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About the Journal

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The Interdisciplinary British and American Studies Journal (IBAS Journal) is a rigorously *double-blind peer-reviewed, biannual international* academic journal that fosters innovative scholarship in countries with British and American literary traditions. IBAS Journal welcomes submissions from scholars, researchers, and advanced graduate students working across disciplines, including *literature, language, culture, and society* of Britain and America. We are particularly interested in any kind of scholarly work from the Medieval Age to the present day. Our goal is to foster a deeper understanding of Britain and America through research conducted in a global context, including those from non-Anglophone countries.

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30.06.2026

Dear Distinguished Readers and Contributors,

As we present the first issue of 2026, we reaffirm the core identity that has defined the *Interdisciplinary British and American Studies (IBAS) Journal* since its inception. Our journal serves as a platform where researchers from across the globe—from independent scholars to established professors—analyze British and American cultures, societies and language through their own unique, non-native lenses. *IBAS* operates on the premise that the most profound insights into a culture often emerge from those observing it from the outside, fostering a scholarly environment where "the center" is re-evaluated through the diverse cultural, social, and political filters of our international contributors.

This mid-year issue stands as a testament to that ongoing commitment, bridging voices from West Asia, Eastern Europe, and the Balkans:

Elona Limaj, Dhurata Lamçja, Gilberta Hadaj (Albania) evaluates the shifting landscape of foreign language learning by analyzing the impact of contemporary translation tools.

Taras Yurchenko (Ukraine) delves into the linguistics of cultivation, providing a fascinating analysis of naming strategies in the nomenclature of fruits and berries, proving once again that scholarly inquiry knows no borders.

İsmail Kuruhalil and **Ömer Avcı** (Türkiye) address a critical social imperative by examining the situation of disabled individuals in disasters, analyzing the protective roles of social work in the light of the *Americans with Disabilities Act*.

Sarah Abdulrahman Khuder (Iraq) presents a rigorous feminist literary analysis of Ibsen's influence, deconstructing the patriarchal structures in *Hedda Gabler* and *A Doll's House*.

Ömer Faruk Yılmaz and **Abdülbaki Yılmaz** (Türkiye) explore the intersection of Multimodal Translation Theory and Dynamic Equivalence, offering a scene-based comparative analysis of *Hotel Transylvania*.

To maintain the highest standards of academic integrity and objective peer review, we strictly adhere to a policy where no more than 25% of our Editorial Board members may publish in a single issue, and a maximum of 2 articles from the same institution are accepted per issue. Having been indexed in the Index Copernicus Master List, *IBAS Journal* continues its trajectory toward further prestigious international indexes throughout 2026.

We are also pleased to announce a significant expansion of our Editorial Board. By welcoming esteemed scholars from Spain, Romania, and Jordan, we have further enriched our intellectual diversity. These new appointments are a strategic step in broadening our global perspective and deepening the quality of our cross-continental dialogues, ensuring that IBAS remains a hub where diverse academic traditions intersect.

A Vision for 2026

As the IBAS family, we look forward to a second half of the year defined by scholarly cooperation and intellectual harmony. In a time of global uncertainty, we hope that the coming months bring peace and a spirit of collaboration to all corners of the world. May this period be one where dialogue triumphs over discord, and where the universal language of literature, language studies, and social science continues to unite us all.

We thank you for being a vital part of our growing academic community.

Prof. Dr. Michael Bilynsky

Honorary Editor

Ivan Franko National University of Lviv

Interdisciplinary British and American Studies Journal

On Behalf of the Editorial Board

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Impact of Translation Tools in Foreign Language Learning

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abstract

New technologies are replacing each-other at a really rapid pace. Progress and modernism are affecting all fields, including education. Whiteboards and computer classes, which until a few years ago were considered advanced technological tools are becoming updated, because the trend is going toward use of the latest technology (tablets and smartphones). Technological progress has created some digital tools as part of the translation process, which are being used by professionals and students. The latest are using various programs to gain knowledge and complete assignments in the most facilitated method. But, one of the challenges of education is the dependence of students on these tools, because their use can have both positive and negative effects on language learning. The scope of this work is to make evident the digital translation tools used during English language teaching and analyse their impact among students. In order to achieve this objective, a questionnaire is prepared and filled by 105 students. Questionnaire data shall be analysed in this work, where will be included also the respective recommendations. Translation tools have transformed foreign language education by providing immediate linguistic support and promoting learner autonomy. While these technologies can enhance comprehension and writing performance, excessive reliance may hinder the development of independent language skills. Therefore, effective pedagogical integration is essential to ensure that translation tools serve as learning aids rather than substitutes for language acquisition.

Keywords: *translation, digital, teaching, foreign language*

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INTRODUCTION

Translation in English Language Teaching (ELT) in Albania is updated constantly through the incorporation of new technology, from paper-based and electronic handheld resources and specialized software to online platforms and virtual forums, all of which can be used to facilitate the act of translating in the teaching/ learning process. With the use of 21st Century technology, old-fashioned methods can be adapted so that students can prepare to read both ancient and contemporary texts.

This study addresses two critical domains shaping Albania's future: education and technological innovation. It examines the necessary transformation of the national education system to foster inclusion and innovation through the strategic integration of artificial intelligence and digital tools, a field commonly referred to as educational technology.

Technological advancements have significantly mitigated language barriers. Progress in this field has introduced various digital tools into the translation process, which are now widely utilized by both professionals and students. These users increasingly employ diverse programs to acquire knowledge and complete academic assignments more efficiently. As the market for machine translation technology evolves rapidly, the quality of these solutions varies considerably. Common machine translation tools include Google Translate, Claude, DeepL, Microsoft Translator, Gemini, SDL Trados, and MemoQ. However, a significant challenge in contemporary education is the rising student dependence on these tools (Polakova & Klimova, 2023).

The aim of this study is to analyze university students' approaches to the use of translation tools in English as a Foreign Language (EFL) contexts, as well as the impact of these tools on their motivation and performance.

The high frequency of technology use suggests that digital tools are increasingly embedded in students' learning routines. Therefore, English language educators should integrate technology strategically into their instruction, promote digital literacy, and encourage students to utilize technological resources critically and responsibly. Furthermore, these findings support the development of technology-enhanced learning environments that foster learner autonomy, engagement, and language proficiency.

The integration of technology in education has significantly transformed teaching and learning processes across all educational levels. Digital technologies provide learners with greater access to information, interactive learning opportunities, and personalized educational experiences. Within language education, technological tools—such as online learning platforms, mobile applications, digital dictionaries, artificial intelligence applications, and translation tools—have become essential resources for supporting language acquisition and communication skills (Limaj, 2021).

RESEARCH OBJECTIVES

This study aims to:

1. Investigate the purposes for which students utilize digital translation tools in English language learning;

2. Examine students' perceptions regarding the benefits and challenges associated with the use of these technologies;
3. Analyze the impact of digital translation tools on students' language learning outcomes; and
4. Explore pedagogical strategies for integrating digital technologies into English language teaching.

The increasing integration of technology into education has fundamentally transformed foreign language acquisition. Among the available resources, digital translation tools have become prevalent in supporting vocabulary acquisition, reading comprehension, writing, and communication. Given their widespread adoption, it is essential to evaluate how these tools influence students' learning experiences and language development. Therefore, this study investigates the patterns of digital translation tool usage among English language learners and examines their perceived impact on the overall learning process.

LITERATURE REVIEW

Digital technologies are a key element of technological progress that significantly impacts various fields, including education (Ducar & Schocket, 2018). Their impact on neurological processes is creating new paradigms in how information is processed and stored.

As McEnery and Brookes (2024) observe in "Curricula with a focus on technology and foreign languages," the increasing use of technology is transforming pedagogical practices, often triggering mixed opinions from assessors regarding students' written work (Clifford, 2013). This challenge is particularly relevant for international students who must function in a global, English-speaking environment. In this context, relying on such software is often regarded as potentially compromising the authenticity of authorship (Mundt & Groves, 2016).

Research suggests that students utilize these tools not merely to alleviate language-learning fatigue but as constructive aids for promoting the communicative competence required for global participation (Hyland, 2014). Translation and language-checking tools, such as Google Translate and Grammarly, provide increasing accuracy, enabling students to correct or translate texts with generally comprehensible results.

Historically, translation in foreign language classrooms transitioned from medieval Scholasticism and 19th-century grammar-translation methodologies to being recently conceptualized as a cognitive paradigm—the "act of translating" (D'Amore, 2015). Modern language teaching now favors oral communication and naturalistic acquisition methods, supported by digital platforms that simplify assignment management and communication.

While students enthusiastically adopt machine translation, educators often express skepticism, even when studies indicate improvements in reading, vocabulary, grammar, and writing. Translation technology is now an inescapable reality. Recent studies on ChatGPT have highlighted that these AI tools can effectively support second-language writing instruction (Abimbola, 2023), although they present risks regarding independent critical thinking and the preservation of personal voice.

The integration of technology in education has become a defining characteristic of contemporary pedagogy, expanding access to resources and facilitating student-centered learning. Digital tools now facilitate communication, collaboration, and immediate feedback. Consequently, technology has become an essential component of English language instruction; however, educators must ensure it serves as a complement to, rather than a replacement for, meaningful language learning activities (Klimova, 2025).

METHODS AND DATA

The aim of this study is to examine the use of digital translation tools in the English language learning process and analyze their impact on students. To achieve this objective, a questionnaire was administered to 105 students; 99 valid responses were included in the analysis, resulting in a response rate of approximately 94.3%. Incomplete or invalid submissions (n=6) were excluded. The sample comprised Bachelor and Master students from four universities (two public and two private), predominantly located in Tirana, Albania, due to the concentration of technological development in this region. To ensure validity, the questionnaire employed various question formats.

This study employed a quantitative survey research design. Data were collected via a structured online questionnaire created through Google Forms, focusing on the frequency of tool usage, the types of tools utilized, the purposes for their use, and students' perceptions regarding the associated benefits and challenges. The items were measured using multiple-choice questions and five-point Likert scales.

All participants were informed that the survey was anonymous and voluntary, and that the data would be used exclusively for research purposes. The collected data were analyzed using descriptive and inferential statistical techniques, including frequencies, percentages, means, and standard deviations. Ethical considerations were strictly observed, ensuring participant confidentiality and data protection in accordance with university protocols.

The research hypotheses are as follows:

- **H1:** There is a significant difference in language learning outcomes between frequent and infrequent users of translation tools.
- **H2:** Translation technology has a significant influence on student learning.
- **H3:** Teachers are actively integrating translation tools into classroom instruction.

Finally, inferential statistical techniques were employed to analyze the correlation between tool usage frequency and students' proficiency in foreign language learning (Council of Europe, 2024).

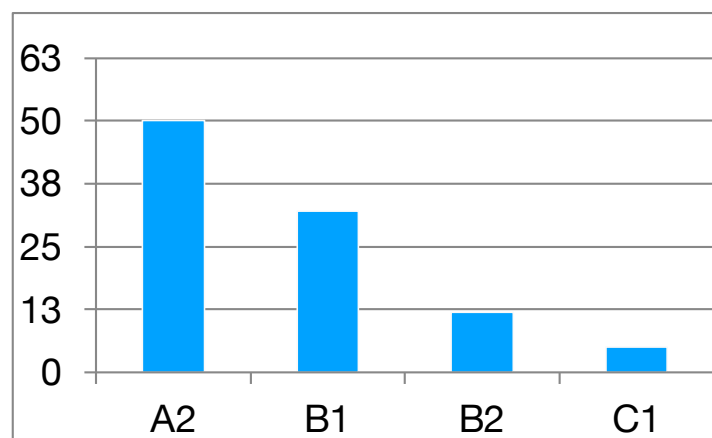
ANALYSIS

The study primarily analyzes the use of translation and language-correcting software. The initial questions focused on demographic data, e.g., level of study, gender, and English language proficiency. The data analysis showed that the majority of respondents were Bachelor students (62%). The majority of students who participated in the questionnaire were female and mainly

resided in Tirana, the capital city of Albania.

The largest share of respondents had an intermediate level (B2) of English language proficiency, according to the CEFR (Council of Europe, 2024). The results indicated that *Google Translate* is the most popular translation tool, followed by *ChatGPT*, *Claude*, and *Gemini*. Regarding the frequency of use, only C1-level learners stated that they never use translation tools, whereas A2-level learners reported a significantly higher frequency of use.

Figure 1



Analysis of Language Proficiency Distribution

The data obtained from the questionnaire indicate that the majority of participants possess lower to intermediate levels of language proficiency. The largest group is at A2 level, comprising 50 participants (50.5%), suggesting that approximately half of the sample demonstrates basic communicative competence and may still experience difficulties with complex texts and specialized vocabulary.

Participants at B1 level account for 32 individuals (32.3%), representing nearly one-third of the sample. These learners are generally able to manage everyday communication and understand straightforward texts, although they may still require support when dealing with more advanced language tasks.

Only a small proportion of participants demonstrate upper-intermediate or advanced proficiency. Twelve participants (12.1%) are classified at B2 level, while five participants (5.1%) are at C1 level. Together, these higher-proficiency groups constitute just 17.2% of the total sample.

Interpretation in Relation to Translation Tool Usage

The predominance of A2 and B1 learners (82.8% of the participants) suggests a substantial reliance on translation tools to facilitate comprehension, vocabulary acquisition, and communication. Individuals at lower proficiency levels often utilize translation technologies to compensate for linguistic limitations, particularly when engaging with academic, professional, or complex written materials.

Conversely, participants at B2 and C1 levels likely utilize translation tools more selectively. Their usage may focus on verifying terminology, translating specialized content, or improving accuracy,

rather than supporting basic comprehension.

Overall, this proficiency distribution indicates that translation tools serve as a primary supportive resource for the majority of participants—particularly those at elementary and intermediate levels—while functioning as supplementary tools for more advanced users.

Suggested Academic Reporting Statement

The analysis of language proficiency levels revealed that the majority of participants demonstrated elementary to intermediate competence, with 50.5% at A2 level and 32.3% at B1 level. Higher proficiency levels were less common, with 12.1% at B2 and only 5.1% at C1. This distribution suggests that translation tools are likely to be particularly valuable for the majority of participants, who may rely on such technologies to support comprehension and communication in a second language. In contrast, advanced users may employ these tools primarily for refinement and terminology verification rather than basic language support.

Table 1 illustrates the purposes for which respondents use translation tools. According to the responses, these tools were primarily utilized for reading comprehension, grammar checking, and writing tasks. Furthermore, we conducted a descriptive association analysis to examine how students utilize translation tools across different academic tasks.

The findings indicate that translation tools were used primarily for reading-related activities (38%), followed by grammar-related tasks (31%). Together, these two categories accounted for 69% of all reported uses, suggesting that students relied on translation tools mainly for language comprehension and grammatical support. Usage was considerably lower for completing assignments (12%) and writing tasks (11%), while only a small proportion of students reported using translation tools for other purposes (9%).

Table 1

Descriptive Distribution of Translation Tool Usage (N = 99)

Purpose of Use	Percentage (%)	Approximate Number of Students
Reading tasks	38%	38
Grammar tasks	31%	31
Completing assignments	12%	12
Writing tasks	11%	11
Other tasks	9%	

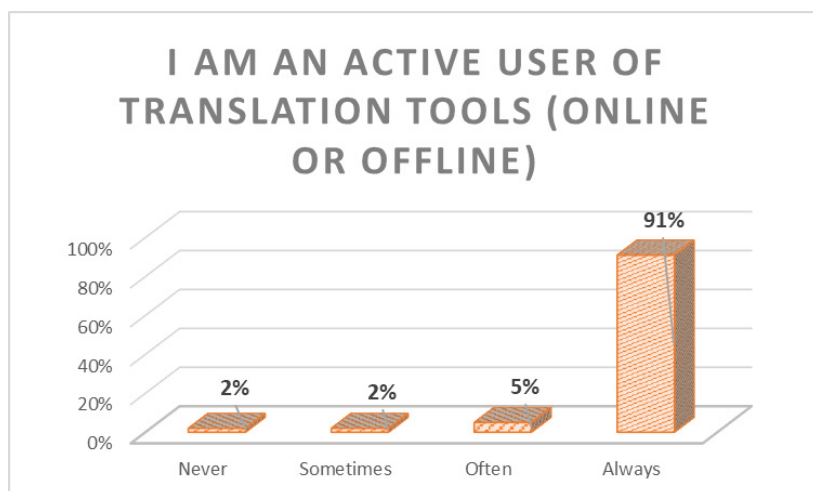
In the framework of an inferential statistics for the same questions, following Chi-square goodness-of-fit test, where we the observed frequencies (38, 31, 12, 11, 9) and an expected equal distribution (19.8 per category): $\chi^2 = 35.13, \text{quad } df = 4, \text{quad } p < .001$.

The obtained results can be interpreted as the distribution of translation tool use across task types differed significantly from an equal distribution, indicating that students preferentially used translation tools for reading and grammar tasks rather than for writing, assignments, or other

purposes.

