list-style-type: none"> ▪ Low initial cost and low maintenance. ▪ Provides all the basic features required for training. 				
Disadvantages:				
<ul style="list-style-type: none"> ▪ Does not deliver recordable output. ▪ Does not include all the functions of a professional system 				
Conclusion:				
<ul style="list-style-type: none"> ▪ In a dedicated training environment this is a feasible option if followed up by practical internships in a studio environment. 				

Table 4.2 Production studio/subtitling centre

Item	Description	Qty	@	Total
Desktop PC	Pentium IV 256Mb RAM 120 Gig HD 72inch screen Windows XP Professional	10	10000	100000
D.light	Annual Software licenses	10	R8000	80000
ATI All-in-Wonder Radeon 9000 (AGP slot)	Graphics board	10	R3000	30000
Headsets	Audio block-out	10	R1000	10000
Remote control for cueing		10	R1500	15000
Betacam with VITC and LTC		1	R250000	250000
Network		1	R50000	50000
TOTAL INITIAL COST				535000
Annual maintenance cost				300000
Annual personnel costs (30 staff @ R200 000)				6000000
Annual overheads (12 months @ R50 000)				600000
TOTAL ANNUAL COST				6900000
POTENTIAL ANNUAL INCOME (See output below)				8400000
POTENTIAL ANNUAL PROFIT TO BE RE-INVESTED IN STUDIO				1500000

<p>Advantages:</p> <ul style="list-style-type: none"> ▪ Professional studio for the preparation of broadcast-quality products. ▪ 10 subtitlers can work simultaneously which would make it easier to cater for all the official languages. ▪ Additional income can be channelled back into training and quality control.
<p>Disadvantages:</p> <ul style="list-style-type: none"> ▪ High initial capital layout. ▪ High maintenance of license fees.
<p>Conclusion:</p> <ul style="list-style-type: none"> ▪ Although the capital layout may seem high, this would be an investment that would become self-funding in a very short period of time.
<p>Output:</p> <ul style="list-style-type: none"> ▪ With 10 workstations and 10 subtitlers working at a time in shifts for 250 days a year, producing between 20 and 30 minutes of subtitles per day per workstation, the total number of hours of subtitles that can be created is estimated at around 1000 hours per year. ▪ at an income of approximately R140 per minute, this amounts to potential income of R8 400 000.

This would already point towards the possibility of a self-funding subtitling centre where the high cost of training can be recovered with products delivered at market-related prices.

In all of this it remains essential to liaise with studios, production houses, and broadcasters in order to establish a strong network of suppliers and clients and to align the training of subtitlers with the demands and constraints of the market.

4.3 Concept curriculum for subtitling training in South Africa

4.3.1 Aims and objectives

The main **aims** of any training programme in subtitling in South Africa should be the following:

- To introduce candidates to the history, parameters and nature of the different modes of subtitling.
- To introduce candidates to the relevant aspects of audiovisual media and mass media.
- To develop the skills and knowledge for creating subtitles for different user groups.
- To develop professional skills for subtitling in South Africa.

The more specific **objectives** of a training course for subtitlers in South Africa should include the following:

- **User groups**
 - To introduce candidates to the diverse nature of the subtitle user groups in South Africa, including matters such as deaf awareness, linguistic, cultural, educational and demographic differences.
 - To familiarise candidates with ways to collect reliable viewer feedback, such as qualitative and quantitative surveys.
 - To equip candidates with the skills required to analyse viewer feedback and translate this into subtitling requirements.
 - To enable candidates to compile comprehensive subtitle user group profiles that are updated on a regular basis.

4.3.2 Course content/curriculum

Table 4.3 below presents a basic course outline for an honours course, and table 4.4 for a short course based on the above aims and objectives as well as the parameters discussed in chapter 3.

The honours course should be presented over one year as part of a general honours programme in language practice. Additional subjects should include the theory of language practice, translation and text editing, linguistics for language practice, and film studies.