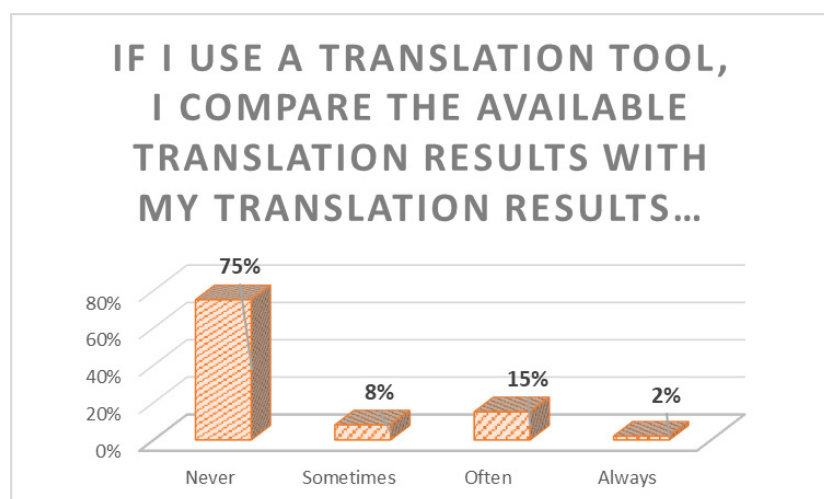
A chi-square goodness-of-fit test showed that the distribution of translation tool use across academic tasks was significantly different from an equal distribution, $\chi^2(4, N = 99) = 35.13, p < .001$. Reading tasks (38%) and grammar tasks (31%) were the most common purposes for using translation tools, whereas completing assignments (12%), writing tasks (11%), and other purposes (9%) were reported less frequently.

Figure 2



In case of a correlation analysis, if we compare frequency of translation tools usage by students, a Spearman correlation analysis was conducted to examine the relationship between students' frequency of translation tool usage and their writing performance. The results indicated a significant positive correlation ($\rho = .42, p < .01$), suggesting that students who used translation tools more frequently tended to achieve higher writing scores.

Figure 3



The results indicate that translation tool usage was extremely common among the participants. Of the 99 students surveyed, approximately 90 (91%) reported always using translation tools, 5 (5%) reported often using them, 2 (2%) reported sometimes using them, and 2 (2%) reported never

using them. These findings suggest a very high level of reliance on translation tools among the students.

The data analysis shows that majority of the interviewed students said they “always use the translator tool to translate single words”, thus becoming over-reliant on translation technology, because it is harder and longer to translate texts manually using a printed dictionary. Instead of remembering vocabulary, students prefer using translation tools, i.e. words and sentences are not stored in their brain memory. While, teachers aim to stimulate the brain by watching it over in order to memorise.

Results show that technology increases students confidence, in particular during use of translation tools, because a considerable number of the interviewed students underlined that it “feels like, without a translation tool, I cannot understand English texts”. While there is an overwhelming majority of students stating they “memorise English vocabulary, after obtaining answers from translation tools”, teachers must advice students to avoid becoming over-reliant on these tools.

Figure 4

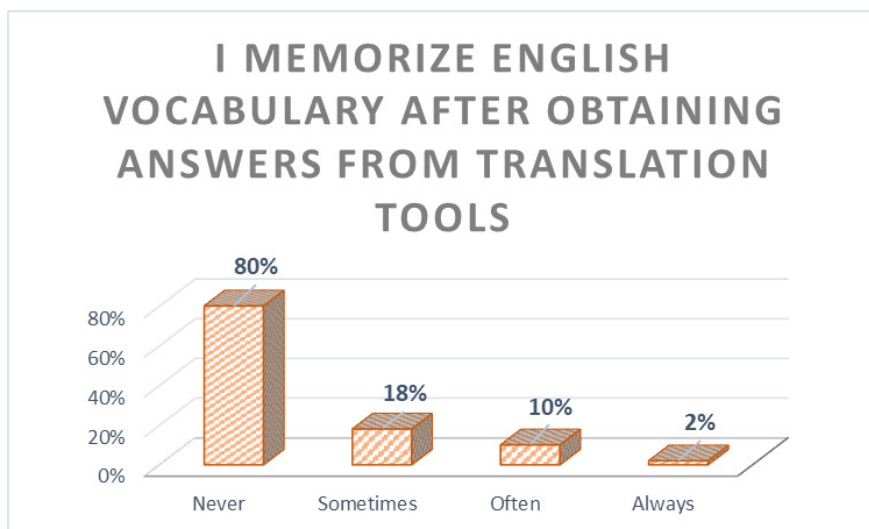


Table 2

We have categorized users into two groups and completed a Chi-square Goodness-of-fit Test.

Group	Frequency
High Users (Always + Often)	95
Low Users (Sometimes + Never)	4
Total	99

Null hypothesis (H_0): High and low users are equally distributed (49.5 expected in each category).

Observed frequencies:

- High Users = 95
- Low Users = 4

Expected frequencies:

- High Users = 49.5
- Low Users = 49.5

Using the formula:

$$\chi^2 = \sum \frac{(O-E)^2}{E}$$

Calculation:

- High Users: $(95 - 49.5)^2 / 49.5 = 41.83$
- Low Users: $(4 - 49.5)^2 / 49.5 = 41.83$

$$\chi^2 = 83.66$$

Degrees of freedom:

$$df = 2 - 1 = 1$$

A chi-square goodness-of-fit test indicated that the distribution of translation-tool usage differed significantly from an equal distribution, $\chi^2(1, N = 99) = 83.66, p < .001$.

For a 2-category chi-square, the effect size can be expressed using Phi (ϕ):

$$\phi = \sqrt{\frac{\chi^2}{N}}$$

$$\phi = \sqrt{(83.66 / 99)} = 0.92$$

According to conventional benchmarks:

- 0.10 = small
- 0.30 = medium
- 0.50 = large

A ϕ of 0.92 represents a very large effect size.

A chi-square goodness-of-fit test was conducted to examine students' use of translation tools. Participants were classified as either high users (always or often using translation tools) or low users (sometimes or never using translation tools). Results revealed a highly significant difference in the distribution of usage patterns, $\chi^2(1, N = 99) = 83.66, p < .001$. The vast majority of students (96.0%) were classified as high users, whereas only 4.0% were classified as low users. The effect

size was very large ($\phi = .92$), indicating a strong tendency among students to rely on translation tools.

It should be noted that this test only demonstrates that usage frequencies across different academic tasks are not equally distributed. It does not establish a causal link or provide evidence regarding whether translation tool usage directly affects language proficiency. These broader implications remain beyond the scope of this descriptive analysis and warrant further inferential investigation.

Even though translation technology has significantly affected language learning, there is an ongoing debate about the use of technology and its impact on the foreign language teaching and learning process. There is no doubt that students admit that using a translation tool to complete English assignments is faster and easier than doing it manually.

The majority of them answered that they “use translation tools for all language purposes,” even though translation tools cannot accurately provide answers to all the required assignments. The results of the questionnaire clearly indicated that students use translation tools during their learning process to better understand texts, and to translate words and sentences.

Based on the obtained answers, it is obvious that there is a common opinion that translation tools provide excellent results; therefore, the majority of the participants stated that they do not use a printed dictionary to check the accuracy of the material.

Findings demonstrate that respondents use machine translation in foreign language learning for specific tasks such as reading or understanding a text, writing essays, searching for alternatives, and completing various assignments.

DISCUSSIONS AND RESULTS

Based on these results, this work can define the following positive and negative impacts that use of technologic tools has on foreign language teaching and learning process.

Positive Impacts

1. Enhanced Comprehension: Translation tools help learners understand unfamiliar vocabulary, grammar structures, and complex texts more quickly. This can reduce frustration and increase confidence, particularly for beginner and intermediate learners. This is also noticed in one of the questions in the questionnaire regarding

2. Increased Learning Efficiency: Students can access immediate translations, allowing them to focus on understanding content rather than spending excessive time searching for meanings. This can support reading, writing, and listening activities.

3. Support for Independent Learning: Translation tools enable learners to study autonomously outside the classroom. They can check meanings, verify their understanding, and receive instant feedback on written work. In this case, the results showed that majority of students participating in the questionnaire did not check the meanings in the dictionary, i.e. they are fully dependant on these tools.

4. Improved Writing Assistance: Many translation tools provide suggestions for vocabulary, sentence structure, and grammar. These features can help learners produce more accurate written texts and expand their linguistic repertoire.

5. Greater Accessibility: Translation technologies make foreign language learning more accessible for students with varying proficiency levels and learning needs.

Negative Impacts

1. Overreliance on Technology: Excessive dependence on translation tools may reduce learners' motivation to develop independent language skills such as vocabulary recall and grammatical reasoning.

2. Reduced Language Production: Students who rely heavily on automatic translation may engage less in active language construction, limiting opportunities to practice speaking and writing.

3. Translation Errors: Machine translation is not always accurate, particularly with idioms, cultural expressions, and context-dependent language. Learners may internalize incorrect forms if they accept translations without critical evaluation.

4. Limited Critical Thinking: Constant access to ready-made translations can discourage learners from using contextual clues, inference skills, and problem-solving strategies that are important for language acquisition.

5. Academic Integrity Concerns: The use of translation tools for assignments may raise concerns regarding plagiarism, authorship, and the assessment of genuine language proficiency.

Likewise, regarding pedagogical implications in this respect, we can highlight that language educators increasingly view translation tools as resources that should be integrated thoughtfully rather than prohibited. Effective practices used by teachers include:

- Teaching students how to evaluate translation accuracy.
- Using translation tools as a scaffold rather than a replacement for learning.
- Encouraging comparison between machine-generated and human-generated translations.
- Developing digital literacy skills related to language technologies.
- Designing tasks that require critical reflection on translated texts.

Potential Recommendations

1. Integration Rather Than Prohibition:

- Since translation tools are already widely used by students, teachers may benefit from integrating them into language learning activities rather than attempting to ban them.
- Instruction can focus on using these tools critically and effectively, helping students evaluate the accuracy and appropriateness of translations.

2. Development of Digital Literacy:

- Students should be trained to recognize the strengths and limitations of translation technologies
- Teachers can incorporate activities that require learners to compare machine-generated translations with human translations and identify errors or nuances.

3. Support for Autonomous Learning:

- Translation tools can facilitate independent learning by providing immediate access to vocabulary, grammar explanations, and text comprehension support.
- Teachers can encourage students to use technology as a supplementary resource while maintaining active engagement with the target language.

4. Focus on Higher-Order Language Skills:

- As technology increasingly assists with basic translation tasks, classroom instruction can emphasize critical thinking, intercultural competence, communication strategies, creativity, and authentic language use.
- Activities such as discussions, presentations, and collaborative projects can help students develop skills that technology cannot fully replace.

5. Need for Assessment Adaptation:

- Traditional assignments may need redesigning to account for the widespread availability of translation tools.
- Assessments can focus more on language production in authentic contexts, oral communication, and students' ability to justify linguistic choices.

6. Teacher Professional Development:

- Language teachers may require training on emerging translation and AI technologies to effectively guide students in their use.
- Professional development programs can help educators design technology-enhanced learning environments.

The findings reveal a very high frequency of translation tool use among students, with 91% reporting that they always use such technologies. This suggests that translation tools have become an integral part of contemporary language learning and this finding provides empirical support for the H1 hypothesis. Consequently, foreign language pedagogy should move beyond restrictive approaches and focus on developing students' digital literacy, critical evaluation skills, and strategic use of translation technologies. Furthermore, teachers should design learning activities and assessments that promote communicative competence and higher-order language skills while leveraging the benefits of technological support.

CONCLUSION

Innovation in other disciplines contributes to our understanding of the affect that translation has on our teaching practice. Behavioural data have demonstrated that native-language activation is an unconscious correlate of second-language comprehension and, therefore, that translation is an unconscious and inevitable element in foreign-language comprehension.

Preventing students from using translation-related technology is almost impossible, but we can consider these translation apps as means to perfecting reading skills in a foreign language and furthermore as an aid for consolidating writing and communication skills in the student's first language, which is also expressed in the research objectives of this work.

Nonetheless, translation used as a resource designed to assist the student in improving his or her knowledge of the foreign language through reading comprehension exercises, contrastive analysis, and reflection on written texts continues to be practiced.

As artificial intelligence-driven translation technologies advance, teachers are starting to warm up to using translation tools in reading tasks, during grammar-translation method or course works, as well as for translation of professional terminology.

The aim of this study was to explore the attitude of university students toward the use of machine translation tools in foreign language learning, as well as the impact of these tools on their motivation and performance. Taking into account the results of discussions on this topic, it is highlighted that translation apps can make classes more engaging and inclusive, in full compliance with topics included in the teaching program.

Classical language teaching in Albania placed translation on the centre of all the teaching/learning methods of a foreign language, but based on the results on this work, even nowadays, students make use of translation tools to complete their assignments. (Musai, 2016) Machine translation, specifically Google Translate is freely available on a number of devices and is improving in its ability to provide grammatically accurate translations. This development has the potential to provoke a major transformation in the internationalisation process of universities, since students in the future may be able to use technology to transform traditional language learning processes. While this is a potentially empowering move that may facilitate academic exchange and the diversification of the learner and researcher community at an international level, it is also a potentially problematic issue in two main respects.

Firstly, the technology is at present unable to align to the socio-linguistic aspects of university level writing and may be misunderstood as a remedy for deficiencies in the writer's language proficiency— a role it is not able to fulfil.

Secondly, it introduces a new dimension to the production of academic work that may clash with Higher Education policy and, thus, requires legislation, in particular in light issues such as plagiarism and academic misconduct.

Translation tools seem to be immensely beneficial for English-language learners (ELL) among students as they promote interaction across cultures and nationalities. The increased engagement is a strong response that students are more likely to engage actively in classroom activities.

These tools allow ELL them to participate in class discussions, ask questions and express their thoughts confidently, therefore fostering a more inclusive and interactive learning environment. Among other advantages of machine translation are multilingual communication, globalisation and elimination of language barriers.

Translation tools can significantly support foreign language teaching and learning by improving accessibility, comprehension, and learner autonomy. However, their benefits are maximized when used strategically and critically. Educators should guide students in using these tools responsibly to enhance language development while minimizing overdependence and potential learning limitations.

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From *Golden Delicious* to *Cabernet Carbon*: An Analysis of Naming Strategies in Fruit and Berry Cultivation

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abstract

This article investigates fruit- and berry- related naming practices in horticulture and viticulture from ethnolinguistic, phraseological, and onomasiological perspectives, focusing on English and German. The study examines how cultivar names encode sensory qualities, symbolic meanings, and culturally conditioned value systems, and how these elements interact with market-oriented strategies of nomination. Drawing on selected case studies of apple cultivars in English and German and fungus-resistant grape varieties developed in German-speaking regions, the analysis demonstrates that epithet-based and prestige-oriented naming models play a central role in shaping consumer perception. The findings show that fruit- and berry-related names reflect not only practical considerations of cultivation and breeding but also deeper metaphorical, sensory, and ethnocultural associations. The qualitative onomasiological analysis is complemented by a corpus-based investigation, which provides empirical evidence for regional variation in cultivar name usage and for the evaluative adjectives most frequently associated with selected variety names.

Keywords: *onomasiological approach, cultivar naming strategies, horticultural and viticultural nomenclature, ethnolinguistic symbolism, phraseological metaphor, sensory semantics, prestige-based naming, corpus linguistics*

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INTRODUCTION

Horticulture has accompanied all civilisations in which climatic conditions allowed the cultivation of fruit and berry crops, which functioned not only as sources of nourishment but also as elements of private and public ornamental spaces. Even today, many renowned gardens around the world are regarded as shared cultural treasures. History speaks of the Hanging Gardens of Semiramis as one of the Seven Wonders of the Ancient World, gardens that, according to legend, King Nebuchadnezzar built for his wife in Babylon, equipping them with an innovative and revolutionary irrigation system for its time and exceptionally rare in desert conditions (Dalley, 2013).

In everyday fruit-and-berry horticulture, which was not aimed at outstanding decorative achievements, the most important criterion and accomplishment was obtaining the best and most abundant harvest with minimal effort. Meeting these requirements became the central objective in selecting productive and stress-resistant genetic material. The successful selection of appropriate cultivars was further reinforced by proper presentation of the fresh fruit to customers, particularly through the development of names that highlighted the given variety's strongest qualities. Examples of such marketing strategies include apple cultivar names using adjectives that describe the best sides of given varieties, such as *Golden Delicious*, *Red Delicious*, or *Honeycrisp* in English-speaking regions (Janick & Moore, 1996, pp. 2–6). And words evoking prestige or status in German-speaking areas, such as *Gloster*, *Wellant*, *Kaiser Wilhelm*, *Topaz*, and others (Beratungsstelle für Obst- und Gartenbau, 2010).

The present study investigates selected English and German fruit and grape cultivar names from an onomasiological and ethnolinguistic perspective. The qualitative analysis is complemented by corpus evidence from the Global Web-Based English (GloWbE) corpus in order to examine regional variation in cultivar name usage.

Accordingly, the study addresses the following research questions:

1. Which conceptual features motivate fruit and berry cultivar names?
2. Which naming strategies characterise English and German horticultural nomenclature?
3. To what extent are these strategies reflected in corpus evidence and what conclusions can be made?

METHODOLOGY

The research employs a qualitative–quantitative design integrating onomasiological analysis, ethnolinguistic interpretation, and corpus linguistics. The qualitative component focuses on identifying the conceptual motivations underlying cultivar names, while the quantitative component examines patterns of usage in authentic English-language discourse.

The primary dataset consists of selected fruit and grape cultivars representing different naming strategies in English and German horticultural and viticultural traditions. The material was selected according to three criteria: commercial importance, representativeness of distinct naming models, and the availability of reliable descriptive and historical documentation. The analysed examples include English-language apple cultivars (e.g., *Golden Delicious*, *Honeycrisp*, *Red Delicious*, *Idared*), German apple cultivars (e.g., *Kaiser Wilhelm*), German fungus-resistant grape cultivars (PIWI varieties), and internationally recognised wine grape varieties discussed from an onomasiological perspective.

The qualitative analysis was conducted within the framework of onomasiological theory (Štekauer, 1998), according to which lexical nomination is understood as the selection of conceptual features that motivate the creation of new names. Particular attention was paid to sensory semantics, symbolic associations, references to cultural prestige, historical allusions, and marketing-oriented naming strategies. Ethnolinguistic interpretation was applied in order to examine how these names reflect culturally conditioned perceptions of quality, tradition, and value.

The quantitative component employed the Global Web-Based English (GloWbE) corpus (Davies, 2013), comprising approximately 1.9 billion words from twenty English-speaking countries. Exact-phrase searches were performed in December 2025 to determine the regional distribution of selected cultivar names and the most frequent adjectives associated with Golden Delicious. Frequency values were normalised per million words to ensure comparability across regional subcorpora.

The combination of qualitative and corpus-based approaches allows the study to relate conceptual naming strategies to observable patterns of language use. Rather than treating cultivar names solely as botanical designations, the analysis demonstrates their simultaneous linguistic, cultural, and commercial functions.

THEORETICAL FRAMEWORK

Fruit and berry lexemes occupy a prominent position within the conceptual systems of many languages owing to their long-standing importance in agriculture, nutrition, and everyday experience. Their familiarity has contributed to the development of extensive semantic networks that include literal, figurative, symbolic, and evaluative meanings. These semantic associations provide an important foundation for the creation of cultivar names, in which lexical choices frequently reflect desirable qualities such as sweetness, colour, abundance, prestige, or authenticity.

From an onomasiological perspective, the naming of cultivars represents a process of selecting those conceptual features considered most salient by breeders, producers, or marketers. As Štekauer (1998) argues, lexical nomination is motivated by conceptual characteristics that distinguish a given object from others within the same category. In horticultural nomenclature these characteristics often include sensory properties, geographical origin, historical associations, or symbolic value.

The interpretation of cultivar names may further be supported by ethnolinguistic approaches and conceptual metaphor theory (Lakoff, 1992), which explain how culturally shared associations become encoded in lexical choices. Rather than functioning merely as technical labels, cultivar names frequently evoke broader cultural expectations concerning taste, quality, tradition, or prestige. The following analysis examines how these conceptual motivations are realised in selected English and German fruit and grape cultivars.

RESULTS AND DISCUSSIONS: EVIDENCE FROM SELECTED CULTIVARS

The selected cultivar names demonstrate that horticultural and viticultural nomenclature is rarely arbitrary. Rather, the naming process reflects deliberate conceptual choices that foreground particular sensory, historical, cultural, or symbolic characteristics of a variety. By subjecting the naming examples above to an onomasiological analysis, we may conclude that the creative approach, reinforced by epithets and by the cultivar's genuine advantages, such as its appealing appearance and flavour, as in the case of *Golden Delicious* and *Red Delicious*, likely contributed

to the worldwide recognition of these varieties. Notably, *Golden Delicious* and *Red Delicious* have historically been among the most commercially influential apple cultivars in apple sales across Europe and the United States (Janick & Moore, 1996, pp. 2-6).

“The ‘Delicious’ apple (discovered in Iowa, 1872) still dominates United States production, and ‘Golden Delicious’ (found in West Virginia, 1905) dominates Europe.” (Janick & Moore, 1996, p. 6)

Additional parallels may be found in such commercially successful cultivars as *Gala*, *Pink Lady*, and *Fuji*, whose names were deliberately crafted to evoke pleasant sensory associations, elegance, or a connection to established geographic or cultural traditions (Janick & Moore, 1996, pp. 6). These examples demonstrate how naming functions as a marketing mechanism: it not only reflects a cultivar’s characteristics but also shapes consumer expectations and purchasing behaviour. Janick and Moore (1996) suggest that the apple market sets demands for “blemish-free apples and any amount of russet ... is considered a serious defect...”. Also, according to the same work, other aspects like colour and shape are taken into consideration and influence the geographical distribution of this fruit’s varieties.

In the context of onomastic analysis, the *Golden Delicious* apple variety provides a representative example of how naming and marketing considerations merge to result in an exceptional cultivar name. The adjective *Golden* evokes the fruit’s characteristic yellow colour while also activating broader cultural associations with ripeness, value, and excellence. The adjective *Delicious* explicitly evaluates flavour quality, creating an immediately positive consumer expectation. From both onomasiological and marketing perspectives, the name performs a dual function: it identifies the cultivar while simultaneously communicating desirable product characteristics and strengthening brand recognition (Janick & Moore, 1996, pp. 2–6).

Honeycrisp, from the perspective of associative name formation, focuses on two characteristics of the fruit, flavour, encoded in the word *Honey*, which refers to the English words *honey*, and *crisp*, to convey the apple’s qualities. The flavour is described as “very sweet and aromatic” (Benivia, 2023, p. 7). From this, we can conclude that the association with honey arises from the high sugar content and aromatic quality of the fruit, directly reflecting the cultivar’s advantages to enhance its marketability and increase recognition and demand.

Idared is an American cultivar whose name is an abbreviation indicating the origin, namely the institution of the breeder, and the external characteristics. This cultivar was developed at the Agricultural Research Station of the University of Idaho in 1942, from which the first part of the name, *Ida*, originates. The second component reflects the external appearance of the fruit, namely its red colour when ripe (Benivia, 2023, p.7).

The name of the German apple cultivar *Kaiser Wilhelm* illustrates a prestige-oriented naming strategy through the use of the imperial title Kaiser (Duden, n.d.). It was introduced at the beginning of the 20th century, and the name itself refers to the notion of the German Emperor Wilhelm I, evoking figurative connections to status, authority, and reliability. Contrasting with tangible descriptive epithets that rely on sensory perception, this naming strategy is based on symbolic and historical associations, establishing a connection between the variety’s name and Germany’s cultural and social ideas, while also reflecting the cultivar’s German cultural background. (Beratungsstelle für Obst- und Gartenbau, 2010).

Within broader approaches to developing competitive cultivars, those combining robust genetic

traits with marketable naming strategies, grapevine breeding provides a particularly illustrative domain (Eibach et al., 2013, pp. 241-245; Becker, 2013, pp. 4-7). The leading institutions in the selection of disease-resistant cultivars in Germany are located in Freiburg and Geisenheim, although important contributions also come from breeding programs in Würzburg, Trier, and the Julius Kühn Institute (Jörger, 2012, pp. 16-19). The cultivars produced by these institutions have gained international recognition for their resistance to fungal diseases and for the complexity of wines produced from their fruit, but not without caveats (Becker, 2013, p. 4).

A distinctive characteristic of these German-bred cultivars is the tendency to employ lexemes of French origin when forming their names, as seen in *Souvignier Gris*, *Cabernet Carbon*, *Cabernet Cortis*, *Calardis Blanc*, *Solaris*, and *Muscaris* (Jörger, 2012, pp. 16-19). The pronunciation patterns of some of these names closely follow French phonetic traditions, for instance, the nasal vowel [ã] in *Blanc*, the uvular rhotic [ʁ] characteristic of French *r* (Paradis & Prunet, 2000). This naming practice can be linked to two principal factors. First, many of these cultivars carry partial genetic inheritance from globally renowned French wine grapes such as *Cabernet Sauvignon*, *Merlot*, *Pinot Noir*, and *Chardonnay*. Through naming, breeders sought to emphasise this prestigious lineage, thereby highlighting the improved qualities of the new, more resilient varieties. It should be noted, however, that resistant German breeding lines, referred to in German as *Pilzwidestandsfähig*—commonly abbreviated PIWI—, meaning fungus-resistant, are not pure representatives of the traditional European wine grape—*Vitis vinifera*—(Eibach et al., pp. 241-245). Their genetic makeup includes Asian and American contributions that provide enhanced resilience under adverse environmental conditions (Eibach et al., pp. 241-245; Jörger, 2012, pp. 16-19). They represent a deliberate combination of genes associated with high wine quality and those conferring strong resistance against fungal pathogens. Nevertheless, despite their mixed origin, PIWI cultivars have been officially registered within the European Union as *Vitis Vinifera* and are permitted for cultivation and wine production in many countries (Deutsches Weininstitut, n.d.).

The second core factor shaping their naming is the intentional imitation of French phonetic and morphological norms as a means of capturing global markets. Such strategies capitalise on the entrenched expectations, or, to some extent, the biases and cultural clichés, of consumers who associate superior wine quality or technical grape varieties with France (Becker, 2013). Thus, the naming of PIWI cultivars functions not only as an informative linguistic choice but also as a powerful marketing device embedded within a long-standing symbolic economy of wine culture.

The analysed naming strategy of foregrounding the desired implications is clearly visible in the grape variety name *Cabernet Cortis*, a cultivar bred at the Freiburg Research Institute. The first part of the name, *Cabernet*, aims at establishing a direct connection with the globally renowned and respected *Cabernet Sauvignon*, which presupposes a high-quality *vinifera* lineage, even though it has a small portion of non-*vinifera* genetic material (Eibach et al., 2013; Jörger, 2012). The second part, *Cortis*, aligns with Romance morphological and phonetic norms, creating the variety name that follows French cultivar nomenclature patterns. Speaking in onomasiological terms, the name features a double motivation: prestige-based association with globally famous classical French wines and grape vine cultivars is the first motivation behind naming, and marketing-based *phonetic imitation* targeted at consumer familiarity and established expectations of modern world wine culture. Thus, *Cabernet Cortis* is a vivid example of how linguistic choices in German PIWI naming incorporate simultaneously technological innovations and cultural legitimisation (Deutsches Weininstitut n.d.). The same pattern follows such varieties as: *Souvignier Gris*,

Cabernet Carol, *Calardis Blanc*, etc, but in some other cultivar names different strategies could be traced.

A slightly distinct onomasiological perspective could be perceived in the grape variety name *Solaris*, which employs symbolic-semantic motivation relying on lexemes ascribed to Latin incorporating strong positive cultural associations (Štekauer, 1998). The name consists of two Latin lexemes, the first part being *sol*—meaning *The Sun*—, and the suffix *-aris*, which could be seen as an adjective-forming part. The approximate translation of the name might be *of the Sun* expressed the idea that word-formation is driven by an onomasiological process which is based upon using a lexical unit that expresses a desirable conceptual feature via generally accepted cultural symbols. *The Sun* is an extremely relevant concept that is central to the cultivation of grapes. It presupposes *warmth*, *favourable growing conditions*, *ripeness* and *sugar accumulation*. Having chosen the Latin origin name for naming their new variety, the breeders at Freiburg highlighted the distinctive qualities of the cultivar, and, what could be even more relevant, the appearance of its bunches, featuring the light-yellow skin with slight translucency of the berries (Vitis International Variety Catalogue, n.d.). A closely related grape variety *Muscaris*, follows a similar pattern, but the emphasis is on its flavour that resembles that of *Muscat*; and the *Regent* grape variety could be ascribed to different paths of naming, due to the etymology of the lexeme used in its creation (Vitis International Variety Catalogue, n.d.).

It should be clearly stated, however, that not all German PIWI varieties strive to implement foreign influences; such cultivar names as *Johanniter*, *Bronner*, *Donauriesling*, *Blütenmuskateller*, *Goldmuskateller*, and *Roesle* use German or typical for German-speaking regions lexemes, highlighting the continuity of the winemaking tradition and noble lineage of the grapes (Austria authorises, 2018; Vitis International Variety Catalogue, n.d.).

In the English-speaking countries, which mostly belong to the New World style of wine production, as the UK has not been associated with a robust wine production, the varied naming strategies are also implemented, but this process is observed in marketing and popularisation of old, well-established varieties. A prominent example of this, according to South Africa Online (2025), is the traditional Italian grape variety, known in the US, especially Californian under the name of Zinfandel (or shortened to *Zin*), in Italy however, it bears a different name, *Primitivo*, but the cultivar is said to be recognised under a range of approximately 30 names, Croatian variant *Crljenak kaštelanski* being one of them. Croatia is also the country of origin of this grape.

The difference in cultivar names in several countries signifies not only the linguistic variations across the globe, or cultural differences, it often refers to the preferred or established proper names, but even more frequent is the distinction of the wines produced from the same grape, due to the climatic conditions, or, what is usually more important, the traditional vinification in the considered areas. Although the Zinfandel's berries are of dark blue colour, making white wine from this variety in California is a common practice, which was adopted in the Blaauwklippen winery in South Africa (South Africa Online, 2025).

Zinfandel is no exception when it comes to using different names for the same variety. One of the world's Great varieties is French-bred *Syrah*, which, depending on the place of cultivation and the style of wine produced, can be referred to either as *Syrah* or *Shiraz*; the former usually referring to the French or French-style cooler climate wine, and the latter to the Australian or New World warmer climate wine and vineyards. This peculiarity of the wine naming creation is extremely interesting from the linguistic perspective in general and from the onomasiological perspective in

particular, as different grape cultivation or wine production methods, as well as vineyard locations, are often distinguished using different names for the wine created from the same variety of grapes, Syrah (Mowery, 2024). Further and much bolder considerations concerning sensory studies could be stated and researched in this respect. The question of whether the connection between different variants of naming and the taste associations of people familiar with the distinctions of the wine styles exists. Because, in contrast to the previous assumption, the connection between the name of the grape or wine style and the range of descriptive epithets is clear, and is common practice; for example, sommeliers use words like *floral*, *smoke*, *herbal*, *leather*, etc to describe the complexity of the Syrahs or Shirazes (Mowery, 2024). The matter under consideration could be expanded and result in subsequent research on references to sensory studies of wine tasting.

CORPUS EVIDENCE FROM GLOBAL ENGLISH

To complement the qualitative analysis, a corpus-based investigation was conducted using the Global Web-Based English —GloWbE— corpus (Davies, 2013). The corpus comprises approximately 1.9 billion words collected from twenty English-speaking countries and is particularly suitable for examining regional variation in lexical usage. Exact-phrase searches were carried out in December 2025, and frequency values were normalised per million words to facilitate comparison among regional subcorpora.

The corpus analysis pursued two objectives. First, it examined the geographical distribution of selected fruit and grape cultivar names across regional varieties of English. Second, it analysed the evaluative adjectives most frequently associated with Golden Delicious in authentic language use. The corpus findings are intended to complement, rather than replace, the qualitative onomasiological interpretation presented in the preceding sections.

The first part of the analysis examines the occurrence frequency of apple cultivar names across different national varieties of English (Table 1).

Table 1

The occurrence frequency of Golden Delicious, Idared, Honeycrisp, and Red Delicious (Davies, 2013).

Cultivar	US	GB	CA	AU	NZ	IE	All
Golden Delicious	18	15	16	3	9	5	81
Idared	3	-	2	-	-	1	10
Honeycrisp	7	1	12	3	-	-	24
Red Delicious	18	5	1	3	8	1	54

The results indicate that Golden Delicious displays the highest overall frequency across nearly all regional varieties of English. Red Delicious shows particularly high frequencies in the United States and New Zealand, while being comparatively rare in other regions, with limited presence in British English. Honeycrisp is most strongly associated with North American varieties of English, especially those of the United States and Canada, whereas Idared appears to be almost exclusively confined to North American usage. These distributional patterns reflect both the geographical origins of the cultivars and their commercial prominence in specific markets (Davies, 2013).

The second part of the corpus analysis addresses grape varieties that exist under multiple names and exhibit regionally conditioned usage preferences (Table 2).

Table 2

The occurrence frequency of Zinfandel, Primitivo, Shiraz, and Syrah (Davies 2013).

Variety	US	GB	CA	AU	NZ	IE	All
Zinfandel	63	27	19	5	5	25	218
Primitivo	9	16	2	2	-	57	133
Shiraz	112	190	74	310	85	40	1463
Syrah	126	92	50	21	134	40	611

The data clearly show that Zinfandel occurs with significantly higher frequency in American English, while Primitivo is more characteristic of European contexts. A similar tendency can be observed for Shiraz, which is extremely popular in Australia and New Zealand. In contrast to Australia, where the alternative name Syrah occurs less frequently, New Zealand uses Syrah even more often than Shiraz. This difference can be attributed to the fact that both stylistic variants of wine produced from the same grape variety coexist in New Zealand, owing to the country's climatic conditions, which allow for both warmer- and cooler-climate expressions. In this context, Shiraz typically denotes the warmer-climate style, whereas Syrah refers to the cooler-climate variant. Other regions employ both names depending on the origin of the imported wine and the stylistic traditions of wine production (Davies, 2013).

The third component of the corpus-based analysis focuses on the adjectives most frequently occurring with Golden Delicious (Table 3).

The adjectives listed in the data table retrieved from GloWbE display mostly positive characteristics and support the claim that descriptions accompanying variety names are intended to highlight the advantages of the fruit produced by the cultivars, however, a small number of context-dependent or negative modifiers occur. In this case, the most frequent adjectives relate to colour, reflecting the description of various phenomena associated with cultivation and the visual appearance of the fruit. In addition, a range of adjectives referring to fruit quality can be observed, including *sweet, sunny, royal, ripe, popular, crisp, nice, large, fragrant, and finest* (Davies, 2013). All corpus queries were conducted in December 2025 using exact-phrase searches. Frequencies were normalized per million words to ensure comparability across regional subcorpora.

Table 3

The adjectives that are most frequently used with Golden Delicious (Davies, 2013).