Table 4.3 Course outline: Honours course

Module	Duration in weeks (10 hours per week)	Content	
		Theory 4 hours per week	Practical 6 hours per week
1. Audiovisual media and media translation	2 weeks	Introduction to audiovisual media: film and television	General text reduction on paper
		Media translation: subtitling vs. dubbing	
2. User groups	2 week	Definition of user groups Analysis of user-group needs	<i>Examples from TV and DVD</i>
2. Subtitling parameters and guidelines	4 weeks	Subtitling parameters: Aural comprehension Transcription Reduction/adaptation – number of characters Reformulation/synonyms Text distribution	<i>Basics of subtitling on word processor and Supersubs</i>

		Subtitling guidelines: standards	
3. Creating subtitles	2 weeks	The principles of cueing: Minimum and maximum duration Rhythm Reducing “visibility”/obstruction	<i>From transcription to cueing on Supersubs</i>
			<i>Cueing on Cavena STWin Pro</i>
4. Subtitling delivery	2 weeks	Revising subtitles	<i>Editing on Supersubs</i>
			<i>Editing on Cavena STWin Pro</i>
5. Subtitling aids	1 week	Audiovisual translation aids: The internet Conventional aids Scripts, screenplays and dialogue lists	
6. Practice	13 weeks	Project (9 weeks) Internship (4 weeks)	

The short course should preferably be presented over a period of two weeks of contact sessions divided by a period of between two and three months of guided independent work. During the two weeks of contact sessions, candidates will receive an average of 6 hours contact per day, amounting to a total of 60 contact hours. The independent work will take up approximately 40 hours.

Table 4.4 Course outline: Short course

1.2.3.0.0.13819496.1236308 odule	Duration in days (6 hours per day)	Content	
		Theory 2 hours per day	Practical 4 hours per day
1. Audiovisual media and media translation	1 day	Introduction to audiovisual media: film and television	General text reduction on paper
		Media translation: subtitling vs. dubbing	
2. User groups	1 day	Definition of user groups Analysis of user-group needs	<i>Examples from TV and DVD</i>
2. Subtitling parameters and guidelines	3 days (2 during week one and 1 during week 2)	Subtitling parameters: Aural comprehension Transcription Reduction/adaptation – number of characters Reformulation/synonyms Text distribution	<i>Basics of subtitling on word processor and Supersubs</i>

		Subtitling guidelines: standards	
3. Creating subtitles	2 days	The principles of cueing: Minimum and maximum duration Rhythm Reducing “visibility”/obstruction	<i>From transcription to cueing on Supersubs</i>
			<i>Cueing on Cavena STWin Pro</i>
4. Subtitling delivery	2 days	Revising subtitles	<i>Editing on Supersubs</i>
			<i>Editing on Cavena STWin Pro</i>
5. Subtitling aids	1 day	Audiovisual translation aids: The internet Conventional aids Scripts, screenplays and dialogue lists	
6. Practice	40 hours	Project	

4.3.3 Reading

The reading matter for these courses would include the following:

4.3.3.1 Prescribed reading

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Pretoria: PANSALB. (Unpublished report).
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reference to Dennis Potter’s “Lipstick on Your Collar” Part 1. *Translation
Journal*, 7(1), January. [Available on internet at:
<http://accurapid.com/journal/22subtitles.htm>] [Date of access: 25 January
2003].

4.3.3.2 Recommended reading

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- Olivier, J.A.K. 2003. Die moontlikhede wat onderskrifte die SABC-TV bied in die erkenning en beskerming van taalregte. Vanderbijlpark: PU for CHE. Unpublished MA dissertation.
- Ratcliff, J. 1993. Timecode: A user's guide. Newton, MA: Focal Press.
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4.3.4 Evaluation

Evaluation is an important part of any course in language practice. In the case of subtitler training, candidates should be encouraged to develop skills in self-evaluation that will be supplemented by peer-evaluation and regular evaluations of random examples from film or television. In terms of the evaluation of practical projects, the following grid could serve as a starting point.

Table 4.5 Evaluation grid

Category	Explanation	Weight
Transcription	Accuracy	10
Subtitle distribution	Line-to-line, page-to-page	20
Linguistic	Correct spelling, language rules	10
Punctuation	Accuracy, disturbance factor	10
Cueing: Subtitle duration	Minimum vs. maximum	10
Cueing: Rhythm	Relation to film rhythm, sound rhythm, respecting of boundaries (shot, scene, music).	20
Overall impression	Are the subtitles unnecessarily "visible" (barrier) or do they serve as aid for conveying the content of the film more effectively?	20
Total		100

It has to be emphasised that the only evaluation that will truly prepare candidates for the practice of subtitling, will be related to real-life projects completed in internships. In this regard the subtitling centre proposed in this study could play an important role.

The parameters and curriculum discussed here have to some extent already been applied in subtitler training in an honours course at the Vaal Triangle campus of the Potchefstroom University in 2002 and 2003, as well as in a series of courses conducted during 2001 and 2002 (see Addendum A). Nevertheless, the curriculum will have to be revised with a view to incorporating a subtitling centre.