Adjective	Frequency
RED	6
DKNY	4
ORANGE	3
YELLOW	1
SWEET	1
SUNNY	1
SIMILAR	1
RUSSET-RESISTANT	1
ROYAL	1
RIPE	1
POPULAR	1
CRISP	1
NICE	1
MODERN	1
MEDIUM	1
MEALY	1
LARGE	1
INFAMOUS	1
FRAGRANT	1
FINEST	1
FILTHY	1

CONCLUSION

The present study demonstrates that naming strategies in fruit and berry cultivation constitute a linguistically motivated and culturally embedded process shaped by sensory experience, symbolic associations, historical references, and commercial considerations. The analysed apple and grape cultivar names reveal that lexical nomination extends well beyond simple identification, functioning simultaneously as a means of communicating quality, evoking cultural values, and influencing consumer perception.

From an onomasiological perspective, the findings show that cultivar names are motivated by the deliberate selection of salient conceptual features. English apple cultivars predominantly employ descriptive epithets emphasising taste, colour, texture, and other sensory characteristics, whereas German naming practices demonstrate a broader use of historical, prestige-oriented, and culturally symbolic motivations. In the case of German PIWI grape cultivars, French- and Latin- derived lexical elements frequently serve to evoke continuity with established European wine traditions while simultaneously promoting innovative disease-resistant varieties. These observations illustrate that horticultural and viticultural nomenclature represents an interaction between linguistic creativity, cultural symbolism, and market-oriented communication.

The corpus-based analysis complements the qualitative interpretation by demonstrating systematic regional variation in the use of selected cultivar names throughout the English-speaking world. The predominance of positive evaluative adjectives accompanying commercially successful cultivars further supports the argument that naming practices contribute to the construction of favourable consumer expectations and reinforce the marketing function of cultivar nomenclature.

The study has several limitations. The qualitative analysis is based on a deliberately selected sample of commercially significant fruit and grape cultivars rather than an exhaustive inventory of horticultural nomenclature. Furthermore, although the qualitative discussion incorporates both English and German naming practices, the corpus analysis is limited to English-language data provided by the GloWbE corpus. Consequently, the findings should be interpreted as representative of the analysed material rather than universally applicable to all horticultural traditions or languages.

Despite these limitations, the study offers practical implications for several fields. The findings contribute to research in onomastics, specialised terminology, ethnolinguistics, and agricultural communication by demonstrating how cultivar names function as linguistic, cultural, and commercial resources simultaneously. The results may also be relevant for plant breeders, horticultural organisations, and agricultural marketers seeking to develop cultivar names that effectively communicate desirable sensory qualities, cultural associations, and product identity across different linguistic and cultural contexts.

Future research may extend the present approach by incorporating larger multilingual corpora, additional horticultural species, and experimental investigations of consumer perception. Comparative studies involving other European languages, as well as psycholinguistic and sensory research, may further clarify how cultivar names influence expectations, product evaluation, and purchasing behaviour across different cultural communities.

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Disabled Individuals in Disasters and the Roles of Social Work in the light of *Americans with Disabilities Act*

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abstract

Disasters do not affect all individuals in society equally; disabled individuals are disproportionately exposed to disaster risks due to persistent accessibility barriers, the disruption of support networks, evacuation challenges, and constrained access to essential services. Incorporating the specific challenges faced by disabled individuals—spanning pre-disaster preparedness, emergency response, and post-disaster recovery—is paramount for developing inclusive and rights-based disaster management frameworks. This review study aims to evaluate the primary difficulties encountered by disabled individuals during disasters, identify the core components of disability-sensitive disaster management, and delineate the roles and functions of the social work profession within this context. The study explores the multifaceted inequalities disabled individuals experience, such as barriers to information and preparedness pre-disaster; complications in evacuation, communication, and safety during a disaster; and limited access to shelter, rehabilitation, psychosocial support, and social services post-disaster. Furthermore, it emphasizes the imperative of ensuring the active participation of disabled individuals as key stakeholders in disaster management planning and decision-making mechanisms. Within this framework, it is demonstrated that the social work profession significantly contributes to the empowerment of disabled individuals through its diverse functions, including counseling, resource management, advocacy, education, coordination, and policy planning. In conclusion, developing disability-sensitive, accessible, and rights-based disaster management practices is essential for enhancing the resilience of disabled individuals and mitigating systemic social inequalities in the face of disasters.

Keywords: *disaster, disabled individuals, disability-sensitive disaster management, social work, social vulnerability.*

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1. INTRODUCTION

Disasters are not merely exogenous shocks; they are critical junctures that interrupt the continuity of social life and exacerbate existing systemic inequalities. Within this context, disabled individuals often experience the impacts of disasters disproportionately, largely due to systemic barriers in accessibility, communication, mobility, and the continuity of essential care services. Consequently, disaster risk management must extend beyond physical safety protocols to address independent living, equitable access to services, and the preservation of human dignity for all citizens.

The efficacy of disaster management—ranging from pre-disaster preparedness and real-time evacuation strategies to post-disaster rehabilitation and psychosocial support—directly determines the safety and well-being of disabled populations. An inclusive disaster management framework, therefore, requires the systematic integration of the diverse needs of disabled individuals at all stages of the disaster cycle, ensuring their active participation rather than mere passive inclusion.

This study evaluates the specific challenges faced by disabled individuals during disasters, explores the foundational principles of disability-sensitive disaster management, and delineates the strategic roles of the social work profession in this field. By framing these issues within the context of the *Americans with Disabilities Act (ADA)*, the study first critiques the barriers encountered by disabled individuals, then examines disability-sensitive disaster management approaches, and finally discusses the contributions of social work through its core functions of counseling, resource management, and education.

Despite the global commitment to inclusive disaster risk reduction as enshrined in the *Sendai Framework (2015–2030)*, there remains a persistent gap between rights-based rhetoric and field-level implementation. This study argues that the persistent exclusion of disabled individuals from disaster planning is not merely a logistical failure, but an ontological one, stemming from traditional disaster management paradigms that prioritize standardized, non-disabled bodies. By analyzing the intersection of the *Americans with Disabilities Act (ADA)* and contemporary social work practice, this article shifts the discourse from a *vulnerability-centric* model—which views disabled people as passive subjects of care—to an *agency-centric* framework. In this light, the social work profession emerges not only as a service provider but as a critical agent of structural change, capable of bridging the disconnect between institutional policy and the lived realities of individuals with functional needs.

2. DISABLED INDIVIDUALS AS A VULNERABLE GROUP IN DISASTERS

2.1. The Conceptual Foundations of Disability and Disaster

The phenomenon of disability has been defined through various approaches throughout history. Given its complex and multidimensional nature, there is no single, fixed definition of disability. Historically addressed through an individual and medical lens, disability is now increasingly evaluated in terms of its social dimensions. According to Tunç Tekindal (2014, p. 242), disability is a condition arising not from an individual's inadequacy, but from social, cultural, economic, and environmental factors that restrict participation in social life. This rights-based understanding, which frames disability as a matter of equal participation rather than individual deficit, is reflected

in landmark anti-discrimination legislation such as the *Americans with Disabilities Act* (ADA) of 1990, which guarantees equal access to public services and programs. Approximately 15% of the world's population lives with at least one disability (WHO, 2011, p. 44).

Distinguishing between impairment and disability is essential for conceptual clarity. In a 1980 declaration, the World Health Organization categorized disability into three distinct domains: impairment, disability (incapacity), and handicap. Accordingly, impairment refers to losses or abnormalities in physical, psychological, or anatomical structures; disability denotes a reduction in an individual's activity and performance; and handicap describes a situation where, as a consequence of impairment and disability, the individual cannot fulfill life requirements expected by society relative to age, gender, and socio-cultural characteristics (Ünal, 2017, p. 48). Further classifications exist; for instance, the *2002 Türkiye Disability Survey*, conducted by the State Institute of Statistics and the Administration for Disabled People, categorizes disability as intellectual, orthopedic, chronic, language and speech, visual, and hearing-related (Başbakanlık Özürlüler İdaresi Başkanlığı, 2002, p. 10). Moreover, the WHO's International Classification of Functioning, Disability and Health (ICF) framework addresses disability through a holistic lens, encompassing domains such as communication, self-care, daily life activities, and participation in civic life (WHO, 2001).

Disaster, as a recurring phenomenon that profoundly impacts human existence, similarly lacks a singular, universally accepted definition due to its multifaceted nature. The United Nations Office for Disaster Risk Reduction (UNDRR, 2022) defines a disaster as “a serious disruption of the functioning of a community or a society at any scale due to hazardous events interacting with conditions of exposure, vulnerability and capacity, leading to one or more of human, material, economic and environmental losses and impacts.” Complementarily, the Turkish Language Association (2022) defines it as “destruction caused by various natural events” [author's translation] (Türk Dil Kurumu, 2022). AFAD (2022) extends this by characterizing disasters as natural, human-induced, or technological events that generate physical, economic, and social losses, thereby interrupting the normal flow of life and overwhelming societal coping capacities. Central to these definitions are the disruption of ecological balance, the breakdown of social order, and the insufficiency of adaptive capacity (Demiröz Yıldırım, 2022, p. 6). Traditionally classified as rapid or slow onset, and natural or human-induced (UNDRR, 2022), the magnitude of these events is predominantly measured by socio-economic losses, structural damage, and mortality rates (Ünal, 2017, p. 11).

2.2. Difficulties Faced by Disabled Individuals in Disasters

Disasters do not affect every individual or society to the same degree; rather, they disproportionately impact disadvantaged, vulnerable, and fragile groups—including the impoverished, children, women, the elderly, individuals with disabilities, the unemployed, migrants, and refugees (Kahraman & Kahraman, 2017). Due to their disadvantaged position regarding self-sufficiency, these groups encounter significantly more adverse circumstances throughout the disaster cycle (Demir, 2021, p. 27; Aslan, 2021, p. 16; Alexander, 2008, p. 385). Pre-existing disability conditions and the consequent need for support often impede adequate access to essential resources (Ton et al., 2019, p. 12). Furthermore, as the nature of disability is diverse, the challenges and needs experienced are highly individualized. Because individuals with disabilities may face limitations

in mobility, cognition, perception, or communication, they are often at heightened risk of injury, illness, or social exclusion (Alexander, 2008, p. 385). Regardless of whether their disability is physical, intellectual, or sensory, these individuals are affected in both the short and long term, particularly when stigmatization, social exclusion, and discrimination exacerbate their precarious situation (King et al., 2019, p. 460). Indeed, during crises, the absence of accessibility and systemic discrimination often outweigh the challenges posed by physical or mental impairments themselves. Moreover, disasters can be catalysts for disability; statistics indicate that the mortality rate for disabled individuals in disasters is four times higher than that of their non-disabled counterparts, and approximately 6% of those affected may acquire a disability as a direct result of the event (UNESCAP, 2017; Ton et al., 2019, p. 12). Recent needs assessments conducted by the United Nations Development Programme (UNDP, 2024) following the earthquakes in Turkey corroborate these findings, highlighting critical gaps in prosthetic-orthotic and rehabilitation services, accessibility deficiencies in temporary shelters, inadequate psychosocial support, and diminished employment prospects.

The challenges experienced before a disaster are deeply rooted in gaps in preparedness. Social inequality, poverty, stigmatization, and the lack of reliable, disability-disaggregated data are primary factors that heighten vulnerability (Gartrell et al., 2020). Effective preparedness requires access to accurate information regarding the disabled population, their specific disability types, and their unique support needs (Villeneuve et al., 2021). Providing meaningful assistance necessitates more than generic procedures; it demands specialized, tailored planning (Alexander, 2012). It is vital that individuals with disabilities are empowered to engage in their own preparedness, understanding how to navigate emergencies—such as moving through debris or securing life-sustaining support—to ensure their survival (Alexander, 2008, p. 385).

During the acute phase of a disaster, vulnerability is often compounded by the interruption of established support networks, difficulties in evacuation, and challenges in expressing urgent needs. Research indicates that evacuation routes frequently lack accessibility, and rescue calls may go unheeded if communication methods are not inclusive (Alexander, 2008, p. 384; Stough et al., 2017, p. 474). When physical, mental, and social support systems collapse, the risk to life becomes critical. Thus, disaster preparedness plans must be explicitly oriented toward these unique requirements to maintain the safety of disabled individuals.

In the post-disaster recovery period, the problems faced by disabled individuals remain multifaceted. These include the risk of acquiring new disabilities, restricted access to basic needs, discriminatory attitudes in aid distribution, and the destruction of accessible spaces (King et al., 2019, p. 460). Hurricane Katrina serves as a poignant, frequently cited example of these systemic failures. The National Council on Disability (2006) documented that disabled individuals were disproportionately affected because their needs were overlooked at every stage of the response. Many were unable to evacuate due to inaccessible transportation—such as vehicles lacking wheelchair lifts—while safety-critical information was not provided in accessible formats for the blind or deaf. Furthermore, residents of nursing homes were often abandoned during evacuations, and these inequalities persisted into the recovery phase as accessible temporary housing remained unavailable (National Council on Disability, 2006).

Beyond the immediate loss of life and property, disasters may lead to new disability cases due to structural collapses (Rahmat & Pernanda, 2020, p. 138). The disruption of environmental and institutional support networks can also lead to widespread victimization (Brilleman et al., 2017, p. 119). Furthermore, disabled individuals remain highly vulnerable to assault or sexual violence in the aftermath of disasters (King et al., 2019, p. 460). Intersectional identities further compound these risks; for instance, disabled women and girls face a higher likelihood of physical and sexual exploitation compared to their non-disabled peers (Smith et al., 2012). Similarly, disabled children constitute a unique risk group in terms of social vulnerability (Peek & Stough, 2010). Given these complex challenges, it is imperative to identify specific post-disaster needs and establish a framework for disability-sensitive disaster management.

3. DISABILITY-SENSITIVE DISASTER MANAGEMENT

Disaster management, as defined by *AFAD* (2022), encompasses the systematic processes of planning, directing, coordinating, and implementing measures to prevent disasters or mitigate their impact throughout the entire disaster cycle. Integrated disaster management is conventionally structured into four stages: risk and harm reduction, preparedness, response, and recovery (Demiröz Yıldırım, 2022). Disability-sensitive disaster management must be aligned with these stages, integrating risk mitigation and support development during the pre-disaster phase; medical and psychological first aid during the acute period; and comprehensive rehabilitation and psychosocial support in the recovery phase (Türk, 2022). Explicitly accounting for disability groups—including those with physical, intellectual, visual, or hearing impairments—is critical for accurate needs analysis, comprehensive planning, and effective response strategies (Yılmaz et al., 2019).

The inclusion of disabled individuals in decision-making mechanisms is fundamental to realizing disability-sensitive management. Supporting their integration into all disaster processes is essential for reducing their specific vulnerabilities (Aslan, 2021, p. 17). Conversely, their exclusion—often stemming from societal perceptions that they are the “least worthy” of being rescued—remains a significant barrier (Abbot & Porter, 2013, p. 843). This systemic exclusion manifests in various inequalities, including the lack of disability-inclusive planning, limited access to resources, and the failure to account for functional needs in shelters and infrastructure (Smith et al., 2012).

Disability-sensitive disaster management requires a shift toward planning that is universally inclusive while simultaneously addressing unique functional needs. Drawing upon the criteria established by Alexander et al. (2012, p. 421), disability-sensitive assistance should ensure that procedures and services are equally accessible during crises; that emergency communications are reliable and provided in accessible formats; and that disabled individuals are actively consulted throughout the preparedness process. Furthermore, it is imperative to provide tailored training for emergency response teams and to ensure that media outlets providing safety information are inclusive (Alexander et al., 2012, p. 421). Similarly, Aslan (2021, pp. 19–20) underscores the importance of integrating disabled individuals into planning processes, establishing accessible shelters, creating inclusive communication channels, and developing detailed risk maps that account for disability-specific requirements. While support delivery must be adapted to specific functional needs, the fundamental requirements—such as shelter, water, sanitation, and food—remain universal (Alexander et al., 2012).

The United States offers a pertinent institutional model for this shift. Following the systemic failures exposed by *Hurricane Katrina*, FEMA appointed a disability coordinator and established the *Office of Disability Integration and Coordination* in 2010 to weave disability needs into all phases of emergency management (FEMA, 2025). This approach moves away from rigid diagnostic categories toward the concept of “access and functional needs,” addressing communication, health maintenance, independence, and transportation. By deploying disability integration specialists to field-level decision-making processes, this model moves beyond treating disabled people as passive aid recipients, integrating them instead as active stakeholders (FEMA, 2025).

At the international level, the *Sendai Framework for Disaster Risk Reduction (2015–2030)* serves as a landmark document. It explicitly emphasizes the empowerment of vulnerable groups and the necessity of disability-sensitive management for building resilience (UNDRR, 2015). By identifying disabled individuals and their representative organizations as key stakeholders rather than mere fragile groups needing protection, the *Sendai Framework* positions them as active agents in risk reduction (Stough & Kang, 2015; Pertiwi et al., 2019). Despite these policy advancements, global progress remains slow; studies across eight countries suggest that rights-based approaches are frequently unimplemented, and essential disability-disaggregated data systems are often absent (DiDRRN, 2022). The *Midterm Review of the Sendai Framework*, published in 2023, further confirms that inclusive participation remains insufficient (UNDRR, 2023). This disconnect between policy and practice highlights the critical role of social work, a human rights-based discipline, in advocating for more inclusive and disability-sensitive disaster management strategies.