5. Conclusion

This project sought to investigate ways in which to address the unique challenges facing South Africa as developing country in terms of the large-scale introduction of subtitling. The main argument centred on the training requirements for South Africa in terms of subtitling and how subtitlers can be trained most effectively in both the short and long term.

The study concludes that such training can only be done with exacting attention to the needs of the different user groups in the country. In this regard it was established that subtitler training can be instrumental in the development and status of all official languages in South Africa as well as in providing in the needs of the deaf community.

The most important point arrived at in the study is that both the long-term and short-term training goals that have to be achieved in order to establish subtitling as a permanent force in all spheres of South African life will be dependent on two main factors. Firstly, in order to optimise the impact of subtitling, subtitlers will have to undergo intensive training in the linguistic and technical aspects of subtitling. Secondly, if subtitling is to be introduced responsibly, a subtitling centre has to be established as a point of co-ordination for training and production.

The findings of this study will have to be implemented over the medium term in order to create avenues for further research on the role subtitling can play in the South Africa society in terms of language status and language rights (also those of the deaf community), literacy training, and education.

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ADDENDUM B

SOUTHERN AFRICAN LINGUISTICS AND APPLIED LANGUAGE STUDIES

INSTRUCTIONS TO AUTHORS

Southern African Linguistics and Applied Language Studies publishes contributions from any of the disciplines in linguistics, both theoretical and applied. The following types of articles will be considered for publication: research articles, reporting on research that fulfils the criteria of a generally accepted research paradigm; review articles, which critically evaluate the research done in a specific field; short communications, very short research articles, or condensed reports on new and meaningful results that warrant urgent publication and that may appear in a more comprehensive article at a later stage; book reviews, concise objective evaluations of books that have recently been published will be solicited by the Reviews Editor.

Contributions may be in any of the 11 official languages of South Africa. All articles must be accompanied by an abstract not exceeding 200 words in the language of the article. Articles in languages other than English must be accompanied by an abstract in English and an extended English summary (500–1 000 words).

All articles should be submitted to the Editor, Bertus van Rooy, School of Languages, Potchefstroom University for CHE, Private Bag X6001, Potchefstroom 2520, South Africa, and all reviews should be submitted to the Reviews Editor, Gerhard van Huyssteen, at the same address. All articles will be submitted to referees.

Contributions published in Southern African Linguistics and Applied Language Studies become the copyright of NISC Pty Ltd, but authors bear sole responsibility for the factual accuracy of their papers. Only original contributions will be considered for publication.

Presentation:

Three copies of the manuscript should be submitted to the Editor. The copies must be submitted on A4 paper, in 1.5 spacing and margins of 30mm on all sides. The lay-out should conform to the following sequence: title page with title, author's name(s), address(es), e-mail address(es), the name and address of the author to whom correspondence should be addressed, and the abstracts. The article itself should commence on a new page and pages should be numbered. A recent issue of the Journal should be consulted for topographical conventions. Footnotes must be avoided. If notes are used, they should be numbered as unparenthesised superscripts and appear at the end of the text under the heading 'Notes'. The numbers must be placed to the right of any punctuation in the text. Examples must be numbered consecutively as they appear in the text. The numbers should be parenthesised and placed next to the left-hand margin. Alphabetical numbering may be used in addition, where examples need to be contrasted or compared with each other. If necessary, an appendix should appear at the end of the article. The final and accepted manuscript should be submitted on disk, accompanied by an identical printed copy. MS Word, WordPerfect or ASCII text format should be used.

Title: This should be concise, but sufficiently informative for use in title lists, or in coding for information storage and retrieval. The title should not exceed 12 words.

Author(s): Should an author's address have changed since the research was out, the

new address must be given as a footnote.

Abstract: All articles must be accompanied by an abstract of no more than 200 words in the language of the article. Articles in languages other than English must also be accompanied by an English abstract (maximum 200 words). The abstracts should indicate the content of the article factually and concisely and should be suitable for separate publication and adequate for indexing. The English abstract must always appear first, followed by the abstract in the other language.