4. DISABLED INDIVIDUALS IN DISASTERS AND SOCIAL WORK

Social work is an academic discipline and profession that promotes social change and development, social cohesion, and the empowerment and liberation of people on the basis of human rights, social justice, respect for diversities, and shared responsibility (IFSW, 2022). Social work serves disadvantaged groups that are prevented from integrating with society. Disabled individuals experience problems in accessing basic services in areas such as education, health, employment, and accessibility (Tellioglu, 2019). In this context, disabled individuals fall within the focus of interest of the social work profession. At the same time, natural and human-made disasters affect the access of disabled individuals to basic services, their needs, their safety, their disability conditions, and their welfare. Thus, social work intervention concerning disabled individuals in disasters comes onto the agenda. The social work profession plays a role at the micro, mezzo, and macro levels in the stages of disaster management (Javadian, 2007). At this point, social work has various functions in disasters. These are (Yueh-Ching, 2003):

1. Supporting individuals and families: providing emotional support, grief counseling, and post-disaster support for the post-traumatic stress disorder of vulnerable groups such as disabled individuals, children, and older people; motivating disaster victims to participate in activities; providing emotional support to families in shelter areas; establishing connections to help families arrange funeral ceremonies, conducting home visits, and holding interviews with the families of the deceased regarding the grieving process.

2. Relating individual needs to resources and helping people access resources: facilitating contact between local government and volunteer groups; relating social services to the needs of individuals; identifying vulnerable people; relating family needs to resources and providing them; procuring, distributing, and delivering basic-need supplies; identifying and reporting the needs of disaster victims to convey them to the central government.

3. Preventing serious physical and mental problems: carrying out therapeutic interventions for survivors, including various types of counseling—for example, grief counseling, post-relief counseling, and so on.

4. Preventing the disintegration of individuals, families, groups, organizations, and communities: providing shelter, information, and support to homeless individuals and families; reducing survivors' indifference to life and their feelings of powerlessness and hopelessness; effectively coordinating and organizing the feedback given to groups, organizations, and communities.

5. Intervening to change micro and macro systems in order to improve client welfare: ensuring advocacy for change in government programs; developing volunteer services; conducting needs assessments; improving service programs; providing distribution centers for disaster victims; changing welfare policies and recovery programs to improve a community's ability to meet human needs; contributing to the development of system capacities aimed at improving the infrastructural conditions of disaster victims.

In the process of carrying out these disaster-related practices of the social work profession and discipline, as Miley et al. (1998) state, social work practice is conducted within the framework of three interrelated functions: counseling, resource management, and education. At this stage, social work uses, for both client systems and practitioners, the roles of enabler, facilitator, planner, and colleague/monitor within the counseling function; the roles of broker/advocate, convener/mediator, mobilizer, and activist within the resource management function; and the roles of teacher, trainer, community informer, and researcher/scholar within the education function (Sheafor & Horejsi, 2014; Miley et al., 1998). Within the framework of the counseling, resource management, and education functions, the following roles are proposed for social workers concerning disabled individuals in disasters (Artan & Özkan, 2020; Dominelli, 2015; Ceyhan, 2023).

4.1. Counseling Function

At the micro level, while working with individuals and their families, social workers assume the role of empowering disabled individuals and their families in finding solutions to the pre-disaster preparedness process, the needs at the moment of the disaster, and the problems they experience in their own lives after the disaster (Artan & Özkan, 2020). In disasters, social workers apply evidence-based assessments and carry out interventions to help individuals, families, or small groups cope with the social and emotional problems in their lives (Harms et al., 2020). They perform the functions of psychosocial assessment and diagnosis, care aimed at maintaining balance, social treatment, and evaluation of practice (Sheafor & Horejsi, 2014; Miley et al., 1998).

At the mezzo level, while working with formal groups and organizations, the social worker assumes a facilitator role by supporting organizational development in conducting the disaster

management process for disabled individuals and developing appropriate interventions (Zakour, 1996; Sheafor & Horejsi, 2014).

At the macro level, while working with the community and society, the social worker assumes a planner role through conducting research and planning and coordinating program and policy development in order to develop disaster management for disabled individuals (Dominelli, 2015; Artan & Özkan, 2020). As an agent of social change, the social worker performs the functions of analyzing social problems and policies, mobilizing the community's interest, and ensuring the development of social resources (Sheafor & Horejsi, 2014).

Within the social work system, the social worker assumes the colleague/monitor role by developing cooperation with colleagues, providing guidance, and supporting colleagues regarding the dissemination of professional culture in the field of social work in disasters (Cronin, Ryan, & Brier, 2007). As a supervisor, the social worker performs the functions of staff orientation and training, personnel management, supervision, and consultation (Miley et al., 1998).

4.2. Resource Management Function

At the micro level, social workers assume the broker/advocate role by enabling disabled individuals and their families to connect with the resources they need through case management (Drolet et al., 2021). As a broker, the social worker performs the functions of assessing the situation and resources of the disabled individual and their family, making referrals, establishing connections among service delivery systems, and providing information (Sheafor & Horejsi, 2014). Through advocacy methods, social workers must strike a balance between the client's participation in the change process and the maximization of their right to self-determination. Within the scope of advocacy, social workers carry out advocacy in order to increase the opportunities of disabled individuals and ensure their access to basic services in disaster management processes (Dominelli, 2015). What is essential is to help clients become their own advocates. As a case manager, the social worker's task typically begins with understanding the type of service needed and continues with investigating the obstacles to a successful life, advocating for clients while trying to reach potential aid, and sometimes providing some services directly to the client. As a case manager, the social worker performs the functions of identifying and directing the client, assessing the client, service/treatment planning, linkage and coordination of services, follow-up and monitoring of service delivery, and supporting the client (Miley et al., 1998).

At the mezzo level, while working with formal groups and organizations, the social worker assumes the convener/mediator role by establishing a relationship network among groups and organizations in order to develop disability-sensitive disaster management and to develop resources in line with needs (Zakour & Harrell, 2003). Social workers must have knowledge about the various programs and services available for disabled individuals in disaster management, keep their assessments of an individual's strengths and limitations up to date according to various disability groups, and understand the procedure for accessing resources. Social workers must provide clients with the services they need in a timely and planned manner and respond to the demands of the social institutions that employ them. In other words, they must balance their responsibilities toward the institution and toward the client. The social worker is responsible for maximizing the service provided even in inadequate settings. As a workload manager, the

social worker performs the functions of preparing a work plan, time management, monitoring the maintenance of quality, and information processing (Sheafor & Horejsi, 2014).

At the macro level, while working with the community and society, the social worker assumes the activist role by initiating and sustaining change through social action in order to ensure that disability is taken into account in disaster management before, during, and after a disaster and that resources are used in line with needs (Dominelli, 2015). The social worker assumes the responsibility of implementing institutional policies and management programs. In the manager role, the social worker is responsible for the execution of policies, programs, and laws made by others. As a manager, the social worker performs the functions of administration, intra- and inter-institutional coordination, policy and program development, and program evaluation (Sheafor and Horejsi, 2014). Within the social work system, in social work intervention oriented toward disabled individuals in disasters, the social worker assumes the activist (mobilizer) role by stimulating community services through interdisciplinary activities (Artan & Özkan, 2020).

4.3. Education Function

At the micro level, while working with disabled individuals and their families, social workers assume the teacher role in order to facilitate the information-processing process and to provide educational programs before, during, and after a disaster (Artan & Özkan, 2020). Social workers carry out the act of educating disabled individuals and their families to cope with the difficult situations brought about by disasters or to anticipate and prevent problems and crises in advance. The teaching role, as it is completed as a social work service, includes teaching clients how to adapt to issues that affect them negatively, giving understandable advice, and explaining possibilities and likely outcomes to them so that they can make decisions with information about the problems in their lives (Miley et al., 1998). As an educator, the social worker performs the functions of teaching social and daily life skills in disasters, facilitating behavioral change, and basic protection (Sheafor & Horejsi, 2014).

At the mezzo level, while working with formal groups and organizations, the social worker assumes the training role in order to ensure the development of disability-sensitive preparedness, planning, analysis, and response by developing and directing field personnel in the disaster management process (Dominelli, 2015; Sheafor & Horejsi, 2014).

At the macro level, while working with the community and society, the social worker assumes the community-informer role by informing the public about disability in disasters, the needs of disabled individuals, the provision of appropriate resources, and social services (Ceyhan, 2023; Pyles, 2007; Artan & Özkan, 2020).

Within the social work system, the social worker assumes the researcher/scholar role by both conducting research and informing colleagues in order to generate knowledge in the field of disability and social work in disasters (Harms et al., 2020; Zakour, 1996; Ceyhan, 2023). In today's rapidly changing world, the social worker has to develop, on a regular basis, the knowledge, values, and skills that guide their practice; uses new knowledge that develops in relation to the relevant disciplines; and strives to develop knowledge that transforms the social work profession. As a professional, the social worker performs the functions of self-evaluation,

personal/professional development, and the strengthening of the social work profession (Sheafor & Horejsi, 2014; Miley et al., 1998).

5. CONCLUSION AND RECOMMENDATIONS

Disabled individuals, representing one of the demographics most severely impacted by disasters, face profound challenges throughout the disaster cycle—pre-disaster, acute, and recovery phases. These difficulties are often compounded by pre-existing conditions, systemic social exclusion, stigmatization, discrimination, and a pervasive lack of accessibility. Consequently, the mortality rate for disabled individuals during disasters is estimated to be four times higher than that of their non-disabled counterparts. While traditional disaster management often employs universal planning, such an approach frequently fails to address the specific functional needs of disabled populations. The systemic inequalities observed in disaster contexts are intrinsically linked to the marginalization of disabled individuals within disaster management frameworks, rendering current response mechanisms insufficient. Thus, it is imperative to shift toward *disability-sensitive disaster management* that ensures the meaningful participation of disabled individuals not merely as beneficiaries, but as key stakeholders and active agents of change.

Given that natural and human-made disasters significantly disrupt access to basic services, safety, and overall welfare, the role of the social work profession becomes critical. Social workers, operating through the integrated functions of counseling, resource management, and education, provide a multifaceted intervention strategy—spanning micro, mezzo, and macro levels—to support this demographic. Based on the synthesis of the study’s findings, the following comprehensive recommendations are proposed to enhance disaster management and social work practices:

To foster *inclusive disaster management*, it is essential to move beyond generic, top-down planning and systematically integrate the specific functional needs of disabled individuals into all phases of disaster implementation. This requires a fundamental paradigm shift from viewing disabled individuals as passive recipients of aid to recognizing them as active agents, ensuring their *meaningful participation* and representation in decision-making and policy development. Furthermore, the *institutionalization of social work* within disaster frameworks must be prioritized; by leveraging micro, mezzo, and macro interventions—including counseling, resource management, and educational advocacy—social workers can bridge critical gaps in service delivery and ensure equitable access to support during and after crises.

Beyond institutional reform, there is an urgent need for the development of *disability-disaggregated data systems* to inform evidence-based disaster planning. Without precise data regarding the distribution, type, and support needs of disabled populations, inclusive strategies cannot be accurately executed. Moreover, educational programs must be expanded to prepare both the public and disaster response personnel on how to interact with and support individuals with diverse functional needs during high-stress scenarios. Finally, it is essential that disaster recovery programs prioritize the restoration of accessible infrastructure, ensuring that post-disaster environments do not perpetuate or exacerbate pre-existing marginalization.

In conclusion, this study establishes a comprehensive framework for addressing the multidimensional challenges encountered by disabled individuals during disasters. By advocating for the systemic inclusion of disabled voices in disaster management and highlighting the diverse functions of the social work profession, this research provides a foundation for more equitable and effective disaster response strategies. Adopting this rights-based approach, which prioritizes human rights, social justice, and collaborative action, is not only a professional necessity for social workers but a moral imperative for global disaster risk reduction agendas.

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Rejection of Patriarchy in *Hedda Gabler* and *A Doll's House*: A Feminist Literary Analysis

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abstract

This research investigates the mechanisms of oppression faced by women within patriarchal structures by examining Henrik Ibsen's *A Doll's House* (Nora Helmer) and *Hedda Gabler* (Hedda Gabler). It posits that rigid social conventions actively restrict the female characters' personal autonomy and identity. Ibsen offers a critical perspective on the erosion of female individuality under masculine hegemony. Specifically, this study contrasts Hedda's psychological detachment—often attributed to the lack of maternal influence—with Nora's infantilized existence as a *doll* subjected to paternal and marital control. By adopting a feminist theoretical framework, this research explores the divergent trajectories of Nora and Hedda, highlighting how both protagonists navigate, or ultimately succumb to, male-dominated social orders. The analysis is grounded in a close reading of the original texts to reveal the profound complexities of these two characters and the disparate outcomes of their search for agency.

Keywords: *patriarchal society, Nora Helmer, Hedda Gabler, Henrik Ibsen, male domination, feminist theory*

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1. INTRODUCTION

The nineteenth-century European dramatic tradition serves as a critical juncture for the interrogation of gender dynamics and institutionalized social structures. Henrik Ibsen, as a foundational figure of modern realism, transformed the stage into a site of inquiry where the moral and sociological constraints imposed upon individuals—particularly women—could be rigorously examined. His works, *A Doll's House* and *Hedda Gabler*, function as seminal texts that document the struggle for self-actualization within the rigid confines of patriarchal hegemony. While traditional criticism has often labeled these protagonists through a lens of moral judgment, this study posits that Nora Helmer and Hedda Gabler operate as complex agents whose actions expose the systemic contradictions of their era. By employing the framework of second-wave feminism, this article shifts the focus from individual character flaws to the structural barriers that necessitate their respective paths of rebellion and destruction. Through this analysis, Ibsen's plays are revealed not merely as character studies but as sophisticated critiques of a society that rendered female autonomy both dangerous and elusive.

1.1. Historical and Sociological Context of the Nineteenth-Century Patriarchy

The social architecture of the nineteenth century was defined by a pervasive patriarchal structure that systematically marginalized women within both the domestic and public spheres. This era was characterized by a strict bifurcation of gender roles, often codified in the doctrine of separate spheres. In this system, the public domain—comprising politics, commerce, and intellectual life—was the exclusive domain of men, while women were relegated to the private sphere, designated as guardians of domestic morality and familial stability.

Legal frameworks of the time codified this subordination, effectively treating women as legal minors and extensions of their male guardians. Marriage acted as the primary mechanism for this state-sanctioned dependency, where a woman's identity was subsumed under that of her husband. Such conditions facilitated the commodification of women, reducing their societal value to their utility as wives, mothers, and symbols of their husband's socioeconomic status. Within this environment, any attempt by a woman to establish independent agency was perceived as a transgression against the social order. Consequently, Ibsen's female characters emerge from a reality where their lack of legal and financial autonomy functions as an structural instrument of oppression, forcing them to negotiate their identity through silence, deception, or ultimately, self-annihilation.

1.2. Literature Review

The academic investigation into Henrik Ibsen's female protagonists has undergone a significant evolution, moving from psychological character analysis toward a more robust sociological and structural critique. Early scholarship frequently analyzed the domestic failures of characters like Nora Helmer and Hedda Gabler through the lens of individual morality; however, contemporary researchers have shifted the focus toward the systemic power dynamics of the nineteenth century.

A critical dimension of this sociological critique involves the historical reception of Ibsen's work. As Ian Britain (1983, p. 23) observes, the social history of modern drama remains an underdeveloped field, largely due to the limited attention scholars have directed toward the complex relationship between a playwright's perceived persona and the specific worldviews of their contemporary

audiences. This methodological gap is particularly evident in the initial reception of *A Doll's House* in Victorian England. Britain (1983, pp. 14–15) documents how early adaptations, such as the 1884 production *Breaking a Butterfly*, deliberately sought to “trivialise, sentimentalise, and melodramatise” the radical tensions in Ibsen’s original text because the spectacle of a middle-class wife abandoning her domestic securities was perceived as “too un-English” for the contemporary public. These early acts of cultural domestication underscore the intense structural resistance faced by any attempt to redefine female existence outside of male-imposed identity.

Building upon this historical awareness, modern scholars have sought to deconstruct the patriarchal layers that defined Ibsen’s era. The transformation observed in modern European drama is rooted in the protagonist’s struggle to redefine existence outside the boundaries of traditional roles, representing a fundamental challenge to the societal structures governing the domestic sphere. This struggle is framed by Toril Moi (2002, p. 57) as the emergence of the “monster woman”—a figure who refuses to be selfless and acts on her own initiative, thereby rejecting the submissive role that patriarchy has reserved for her. By defying these codes, Ibsen’s protagonists violate the political and social boundaries of their time, positioning themselves as agents of transgression rather than passive victims.

This subversion of patriarchal narratives is further analyzed through Hélène Cixous’s critique of the binary oppositions within Western philosophy. Cixous and Clément (1986, pp. 63–65) argue that traditional literature has historically functioned to strip female characters of their agency, relegating them to a passive existence that reinforces masculine order. Ibsen’s departure from this phallogocentric narrative is significant; his female characters, such as Nora Helmer and Hedda Gabler, disrupt the *passive roles* assigned to them by resisting the scripted expectations of the nineteenth-century bourgeois household. Their transgression functions as an ideological awakening, signaling a rupture with the past and a commitment to autonomous personhood.

However, the interpretation of this awakening has often been contested. Joan Templeton (1989, p. 28) highlights that Ibsen’s plays have frequently been subjected to a *gentlemanly backlash*, where critics attempted to dismiss or trivialize the feminist undertones of his work by labeling his characters as narcissistic or morally corrupt. Templeton argues that these critics, by focusing on individual character flaws, sought to protect the patriarchal construct from Ibsen’s radical exposure of its oppressive nature. This tension is further supported by Paletschek and Pietrow-Ennker (2004, pp. 125–126), who highlight that the emancipation movements of the nineteenth century were met with intense structural resistance, framing the struggles of Ibsen’s characters as representative of real-world historical challenges.

By integrating these theoretical and historical frameworks, this study posits that Ibsen’s portrayal of women constitutes a sophisticated documentation of feminist concerns that anticipated the systematic critique of patriarchal authority. While Britain exposes the historical trivialization of these plays, and Templeton, Moi, and Cixous analyze the mechanics of agency, resistance, and the *monster woman*, this study argues that Ibsen’s characters are not merely tragic figures. They are active, transgressive participants in a profound historical confrontation with the patriarchal authority that sought to define—and ultimately limit—their existence.

1.3. Theoretical Framework

This study adopts the lens of second-wave feminism to examine Ibsen's female protagonists, positioning his work as a precursor to the systemic interrogation of patriarchal structures that characterized the mid-twentieth-century movement. While Ibsen himself famously maintained a humanist stance, his dramaturgy—specifically the portrayal of women struggling against domestic confinement and legal subordination—anticipates the second-wave emphasis on *the personal is political*. By applying this framework, this study moves beyond mere character analysis, treating the domestic sphere not as a private refuge, but as the primary site of ideological oppression.

The specific value of a second-wave feminist lens lies in its capacity to illuminate the intersection between individual autonomy and societal hegemony. Second-wave critique, as pioneered by thinkers like Simone de Beauvoir and Betty Friedan, dismantled the myth of the *feminine mystique*, arguing that societal structures are intentionally engineered to relegate women to the status of *the Other*. When applied to Nora Helmer or Hedda Gabler, this lens reveals that their crises are not psychological anomalies or personal failures, but inevitable reactions to an ontological trap. Nora's rejection of the domestic role is interpreted here not merely as an act of rebellion, but as a proto-feminist demand for subjectivity in a world that denies women agency.

Furthermore, this framework allows for a rigorous investigation into the societal resistance highlighted in the literature. By employing second-wave feminist concepts—such as patriarchy as a pervasive power system rather than a collection of individual prejudices—this study demonstrates how Ibsen's characters function as catalysts for structural exposure. Ultimately, the second-wave perspective empowers a reading of Ibsen that honors the radicalism of his historical moment while bridging the gap between nineteenth-century drama and the modern discourse on gender equality. It frames the *monster woman* as a subject reclaiming her right to exist independently of male definitions, transforming Ibsen's plays into a sophisticated exploration of civic and personal literacy.

2. ANALYSIS

2.1. The Socio-Historical Status of Women in Nineteenth-Century Europe

In the nineteenth century, women encountered severe socio-economic constraints, characterized by systemic subordination, poverty, and institutionalized patriarchal governance. Women were largely disenfranchised, facing limited access to education and labor markets, while being subjected to stringent legal restrictions. If a woman found herself unhappy within her marriage, she often possessed no legal right to divorce; instead, she was expected to devote her life to child-rearing and absolute obedience to her husband. As Fuchs and Thompson (2005, pp. 1-3) contend, the interference of societal structures in both the public and private lives of women functioned to restrict their agency, reinforcing a patriarchal hierarchy that viewed women as “guardians of tradition” rather than autonomous subjects. This societal contempt, rooted in an inherited history of conservative habits, systematically relegated women to a status of interiority (Abdulfattah, 2009, p. 116).

Economic instability, marked by the fluctuations of the Industrial Revolution, led to widespread social unrest. During these crises, women played pivotal roles in protests, yet their political and

professional rights remained contested. While figures such as Carmen de Burgos advocated for gender equality, equal employment, and reform in divorce law, conservative voices—including Pi y Margall—argued that female participation in the public labor force would inevitably undermine domestic duties and family education (Nash, 2004, pp. 242-243). Even when women sought professional independence through emerging fields such as telegraphy, they faced systematic exclusion, limited to a minority percentage of the workforce and significantly lower wages. As Simone M. Müller (2015, p. 27) observe, contemporary discourse often justified this exclusion by essentializing female nature, despite telegraphy's potential to create a new social entity for women.

Furthermore, urbanization and the migration of young people to cities often rendered marriage the only viable path to socio-economic survival, a phenomenon that trapped many women in domestic roles to secure their independence (Paletschek & Ennker, 2004, pp. 125-126). The era's ideological landscape was challenged by early feminist thinkers like Sarah Grimké, who argued that women had been treated as mere “animated toys” for male gratification, denied a public voice and intellectual agency (Taylor & Weir, 2006, p. 42). By the late nineteenth century, the feminist movement—defined by the belief that men and women should enjoy equal rights—began to gain momentum as a response to these deteriorating conditions and the ongoing marginalization of women (Raouf, 1995, p. 50). Ultimately, as Fuchs and Thompson (2005, p. 155) note, the history of European women during this period was defined by a constant negotiation between rigid societal criteria of submissiveness and an increasing drive toward emancipation, commercial participation, and intellectual self-actualization.

2.2 Henrik Ibsen: Life and Career

Henrik Ibsen, born in 1828 in Norway, emerged as a seminal figure in the evolution of modern drama. His early life was marked by significant financial instability following his father's commercial failure in the timber trade, a crisis that forced the family to retreat to a rural residence when Ibsen was eight. This period of isolation fostered an introverted intellectual development, during which Ibsen immersed himself in poetry and theology. Although he demonstrated early aptitude for painting, his father's economic constraints precluded formal artistic training. Consequently, at the age of fifteen, Ibsen was apprenticed to an apothecary in Grimstad, a small town south of Skien. During these formative six years, he began composing poetry while laboring to save funds for his relocation to Christiania (modern-day Oslo).

In Christiania, Ibsen's aspirations for university education were frustrated; however, this period facilitated his engagement with the burgeoning Norwegian literary circles, where he encountered the influential national poet, Bjørnstjerne Bjørnson. Ibsen's early dramaturgical efforts, such as the verse historical drama *Catiline*, initially met with limited commercial success and rejection by the Christiania Theatre. Nevertheless, his perseverance led to the acceptance and performance of *The Warrior's Barrow* in 1850. Subsequently, Ibsen was appointed as the head and resident poet of the theatre under the mentorship of Ole Bull. Despite initial failures with plays like *St. John's Night*, he achieved critical acclaim with *The Feast at Solhaug* (1856) and *Lady Inger of Østråt* (1855). Following a period of severe professional despair and bankruptcy, Ibsen eventually garnered government recognition for his contributions to Norse theatre, which afforded him the resources to travel and engage with broader European cultural currents. During his residency in Italy, he produced several of his most monumental works. Upon his death in 1906, his gravestone

was adorned with a hammer—a symbolic tribute to his youthful poem, which concludes: “Break me the way, you heavy hammer / At the deepest bottom of my heart” (Sturman, 2004, p. 9).

Ibsen is widely recognized as the progenitor of modern drama, a social critic, and the architect of realism. His work stands as an early, profound interrogation of gender dynamics and individual rights. He advocated for the spiritual and intellectual emancipation of women, positioning their autonomy as a central tenet of his thematic repertoire. Furthermore, Ibsen scrutinized the commodification of human relationships, depicting a society dominated by the power of capital, where love is frequently reduced to a transaction. Having spent 27 years in self-imposed exile, Ibsen returned to a society undergoing intense economic and political shifts, which deeply informed his portrayal of the domestic sphere as an entity often isolated from, yet oppressed by, the broader societal order. His dramatic corpus, characterized by an intricate blend of realism and symbolism, remains distinguished by its profound moral conscience, psychological credibility, and enduring social critique (Sturman, 2004, p. 13).

2.3 Symbolic Realism

In literary studies, realism denotes the artistic portrayal of life as it is, eschewing subjectivity and idealization. While the movement gained significant momentum in prose and drama between 1840 and 1870, few works from the early 1840s fully embody its tenets. Realistic drama represents a departure from the conventional structures of melodrama and comedy that dominated the late eighteenth century. This theatrical movement is characterized by a meticulous focus on character development, setting, and plot, providing authors with a platform to critically examine societal values. By presenting social, familial, and structural conflicts for the audience’s judgment, realism acts as a counter-discourse to the imaginative excesses of Romanticism, shedding light on societal injustices and hypocrisy.

Henrik Ibsen stands as a pioneer in this regard; his plays focus on the existential and socio-political circumstances of his time, systematically exposing social hypocrisy (Suleiman, 2010, pp. 11-13). A realist playwright constructs reality by presenting characters and events that reflect authentic human experience, minimizing direct authorial intervention. However, Ibsen’s approach transcends traditional realism through the infusion of *symbolic touches*. His social and political dramas often operate on dual levels: a concrete, surface-level representation of domestic life, and a deeper, symbolic layer that addresses complex existential themes. When direct exposition proves insufficient to articulate the nuances of a moral dilemma, Ibsen employs symbols to bridge the gap between the visible and the intangible. Works such as *A Doll’s House*, *Ghosts*, and *An Enemy of the People* exemplify this synthesis, functioning as realistic dramas deeply embedded with symbolic significance.

2.4. The Role of Woman in Ibsen’s Drama

Ibsen articulated his critical perspectives on politics, society, culture, and interpersonal relationships through his dramatic works (Suleiman, 2012, pp. 16-17). His plays frequently incited controversy due to his profound empathy for the plight of women in a male-dominated society. During the nineteenth century, women were socially coerced into performing the role of the *angel in the house*—modest, unselfish figures expected to prioritize familial loyalty above all else. Ibsen

emerged as one of the first dramatists to endorse a radical social revolution, driven by his acute awareness of women's systemic disenfranchisement (Bradford, 2007, p. 6). He consistently focused on the agency of married women, advocating for their right to spiritual and intellectual freedom. Ibsen posited that women must possess the strength and independence necessary to dismantle the oppression inherent in patriarchal structures (Suleiman, 2012, p. 26). Furthermore, he rejected the reductionist view that women were inherently narrow-minded (Hossain, 2016, p. 1). His perception of the female role was significantly ahead of his time, challenging an era in which women were often rendered wholly subservient to their fathers or husbands (Brockett et al., 2014, p. 148).

Ibsen delved into the profound psychological complexities of his female characters with unprecedented depth. Although his plays featured both men and women navigating the tensions between social reality and the pursuit of freedom, Ibsen's female protagonists were uniquely distinguished by their bold, revolutionary commitment to individual autonomy. He depicts women as individuals who liberate themselves from restrictive relationships to seek new existential trajectories. Self-actualization remains a predominant theme in his corpus, through which he reflects the inner psychology of his protagonists. Critics have long identified Ibsen's work as a catalyst for the feminist movement, as he was among the first modern dramatists to confront the social consequences of female marginalization. His works expose the multifaceted cultural, economic, and psychological conflicts that women encounter in daily life (Hossain, 2016, p. 1). Plays such as *A Doll's House* (1879) and *Hedda Gabler* (1890) served as a universal rallying cry for female identity and emancipation, cementing his status as a foundational figure in feminist drama (Suleiman, 2012, p. 30). Unlike idealized literary tropes of the period, his female characters are inherently human, complex, and flawed. Conversely, Ibsen often portrays his male characters with a critical lens, frequently depicting them as morally weak or professionally and emotionally stagnant.

2.5. An Analysis of the Character of Hedda Gabler

Hedda Gabler, as the daughter of General Gabler, enters into her marriage with George Tesman trapped between societal expectations and her own unfulfilled ambitions. Her character is defined by a desire for control—a trait often perceived as “masculine” within nineteenth-century social norms, which further exacerbates her sense of alienation. Rather than succumbing to the submissive role of an “angel in the house,” Hedda attempts to construct her own agency by manipulating the destinies of those around her.

Her disillusionment is evident when she attempts to redirect Tesman's career: “I was thinking... If I could get Tesman to go into politics” (Ibsen, 2005, p. 14). When Judge Brack informs her that Tesman lacks the wealth and status for such ambitions, Hedda's frustration peaks: “It's this rigid little world I've stumbled into... That's what makes life so miserable! So utterly ludicrous!” (Ibsen, 2005, p. 16). Consequently, she projects her disappointment onto her husband, whom she views as a “bargain” that failed to deliver (Ibsen, 2005, p. 22).

Hedda's rejection of traditional domesticity is marked by a disdain for familial symbols. When presented with Aunt Julie's embroidered slippers, she coldly remarks: “Scarcely for me” (Ibsen, 2005, p. 25). Her cruelty toward Aunt Julie—such as ridiculing her bonnet—is an act of defiance

against the domestic sphere: “These impulses come over me all of a sudden; and I can’t resist them” (Ibsen, 2005, p. 28). Furthermore, Hedda displays a stark lack of maternal instinct, which serves as a psychological departure from the era’s feminine ideals: “Oh, do be quiet...!” she snaps when Tesman praises her pregnancy (Ibsen, 2005, p. 31).

Her cynicism regarding marriage is profound. She describes her union as being “forever shut up in a compartment alone” with her spouse (Ibsen, 2009). As she confesses to Brack, her marriage is a “voyage toward death” because she felt she had “danced herself tired” (Jesdal, 2018). Seeking liberation, she attempts to play god in others’ lives, admitting, “I want for once in my life to have power to make a human destiny” (Ibsen, 2005, p. 45).

This drive for power manifests in her manipulation of Eilert Lovborg. Refusing to witness the “ugliness” of sickness and death at Aunt Rina’s funeral, she instead pushes Lovborg toward a “beautiful” end: “Will you not try to... do it beautifully?” (Ibsen, 2005, p. 48). Ultimately, her destruction of Thea Elvsted’s “child”—the manuscript—reveals her deepest desire: “Now I’m burning your child, Thea. Burning it, curly locks!” (Ibsen, 2005, p. 55). As Suleiman (2012, p. 48) argues, Hedda’s final decision to commit suicide is a definitive rejection of a society that offers her no meaningful agency, solidifying her status as a complex iconoclast trapped within a restrictive reality.

2.6. Analysis of the Character Nora

Nora Helmer, the protagonist of Henrik Ibsen’s *A Doll’s House*, occupies a central position as a figure caught between societal mandates and the burgeoning consciousness of her own individuality. Married to Torvald Helmer for eight years, Nora initially appears as the archetype of the “naive” Victorian wife, residing in a domestic space strictly governed by her husband’s authority. Beneath this surface, however, lies a complex individual who navigates the constraints of a patriarchal society through secret labor and moral defiance.

As Nora realizes the superficiality of her domestic existence, she undergoes a profound transformation. Her secret struggle for agency is revealed in her dialogue with Christine: “I was lucky enough to get a lot of copying to do... it was a tremendous pleasure... it was like being a man” (Ibsen, 2005, p. 12). This admission highlights her recognition of financial independence as a masculine privilege.

Her performative role reaches a climax during the *tarantella*, a dance that symbolizes both her compliance with Torvald’s desires and her internal psychological turbulence: “I can’t do it any other way... This’s the way” (Ibsen, 2005, p. 33). Torvald’s objectification of her is underscored by his physical possessiveness: “When I watched the seductive figure of the Tarantella, my blood was on fire... Aren’t I your husband?” (Ibsen, 2005, p. 35). This suggests that Torvald equates her existence with the duty to provide physical delight, disregarding her emotional depth.

The instability of their marriage is rooted in Nora’s realization that she is valued primarily for her aesthetic appeal: “a time will come when Torvald is not as devoted to me, not quite so happy when I dance for him” (Ibsen, 2005, p. 37). She recognizes that Torvald’s affection is conditional, resting upon her looks. This fragility is underscored by irony; while Nora seeks to “be free from care”

through her domestic sacrifices, she remains oblivious to the impending collapse of her social standing (Ibsen, 2005, p. 39).

The critical turning point arrives when Torvald's performative heroism dissolves upon learning of her debt: "I have often wished that you might be threatened by some great danger, so that I might risk my life's blood... for your sake" (Ibsen, 2005, p. 41). His hypocrisy—professing love but prioritizing his reputation—shatters Nora's illusions. Consequently, Nora asserts her intellectual autonomy: "I believe that before all else I'm a reasonable human being... I must think over things for myself and get to understand them" (Ibsen, 2005, p. 44).

This realization deepens when she confronts Torvald regarding their lack of intimacy: "Does it not occur to you that this is the first time we two... have had a serious conversation?" (Ibsen, 2005, p. 47). Her awakening is completed when she realizes that the "glorious" thing she expected—Torvald taking the blame for her—never occurs (Ibsen, 2005, p. 50). Her final decision to leave is validated by her reflection on her upbringing: "I was simply transferred from papa's hands into yours... I have existed merely to perform tricks for you, Torvald" (Booth et al., 2006, p. 112). By slamming the door, Nora rejects her status as a possession and initiates her pursuit of an independent reality.

3. RESULTS

The analysis reveals that both Nora Helmer and Hedda Gabler serve as archetypal representations of female resistance against patriarchal structures, albeit through divergent psychological trajectories. Nora's evolution is characterized by a transition from a domestic *doll* to a self-actualized individual. In contrast, Hedda Gabler is portrayed as a victim of her own social confinement, whose inability to navigate masculine norms leads to self-destruction. The following comparative framework summarizes their positions:

Similarities

Patriarchal Conditioning: Both characters are treated as commodities ("property") to be shielded from external harm, reflecting the 19th-century perception of women as dependents.