References: References in the text should be cited as follows 'Brown and Gold (2000) stated ...' or '... (Brown & Gold, 2000)', when giving a reference simply as authority for a statement. In works by more than two authors the surname of the first author followed by et al. is given. Page references to a book in the text should be given as '... (Brown, 1999: 40–51)' or 'Brown (1999: 40–51) suggests...'. Reference to an item in a newspaper is cited as '... (Daily News, 2000)'. A list of only those publications to which reference has been made in the text must be presented alphabetically according to the authors' surnames and chronologically under each author, with a, b, c etc. when more than one reference per year from the same author(s) is involved. Examples:
Bailey LA & Timms L. 1976. More on women's and men's expletives. *Journal of Anthropological Linguistics* 18(3): 21–29.
Labov W. 1969. *The Social Stratification of English in New York City*. Washington D.C.: Centre for Applied Linguistics.
Human Sciences Research Council. 1978. *Analysis of Computer Speech*. Pretoria: Government Printer.
The Daily News, Durban, 8 August 2000.

Tables: Accompanying tables should be presented on separate A4 sheets and assigned chronological Arabic numerals and short descriptive titles in English, and the language of the article, if the article is not written in English. Wherever possible, tables should be arranged to fit the page within the dimensions of the printed page (200 x 142mm). Tables may include up to five horizontal lines but no vertical lines.

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ADDENDUM C

GUIDELINES FOR ARTICLES FOR 'PERSPECTIVES'

Articles submitted for publication in 'Perspectives' should follow the below guidelines.

Articles can be submitted electronically to (a) wangning@tsinghua.edu.cn, or (b) cay@hum.ku.dk. One hard copy should be forwarded by surface mail.

Articles sent by surface mail should first be submitted in three paper printouts for easy pre-screening, refereeing and editorial work. Contributors receive an acknowledgement that the article has been received. Pre-screening and refereeing may take up to six months. Take note that articles accepted for publication are subjected to close linguistic scrutiny and that there may be numerous suggestions for emendations in the copy returned to you.

Contributors have to consider the emendations themselves and make the appropriate changes in the manuscript. Revised articles are read independently of the comments made previously. The manuscript and a diskette or an electronic copy should then be sent to the editors.

On the diskette

Please name the file with your surname (because this is needed for keeping track of your article), and please keep 'Notes' and 'Works cited' on separate files as well: your name-article + your name-notes + your name-works.

We do not use footnotes. This is why we wish to have works cited and notes on separate files.

Please use Word 98, 2000, WordPerfect, or 'general' or ASCII files (in the latter case, please send us a printout on which you encircle words and phrases which you would like to have formatted in special ways (bold or italics. **DO NOT UNDERLINE**)). We may not comply with your wishes, but we shall do our best. Deviations have to do with the fact that we wish to ensure uniform formatting.

We do not use numbers in subheadings, but operate only with bold and italics in order to ensure a uniform layout. Numbers in subheadings are done away with without mercy.

The language of publication is English. Quotations in other languages must be either mediated or translated. For non-Latin languages, the following guidelines are to be observed: the original should be given with a transcript in Latin letters and with a back-translation. The transcript is to be given in parenthesis and the back-translation into English in brackets as follows: [literally: xxx]. Prime importance is given to clarity of the issue discussed and the cogency for scholars who are not versed in non-Latin script. Writers using e.g. Cyrillic letters, Arabic or Chinese characters must have these followed by a transcription (so that readers can have some idea of the phonetics), and then, finally, an English back-translation.

Abbreviations and acronyms should be avoided, no matter how wellknown: 'target language' and 'source language' are spelled in full. We are concerned with communicating information, not with constructing puzzles. Also, take note that most readers are not familiar with Latin and that our international readership is not confined

to Europe . The only Latin abbreviations accepted are 'e.g.', 'vs', and 'etc.'. All others should be written out. Also avoid slashes: and/or etc.

Avoid impossible and illogical statements such as "foreign readers can often only read the original in a translation", "The colloquialisms of the original have been toned down in the translation," and "this translation changes the original completely." Statements of this type will lead to rejection of your submission.

Titles

Titles should be brief. **Five words is the maximum** . A longer title can be absorbed in the abstract. We suggest this is done before submission.

Works cited

Please check the works cited, so that you have all information, including place of publication and publishers' names, and the first and last page of articles in journals. Please follow the formatting of 'Perspectives', that is, family name first, then first names (in full). With multiple authors the first name is given first with author or editor no. 2, 3 etc. They are connected with & (you will understand that it is not satisfactory for co-authors to be listed as 'et al.' or with their first names in the wrong position). Also take note that it is not only more polite but also helpful to librarians and people who want to use your references to spell out the first names of the authors in full. However, in the main text, names of multiple authors are combined with 'and', and, except when somebody is mentioned the first time, they should also appear without first names: First mention "Susan Bassnett argues that ... (Bassnett 2000). ... Later Bassnett states that ..." (Bassnett and Lefevere 2001: 23).

Clarity is the guiding principle. Therefore the name(s) of authors must be written out in full at each entry. Lines to indicate repetition of names of authors are not accepted in the **Works cited** .

In case you refer to journals not widely known, we would like to provide the name of the town or country of publication.

Web sites

Addresses of web sites should be arranged after the 'traditional Works cited' in alphabetical order. Then they should be numbered:

1. www.el
 2. www.hp
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Notes

Notes are always endnotes. Please remember that they should be listed on a separate file. They are always given after the punctuation mark. 1 You do this by pressing 'Control' and '+' in Word.

Notes are not acceptable in the title, but in case you want to acknowledge a grant or other help, this can be done in a final note, in the very first note or an unnumbered note at the beginning of the footnotes.

In the practical editing, we may

- suggest expansions where we find it difficult to get the picture without such explanation.
- suggest deletions when information is repeated, superfluous, and the like.

- suggest changes, notably where we find that the manuscript relies too much on the oral mode (there is no eye-contact when you write an article) or we find the phrasing infelicitous.

We are trying to establish homogeneity in terminology (interpreting vs interpretation, rendition (of an interpreted speech) vs rendering (of a story), pedagogics vs methodology (which is all too ambiguous), receiver of message or recipient vs receptor culture).

Take note that you can easily make for variation by e.g. using the plural ("translators" instead of "the translator"), by varying between synonyms (e.g. "recipients" - "audience(s)" - "readers" (with written translation)), "recipients" - "listeners" - "delegates" - "audience" (in interpreting); and the terms source and target language can often be substituted by citing the languages you are actually referring to.

Please check the following:

- “...” for quotations (and excerpts from quotations) in the source or original language.

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We do not like shashes unless absolutely essential. In the vast majority of cases 'or', 'and', 'but', or 'versus (vs)' do the job more elegantly and with more clarity.

Please check quotations. We have no chance of checking them. Please remember to indicate all pages quoted. Take note that for the sake of clarity each reference should be unambiguous (Walter 1999: 34)... (Walter 1999: 34): **NOT** (Walter 1999: 34)... (ibid.) Don't forget, speakers of Latin are an endangered species.

Please indicate whether there is some special formatting in your manuscript which you would like for some reason or other. We may disregard this, but we would like to be notified.

Please try and use gender-neutral language . **We suggest the plural.**

Please make your opening obvious.

Please make your conclusion clear.

Please avoid pleonastic and imprecise phrases.

Please do not use abbreviations, no matter how wellknown.

Please take note that titles of more than five words are usually more misleading than precise. You can explain the position at more length in the abstract.

Please add an abstract of 100-150 words at the beginning of the article.

Please take note: for the sake of uniformity, we have decided that all punctuation comes at the end of quotations: “... in target languages.” (Spendabel 1985: 45) Similarly, as mentioned, endnotes are placed after the punctuation marks. 1

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Bowker, Brian. 2002. *How to do a perfect translation* . The Hague : Millenium Publishers.

Cowper, John Stuart. Forthcoming. Gate-keeping in simultaneous interpreting. In: Yates, Frederick (ed.). *The Proceedings of the bicentennial moose conference*.

Jensen, Niels & Jessica Jones (eds.). 1999. *The next millenium in translation* . Yukon : Moose Press.

Hanssen, Jenifer. 1998. How to construct a new language. *Verbal signs* 18. 37-52.

Stefanopoulous, Michalis. 1995. xxxxx [= *The translation of pronouns*] [Unpublished PhD-thesis. University of Mons].

Vanessi, Jupiter. 1999. Visions of interpreting. In: Jensen, Niels & Jessica Jones (eds.). 122-134.

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Line spacing 1.2 (In 'Word' enter 'Format' > Paragraph > Line-spacing > Multiple > 1.2)

Page set-up: In 'Word' enter 'File' > Page setup > Margins. Top: 3.6. Bottom: 5.5. Left: 3.6. Right: 3.6. Header: 2.0. Footer: 2.0.

Thank you.

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The final version of your article is proof-read by a native speaker of English. The manuscript is returned to contributors only in case we think there are ambiguities which we cannot clear up.

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1. And they are always endnotes

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