Dependency Frustration: Both women experience profound alienation arising from their systemic lack of autonomy and reliance on their husbands (Torvald and Tesman).

Subversion of Roles: Both characters defy the domestic spheres assigned to them, challenging the conventional expectations of the Victorian-era wife.

Differences

Agency vs. Fatalism: Nora chooses departure as an active pursuit of identity, whereas Hedda views death as the only viable escape from total male control.

Emotional Expression: Nora manifests her internal conflict through the *tarantella*, utilizing physical performance as a conduit for her frustration; conversely, Hedda represses her emotions, leading to internal fracture and eventual suicide.

Masculine Identification: Hedda exhibits more *masculine* traits in her desire for power and control compared to the initially child-like and whimsical Nora.

4. DISCUSSION

The findings of this comparative analysis reveal that Nora Helmer and Hedda Gabler operate as binary oppositions within Ibsen's exploration of the female question. While both characters are subjected to the crushing weight of 19th-century patriarchal norms, their reactions expose the tension between *emancipation* and *alienation*.

Nora's rejection of the domestic sphere functions as a proto-feminist manifesto; she shifts from a performative object ("a doll") to an autonomous subject. However, the open-ended nature of her departure invites a critical debate on the efficacy of her rebellion. Unlike Hedda, whose path ends in terminal stillness, Nora's journey is one of *becoming*. Yet, as indicated by the findings, Nora's future remains precarious. The *glorious* future she imagines is untethered from the material reality of a woman without financial or legal support in the 1870s. This suggests that Ibsen was not merely writing a success story, but highlighting the profound isolation that awaits any woman who attempts to dismantle the foundational structures of the family.

In contrast, Hedda Gabler represents the *paralysis* of the female subject. Her frustration is not born of a lack of opportunity, but of a lack of purpose within a system that renders her *other*. Her inability to express agency constructively leads to a *destructive liberation*. Thus, the discussion shifts from the question of "Who is the right society?" (Nora) to "Is there a place for the female subject at all?" (Hedda). This comparison suggests that for Ibsen, the struggle for identity is not merely about leaving the home, but about the psychic cost of challenging the ontological definitions of womanhood imposed by masculine institutions.

5. CONCLUSION

This study has demonstrated that Henrik Ibsen's dramatic corpus serves as an essential precursor to the Second Wave of Feminism, articulating the systemic persecution of women long before the formalization of gender studies. By navigating the dual trajectories of Nora Helmer and Hedda Gabler, this research illustrates that the *female condition* in the 19th century was fundamentally one of *ontological erasure*.

Nora's exit from the doll's house is a definitive act of intellectual sovereignty; by slamming the door on Torvald, she rejects the commodification of her existence and asserts that her duty to herself precedes her duty to her husband or children. Conversely, Hedda Gabler's trajectory illustrates the tragic consequence of the *denial* of such sovereignty. Where Nora finds the courage to embrace the ambiguity of a life without traditional anchors, Hedda, stifled by the rigidity of a society that offers no legitimate outlets for female intellect, chooses self-annihilation as her final assertion of agency.

Ultimately, Ibsen does not provide a single blueprint for female liberation; rather, he exposes the existential necessity of it. Nora and Hedda emerge as two sides of the same struggle: one representing the potential for radical transformation, the other the tragic fallout of systemic inequality. By interrogating these characters, this study concludes that Ibsen's work remains an enduring critique of any social structure that forces women to *perform* their humanity rather than

possess it. This research highlights the urgent need for future investigations to further map the intersectionality of class, legal dependency, and the performative nature of gender in late 19th-century European drama.

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Multimodal Translation Theory and Dynamic Equivalence in Animated Cinema: A Scene-Based Comparative Analysis of *Hotel Transylvania*

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abstract

In this study, the Turkish subtitle (Netflix) and dubbing translations of the animated movie *Hotel Transylvania* are assessed through a comparative and holistic approach within the frameworks of Eugene Nida's Dynamic Equivalence Theory and Multimodal Translation Theory. Based on the premise that meaning in audiovisual texts is generated not only through language but also through the interaction of distinct communicative modes—such as visuals, gestures, facial expressions, vocal performance, and visual context—both linguistic and non-linguistic elements are taken into account. In this research, the movie's original English dialogues serve as the source text, while the Turkish subtitles and dubbing translations constitute the target texts. Qualitative, descriptive, and scene-based comparative analysis methods are used to evaluate whether Turkish viewers experience a similar impact to the target audience, how cultural/linguistic elements are localized, and how humor and idioms are rendered. The results of the study indicate that dubbing translation—despite the requirement of synchronization with lip and body movements—provides translators with greater flexibility and a larger space for creative mediation in transferring cultural, linguistic, and multimodal elements. It also looks at the strategies used by translators to preserve narrative coherence and emotional tone when some of the visual or auditory cues have no direct equivalent in the target language, and assesses the combined effort of voice actors and editors in the resulting product. The present study seeks to contribute to the existing literature on audiovisual translation and to the academic debate on global me by showing the workings of dynamic equivalence and multimodal element in subtitling and dubbing. Subtitle translation, on the other hand, is seen as more restrictive due to technical limitations such as character limitations and reading speed, which often necessitate the omission, reduction or simplification of content.

Keywords: audiovisual translation (AVT), dynamic equivalence theory, multimodal translation theory, subtitling, dubbing, *Hotel Transylvania*, cultural adaptation, lip-sync

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1. INTRODUCTION

1.1. Background of the Study and the Evolution of Meaning in the Digital Age

Globalization and digital media have progressed at a rapid pace, facilitating an unprecedented international diffusion of multimedia assets and transporting complex audiovisual products across a variety of linguistic and cultural barriers (Smith, 2024). Within the framework of Translation Studies, Audiovisual Translation (AVT) has become a primary discipline for the management of this cross-cultural flow. In the contemporary digital landscape, the exponential growth of over-the-top (OTT) streaming platforms—frequently termed the *streaming wave* or the era of *Netflixication*—has fundamentally altered global media consumption patterns and accelerated the demand for rapid, high-quality localization (Choi et al., 2023; Moreau, 2025). This massive expansion of subscription video-on-demand services has transformed the traditional distribution of media, forcing translation workflows to adapt to highly dynamic transnational strategies (Díaz-Cintas & Hayes, 2023; Massidda, 2023).

Therefore, the traditional text-based translation paradigms and the literal word-for-word translation strategies can not satisfy the needs of modern audiovisual media. In cinematic storytelling, semantic weight is rarely limited to dialogue alone: a character’s eye contact, changes in lighting, and the tempo of the scene all play a part in construing the story. As social semiotic frameworks argue, translation in the digital age should not be viewed as a passive linguistic code-switching mechanism. Instead, it needs to be re-conceptualized as an active intersemiotic and intercultural mediation that harmonizes visual, auditory and textual signs across cultural barriers for functional efficacy.

1.2. Key Research Focus and Theoretical Framework

The main challenge in AVT is to achieve communicative equivalence without producing semiotic dissonance between what the audience hears, sees and reads. To study this multidimensional issue, this study builds a broad theoretical bridge by synthesising multimodal translation theory and Eugene Nida’s dynamic equivalence theory. Unlike previous analyses of *Hotel Transylvania* that primarily focus on isolated *linguistic shifts*, *deixis*, or *verbal humor*, this research provides a unique contribution by systematically mapping how these specific theoretical frameworks operate across both subtitling and dubbing modalities to preserve humor and character identity.

The study combines the semiotic channel model of Frederic Chaume and the social semiotic models of Gunther Kress and Theo van Leeuwen and treats the film text as an organic whole where visual and verbal signs interact. At the same time, the dynamic equivalence theory by Eugene Nida is used to underline the importance of the receiver’s response and claims that a translation is highly successful if it evokes a response from the target audience similar to the experience of the source audience.

Animated cinema is a very dense multi-modal environment, with exaggerated physics, caricature movements and rapid-fire visual humour, which requires rigorous multi-channel decoding and creative localization strategies. The study examines the translator’s shift from being just a text renderer to becoming an active cultural mediator, balancing semiotic cohesion with functional communicative impact.

1.3. Material and Methodology

The study uses a qualitative, descriptive, and scene-based comparative methodology to assess the functional efficiency of translation strategies in multimodal and technical constraints (Hsieh

& Shannon, 2005, pp. 1280-1282). The research corpus is the animated feature film *Hotel Transylvania* (2012), chosen for its high degree of rapid visual wordplay, cultural metaphors, and unique character kinetics. The analysis covers only the first 60 minutes of the film and concentrates on 10 main and supporting characters, which should constitute a representative sample of linguistic and semiotic shifts, for the sake of objectivity and replicability. In the empirical investigation, we examine the original English source dialogue and Turkish target modalities with the help of a systematic comparative matrix:

Subtitling (TT1) is defined as a diagonal translation mode in which spoken acoustic data is condensed into written screen text within strict spatial and temporal parameters (Gottlieb, 1994, pp. 101-121). This process adheres to a 35–40 Characters Per Line (CPL) ceiling and reading speed constraints measured in Characters Per Second (CPS) (Szarkowska & Gerber-Morón, 2018; Bogucki, 2018, p. 3).

Dubbing (TT2) is defined as a horizontal replacement process in which the source audio track is substituted with a localized vocal performance (Gottlieb, 1994, pp. 102-105). This process is governed by the requirements of phonetic synchrony (lip-sync), isochrony, and kinetic matching.

1.4. Research Questions

To meet the objectives of this consolidated approach, the investigation is structured along the following core research questions:

Audiovisual and Semiotic Interaction. How do the visual-nonverbal channels - e.g. character gestures, facial expressions and overall mise-en-scène in *Hotel Transylvania* influence the cultural localization choices and colloquial expressions in the Turkish target texts?

Technical and Constraints-Driven Shifting. How do the physical constraints of a phonetic synchrony -lip-sync- in dubbing and the spatio-temporal constraints of subtitling restrict, turn around or channel the translator’s lexical choices and the application of dynamic equivalence?

Comparative Multimodal Coherence. How do subtitling -diagonal translation- and dubbing -horizontal translation- differ in their preservation of visual humor, and which modality maintains a higher degree of multimodal coherence along with functional equivalent response for the target audience?

Table 1

Technical Specifications of the Research Material

Feature	Data / Detail
Movie Title	Hotel Transylvania
Production Year / Studio	2012 / Sony Pictures Animation
Analyzed Period of Time	00:00:00 - 01:00:00 (First 60 Minutes)
Source Language	English (Original)
Target Language (Dubbing)	Turkish (Gülseren BAYINDIR)
Target Language (Subtitle)	Turkish (Official Netflix Subtitles)
Number of Analyzed Characters	10 (Main and Supporting)

Source: Created by the authors.

2. THEORETICAL FRAMEWORK AND CONCEPTUAL BACKGROUND

Traditional translation and audiovisual translation (AVT) vary essentially in their active environments. Traditional text-based translation is mainly concerned with the linguistic dimension, whereas AVT is a multidimensional platform in which spoken words, written text, images, sound effects and music operate simultaneously to create meaning. With the growth of digital media platforms shaped through fast technological developments across television, cinema, and streaming media, AVT has emerged as one of the most vital, fast-growing branches within modern translation studies, crossing linguistic, cultural, social, and contextual boundaries (Ahonen, 2024, pp. 2-3).

In the process of audiovisual translation, the translator's role goes far beyond a simple code-switching operation between two language systems. Translators must look outside the limits of pure language to consider visual consistency, precise timing, acoustic performance, the emotional atmosphere of the scene, character mouth movements, and the overall rhythm of the screen image to ensure effective audience reception. AVT encompasses diverse modalities—including subtitling, dubbing, voice-over, and audio description each featuring distinct technical, semiotic, and communicative challenges (Aleksandrova, 2020).

2.1. Historical Development of Audio-Visual Translation

The history of audiovisual translation has always been linked to the evolution of cinema technology, starting with the intertitles of the silent film era and arriving at the current multi-channel digital systems. As international distribution grew, the need to move screen content across language barriers forced the industry to develop systematic ways of translating, broadly split between the opposing traditions of subtitling and dubbing (Karamitroglou, 2000). A basic point of reference for classifying these AVT modes according to the communicative channels they make use of is Henrik Gottlieb's (1994) classification.

According to Gottlieb's framework, translation strategies are structurally determined by the semiotic shift between the source and target channels:

Dubbing is classified as a *horizontal translation* because the original auditory channels of the source language are completely removed and replaced with new auditory tracks recorded by target-language voice actors.

Subtitling is classified as a *diagonal translation* because the source text's auditory verbal channel is simultaneously supplemented by a target-language written track on the screen.

When evaluated through modern systemic frameworks, such as Itamar Even-Zohar's polysystem theory, both modes act as vital instruments that actively expand, challenge, and transform the literary corpus and cultural structures of the target polysystem.

2.2. The Paradigm Shift: From Linguistic Equivalence to Multimodal Complexity

Until the late 20th century, translation studies was heavily restricted by the *linguistic turn*, which narrowly framed translation as an algorithmic process of code-switching between two static semantic systems. However, the explosive proliferation of screen-based digital media radically expanded the definition of a *text* from a static, paper-bound written form to a fluid, dynamic structure formed from sounds, images, spatial layouts, and physical movements. This major transformation initiated what is known as the multimodal turn in translation studies.

Mary Snell-Hornby's (1988) integrated approach represents one of the pioneering academic responses to this paradigm shift, arguing that translation must be re-evaluated not as a mechanical

linguistic operation, but as an active cultural, contextual, and performative act. Within an audiovisual context, rendering a scene—especially a humorous or emotionally charged one—requires far more than translating literal dialogue. It demands acute academic attention to the characters' physical transformations, kinetic speed, facial distortions—such as Count Dracula's sudden, exaggerated facial mutations when angry in *Hotel Transylvania*—, underlying sound effects, and integrated visual cues.

As a consequence, audiovisual translation can no longer be evaluated through lenses of formal or word-for-word linguistic equivalence. Instead, it must be addressed as an intersemiotic process—the transfer of meaning not merely across two syntactic frameworks, but across entirely different semiotic systems, allowing for the systematic reinterpretation, restructuring, and reconstruction of meaning as information dynamically shifts between verbal and non-verbal modes on the screen (Metin Tekin, 2019).

2.3. Multimodality: The Semiotic Architecture of Visual Communication

Multimodality is the systematic study of how meaning is co-constructed through the simultaneous interaction of multiple communicative channels working in tandem. Formulated and expanded by semioticians like Gunther Kress and Theo van Leeuwen, this conceptual framework fundamentally dismantles the historical, logocentric dominance of language as the exclusive or primary carrier of human meaning (Van Leeuwen, 2005). Under a multimodal lens, every single element presented on the screen—including color palettes, camera angles, kinetic movements, soundscapes, character expressions, lighting, and paralinguistic gestures—functions as an active semiotic resource playing a role in the overall meaning-making architecture in the text (Kress & Van Leeuwen, 2001).

This system redefines the identity of the translator. No longer viewed as a passive, transparent conveyor of dictionary words, the translator is recognized as an active, creative mediator and information engineer who decodes, interprets, and reconstructs a dense, multi-layered world of visual and auditory signs. Animated movies offer an exceptionally rich paradigm for multimodal analysis. Because animation is characterized by the deliberate manipulation of physical reality, highly exaggerated character kinetics, and rapid visual humor, it offers a complex semiotic puzzle where words cannot be separated from the visual and auditory environment in which they are embedded (Beer, 2010).

2.3.1. The Interplay of Four Semiotic Channels (Frederic Chaume's Framework)

Frederic Chaume (2004) has developed an empirical model to evaluate the operational mechanics of audiovisual texts that identifies four main semiotic channels working in parallel during a screen broadcast. In order to explain the strategic motivations that underlie a translator's choices, it is necessary to map these channels, as a change in one channel directly changes the functional weight of the others:

Auditory-Verbal Channel. Spoken dialogue, voice-over narration, internal monologues and explicit song lyrics belong to this channel. Crucially, this channel is never isolated; its semiotic delivery depends entirely on paralinguistic features such as pitch, tone, volume and stress. In *Hotel Transylvania*, for example, the authoritative, dominant vocal tone of Count Dracula often requires the translator to implement sharp, imperative linguistic structures in the target language in order to preserve character cohesion.

Auditory-Nonverbal Channel. This channel includes acoustic parameters besides regular language, such as background musical scores, ambient soundscapes, localised sound effects, and natural paralinguistic sounds—e.g. gasps, cries, groans or laughter—. It controls the emotional timing and the reality of the environment in the scene.

Visual-Verbal Channel. This channel includes all the written linguistic signs visible on the screen, such as environmental text—e.g. street signs, posters, book titles—insert titles, newspaper headlines, and interlingual subtitles inserted during post-production.

Visual-Nonverbal Channel. This channel includes the entire visual architecture of the screen layout, including lighting, color cues, set design—*mise-en-scène*—camera movements, and the physical kinetics, gestures, and facial expressions of the characters.

2.4. Eugene Nida’s Dynamic Equivalence Theory and the Functional Turn

To traverse the complex technical and semiotic limits of AVT, translators rely heavily on Eugene Nida’s foundational dynamic equivalence theory (1964). In direct opposition to literal equivalence which focuses on a rigid, word-for-word replication of source-text structures dynamic equivalence privileges the communicative function and the final response of the receptor. Nida claims that a translation is highly successful when the relationship between the target audience and the translated text triggers a reaction that substantially replicates the cognitive and emotional response elicited between the original audience and the source text.

The theory provides a strong theoretical basis for localized adaptations, transcreation and functional interventions in global media. The dense presence of cultural references, idiomatic expressions, youth slang and rapid wordplay means that literal translations in audiovisual translation are often a complete failure. Dynamic equivalence liberates the translator from linguistic fidelity so that the text can be changed, replaced or filtered culturally so that the audience can experience a similar humorous or dramatic impact. In animation, the content has to be universally accessible, immediate and entertaining for family audiences. Nida’s framework serves as a core guiding principle to ensure the coherence of narrative and function.

2.5. Dubbing: The Multi-Layered Art of Synchronization and Technical Elements

Dubbing translation is one of the most technically restrictive modes of AVT, in the form of a high stakes *juggling act* where the translator has to simultaneously balance semantic fidelity, phonetic constraints and natural acoustic performance (Chaume, 2012). As Frederic Chaume points out, a dubbing translator cannot just translate semantic meaning, but has to carefully construct a target script which will fit smoothly with the already available physical actions, breathing patterns and mouth movements that are shown on screen. The goal of dubbing is to maintain the —*auditory illusion*— that the audience hears in a 1:1 ratio, meaning that what they hear is completely consistent with the character’s lip movements (Bosseaux, 2015, pp. 27-29).

2.5.1. Phonetic Synchrony (Lip-Sync)

Phonetic synchrony is the alignment of the target wording with the explicit opening and closing of the character’s mouth. Special attention should be paid to labial consonants—like b, p, m, v, f—where the lips need to be seen to close. In fast-moving animations like *Hotel Transylvania*, with highly caricatured and rapid mouth movements, the translator has to hit these visual anchor points exactly, avoiding *overrun* (the character’s mouth moving silently) or “underrun” —the sound continuing after the lips have closed—(Chaume, 2012).

Table 2

Lip-Sync and Phonetic Comparison

Character	Original (EN)	Turkish Dub (TR)	Technical Analysis and Impact
Dracula	“I don’t know from ‘Zing.’”	“Haa “şıp” mıp bilmem ben.”	A perfect lip opening ensured with preserving the “A” sound. With adding “Haa” to the translated product.
Jonathan	“What? It’s a good jam. Don’t be a grandpa.?”	“Bu şarkı çok iyidir abi. Dedemleşme bak?”	The “d” sound is preserved while ensuring lip opening and closing at target language.
Quasimodo	“Bonjour, Monsieur Dracula!”	“Uyyy Dracula beycuğum!”	The character’s long mouth movement while saying “Bonjour” is changed with “uyyy” which allows us with a good lip-sync.

Source: Created by the authors.

Isochrony. Isochrony dictates that the precise duration of the dubbed utterance must perfectly match the exact timeframe of the original utterance, down to the fraction of a second (Williamson & Pedro Ricoy, 2014, pp. 165-166). If a character delivers a extremely concise, five-syllable sentence in English that translates into a long, grammatically complex Turkish sentence, the translator cannot use the literal rendering. They must instead compress the phrasing or utilize a *fast-talk* vocal technique to fit the technical constraints of the screen without sacrificing the scene’s semantic weight (Peter, 2018). Conversely, if the target language is too short, temporal gap-filling—expansion strategies—must be employed.

Table 3

Temporal Gap Filling (Expansion) Analysis

Character	Original (EN)	Turkish Dub (TR)	Technical Analysis and Impact
Dracula	“Now go and never return!” (3.0 second)	“Şimdi git ve asla dönme!” (3.0 second)	The mouth movement sequence was completed without any complication, since Dracula closes his mouth in this scene.
Quasimodo	“I What? Esmeralda, you smell it again?” (2 second)	“Ne? Yine mi kokuyu aldın Esmeralda?” (2 second)	He changed the original sound with the Black Sea dialect and elongations.
Dracula	“Whatever!” (1.8 second)	“Oğlum bak git!” (1.8 second)	Instead of making a long one-word translation, they chose to translate using a popular internet meme of the time.

Source: Created by the authors.

2.5.2. Kinesic and Paralinguistic Matching

Kinesic Matching. Requires the absolute alignment of spoken words and acoustic emphasis with the physical gestures, body language, nods, and kinetic movements taking place on screen. For example, if a character forcefully points at an object or pounds a table on a specific word, the corresponding target word must be strategically positioned at that exact timestamp (Bosseaux, 2015, p. 26).

Paralinguistic Matching. Focuses on preserving the raw emotional architecture, pitch, stress, vocal tone, and delivery style of the source performance. (Pettit, 2005)

2.5.3. *Advanced Technical Elements in Dubbing Operations*

A professional dubbing script must also manage complex acoustic engineering environments through specialized channel management:

M&E (Music & Effects) Channel Management. Dubbing studios isolate dialogue tracks while leaving the M&E channel untouched. However, script writers must note specific markers such as—effect or laughter—to indicate when a voice actor must step back to let the original mixed audio track carry the scene, preventing local audio overlays from degrading the film’s native sound quality. (Netflix, n.d.)

“Walla” and Crowd Effects. In busy background settings (like hotel dining rooms or pool scenes) translators will use *Walla* - the building of structured background crowd noise. This is dynamic equivalence . This is where you have off-script side conversations in the target language that are appropriate to the world—e.g. vampires in the background arguing about dietary restrictions , or tired werewolves complaining about parenting— instead of just having background monsters making generic non-verbal growls . This adds immense story depth .

Perspective Recording and Panning. Sound designers adjust the directional movement of the audio track—panning between left and right speaker channels— based on explicit directional cues marked in the dubbing script (such as left-g or right-u) to perfectly match characters flying or running across the visual frame. (Liu & Amirdabbaghian, 2025)

2.6. Subtitle Translation: Technical Constraints and Spatial Economy

However, in stark contrast to the performative flexibility of dubbing, subtitling is subject to strict laws of spatial economy and spatial-temporal reduction. Subtitles must be carefully designed to avoid creating a cognitive overload, and to avoid distracting the viewer from the visual humour and key developments of the narrative, because the target audience has to read text while watching fast-moving visual action, and to listen to the original background sound track (Díaz-Cintas & Remael, 2007, p. 9).

2.6.1. *Technical Specifications of Subtitling*

The spatial-temporal boundaries of subtitle creation are restricted by industry-standard metrics:

Spatial Limits. A subtitle block is strictly limited to a maximum of two lines on screen at any given time. Each line can contain an average of roughly 35 to 40 characters (including spaces and punctuation marks) depending on the platform’s specific specifications. (Van Loenhout, n.d.)

Temporal Limits (Reading Speed). Subtitles must remain on screen long enough to match standard viewer reading speeds, measured via Characters Per Second (CPS) metrics. Text exceeding these thresholds triggers immediate cognitive fatigue, forcing viewers to focus entirely on reading rather than enjoying the cinematic visuals. (Fresno & Sepielak, 2020, p. 416)

2.6.2. *The Reduction Strategy and Dynamic Equivalence in Subtitling*

The invisible technical barriers mean that a subtitle can seldom be a word-for-word transcription of the spoken dialogue. On the contrary, the subtitler works in the paradigm of functional minimalism, using the strategy of systemic reduction (Bogucki, 2004). It has to do with removing unnecessary language, cutting out repeated phrases , getting rid of redundant names or titles , and deleting words that have little meaning. Dialogue is usually reduced by 20% to 30%. In Nida’s

theory, this reduction of structure is not a loss of information but rather a very sophisticated manifestation of dynamic equivalence. The subtitler reduces dialogue to its semantic essence, thereby saving the cognitive resources of the target viewer and allowing sufficient time for the effortless understanding of visual humor, fluid character gestures and environmental signs.

2.7. Translation of Animation: Localization, Character-Based Transcreation, and Humor

Translating fast-paced animated features like *Hotel Transylvania* calls for skills far beyond simple bilingualism, requiring a profound cultural awareness, artistic creativity and an organic understanding of character-based transcreation. Animation is a highly semiotically cohesive medium, where the construction of character archetypes is accomplished through a detailed interplay of visual features, vocal accents and specific linguistic registries.

2.7.1. Transcreation of Humor and Cultural Filtering

Humor in animation is often based on rapid-fire puns, cultural idioms and visual-verbal synchrony. If the joke in the source language refers directly to an object or action that is visible on screen, the translator cannot translate it into a text that ignores that visual reality; they are forced to engage in an intersemiotic negotiation. However, if there is no direct equivalent in the target language for a linguistic joke, the translator will resort to cultural filtering and domestication strategies (Davies, 2009).

This is reflected in the different strategies used by the two modalities. As a result of the spatial constraints, subtitling often adopts a more formal and standardized register, sometimes rendering humor more literal or glossed. Dubbing provides a much more fertile playground for dynamic equivalence by harnessing the expressive, acoustic freedom of the voice actor. It allows for the complete replacement of source-text jokes with highly colloquial target-language idioms, slang, and localized cultural substitutes that feel immediately natural and relatable to the target audience.

2.7.2. Characterization Through Accents and Dialectal Adaptation

A major dimension of character design in animation is sociolinguistic branding through distinct vocal accents. In the original English version of *Hotel Transylvania*, characters are assigned specific accents to evoke culturally embedded stereotypes e.g., Quasimodo's thick French accent immediately signals culinary expertise, short-tempered volatile behavior, and eccentric volatility to Western audiences. (Satkauskaite & Kuzmickienė, 2022, pp. 36-37)

To evoke an equivalent functional response in the target polysystem, the translator acts not merely as a language mediator, but as a creative character designer. For example, by mapping Quasimodo's personality onto a localized regional dialect—such as the Black Sea *Laz* dialect in the Turkish dub—the translator taps into an existing domestic comedic trope (quick to anger, hyperactive, loud, yet intensely comical). This tactical adaptation ensures that the target audience instantly recognizes, categorizes, and emotionally connects with the character's designed archetype in an identical manner to the source audience, fully validating Nida's model of dynamic effect in the digital age.

2.8. Comprehensive Systemic Summary: Subtitling vs. Dubbing Matrix

Here is a structurally mapped systematic decision-making matrix showing the operational divergence of subtitling and dubbing strategies, evaluated through the combined perspectives of multimodal translation theory and Eugene Nida's dynamic equivalence framework, to conclude this theoretical framework:

Table 4*Subtitling vs. Dubbing Strategic Matrix*

Criteria	Subtitling Strategy	Dubbing Strategy	Relation to Nida’s Theory / Multimodal Framework
Space/Time Constraints	Character limits (Max 32-42 per line); spatial-temporal restrictions; strict CPL and CPS limits.	Lip-sync synchronization; strict temporal and physical boundaries; phonetic lip-sync, isochrony, and kinesic matching.	Defines the technical “invisible walls” that force translators to restructure or manipulate incoming information channels / Creating space for dynamic equivalence.
Language Register / Information Hierarchy	Formal and Standard register; focuses on Spatial Economy. Dialogue is condensed via systemic reduction (20–30% text elimination).	Colloquial and Slang-heavy; focuses on Phonetic and Rhythmic Synchrony. Preserves the auditory illusion via syllabic and labial matching.	Directly influences the capacity to elicit a similar response and evoke an equivalent emotional and cognitive response in the target viewer.
Cultural Transfer	Foreignization (Preservation); leans toward foreignization or literal glossing to preserve the native source soundtrack.	Domestication (Localization); maximizes Domestication and Transcreation, embedding highly localized cultural substitutes.	Operates as a cultural bridge; cultural filtering naturalizes foreign myths so they resonate intimately with domestic audiences.
Humor Transfer	Literal/Glossed puns due to reading time limits.	Cultural substitutes; highly colloquial target-language idioms, slang, and localized cultural substitutes.	Functional equivalence; playground for Nida’s dynamic equivalence to maximize comedic impact.

Source: Created by the authors.

3. METHODOLOGY

As emphasized from the very beginning, the research design departs from a simple, isolated translation comparison. The primary objective is to shift from a traditional, text-only perspective to examine the translation process through a broader, more dynamic lens. This methodology section demonstrates how the mechanics of the dubbing process are uncovered, revealing that the final Turkish audio track functions as a carefully engineered product of a holistic screen analysis. This process is driven equally by multimodal awareness and the pursuit of dynamic equivalence.

The study is structured as a qualitative case study because translation choices especially within the creative and visually stimulating medium of animation cannot be adequately captured through numbers or statistical metrics alone. This research is informed by Shazeen and Chandana’s (2025, p. 86) framework, which argues that animation translation must account for dual-audience reception by addressing the distinct linguistic and cultural expectations of both children and adults. Inspired by this dual-layered approach, an explanatory method is employed to observe the Turkish dubbing of *Hotel Transylvania* within its natural context and to clarify the underlying rationale behind

specific adaptation strategies. Consequently, the investigation extends beyond identifying what was translated; it isolates the specific ways in which the visual environment and the anticipated target audience response conditioned the translator's decisions.

3.1. Corpus Selection: Why *Hotel Transylvania*?

The primary material for this study is the 2012 movie *Hotel Transylvania*. The original English version and the Turkish dubbed version were systematically compared. *Hotel Transylvania* was selected for this study due to its high multimodal density and its heavy reliance on immediate comedic effect, which allows for the simultaneous testing of both multimodal translation theory and dynamic equivalence. The film offers an ideal framework for this joint analysis because it features:

Diverse Characters: The cast ranges from Dracula's overprotective father figure to Johnny's relaxed, modern slacker persona. Each profile requires a distinct vocal identity and a specialized linguistic register in the target language.

Extreme Movements: Due to the distinctive animation style of director Genndy Tartakovsky, characters exhibit exaggerated, lightning-fast kinetic actions. This characteristic places significant structural pressure on the translation to maintain absolute synchronization with the physical movements on screen.

Cultural Riddles: The source text is saturated with jokes, contemporary slang, and monster folklore specific to Western cultural contexts. The analysis focuses on how these elements are decoded and reconstructed using localized Turkish cultural signs.

3.2. Technical Constraints vs. Dynamic Intentions

The translator in AVT is always in a fight with the technical boundaries of the screen. In subtitling, the *enemy* is spatial and temporal: the 42-character limit per line and the duration a human eye takes to read text relative to the scene's pace. In dubbing, the challenge shifts to *lip synchronization*—matching labial sounds like P, B, M—and *isochrony*—matching the length of the utterance to the character's mouth movements—.

In the practice of audiovisual translation, technical constraints often dictate lexical choices more profoundly than the source text itself. Maintaining temporal alignment is essential; when a character makes a specific hand gesture, the target text must be calibrated so that a key lexical unit 'lands' at the exact moment of that gesture to preserve semiotic cohesion. This requirement highlights that the screen acts as an active agent in the translation process, fundamentally shaping the outcome. Drawing inspiration from the work of scholars such as Taylor (2016) regarding synchrony and Antonini and Bucaria (2023) concerning the creative management of screen constraints, this study views the translator as an *information engineer*. The translator must strategically strip away secondary linguistic details to safeguard the primary visual-verbal connection, ultimately ensuring that the final product possesses the natural fluidity of a work originally created in Turkish.

Table 5*Environmental and Graphic Translation*

Visual Element	Context	Turkish Strategy	Rationale
“Beware of Humans”	Hanging Sign	“İnsan Giremez”	Vital for plot understanding; forced narrative.
“Lizard Goulash”	Menu Board	“Kertenkele KeKebabı”	Domestication to match the auditory Laz chef.
Newspaper	Close-up shot	“Canavar Haberleri”	Translating only the high-impact visual font.
“Keep Out”	Door Sign	“Uzak Durun”	Matches the dark, gothic visual of the entrance.
Postcard	Mavis’s hand	“Cennetten Selamlar”	Visual overlay to maintain emotional tone.
“Monster Festival”	Banner	“Canavar Festivali”	Essential for the visual setting of the scene.
Exit Sign	Background	“Çıkış”	Standardized functional translation.
“No Sun”	Sunscreen bottle	“Güneş Geçirmez”	Humor depends on the visual-verbal pun.

Source: Created by the authors.

4. DATA ANALYSIS AND FINDINGS

The findings are presented using a standardized model that maps character kinetics to specific translation strategies across all analyzed scenes. This model ensures technical consistency by evaluating how the four semiotic channels interact with the translator’s choices.

Standardized Mapping of Character Kinetics: The model maps rapid physical movements of high kinetic energy characters such as Quasimodo to the application of dialectal adaptation and condensed phonetic phrasing to maintain isochrony.

Technical Consistency in Translation Strategy: For all characters, the analysis employs a consistent framework to evaluate how the visual-verbal channel—such as on-screen text or situational cues—determines the *forced narrative strategy* adopted by the translator. As Matkivska (2014, p. 38) highlights, the defining constraint of audiovisual translation is the synchronization of verbal and nonverbal components, which forces the translator to move beyond simple linguistic transfer. Building on this premise, this study focuses on how these technical constraints dictate translation choices, prioritizing plot-critical information to preserve multimodal coherence. By isolating the specific ways in which the visual environment conditions these choices, the analysis clarifies how the translator navigates the tension between linguistic fidelity and the requirements of the visual medium.

Synchrony Compliance: Dubbing strategies are evaluated according to a uniform criterion of phonetic synchrony, specifically labial consonants—b, p, m, v, f—in order to verify that the vocal performance is consistent with the character’s lip movements during the whole analysis.

4.1. The Intersemiotic Negotiation: Balancing Visual and Verbal Modes

Audiovisual translation in *Hotel Transylvania* demands continuous negotiation between dialogue,

visual movements, sound effects, and music. Translators re-code the total semiotic experience for a new cultural audience.

This chapter applies empirical data to show how Eugene Nida’s dynamic equivalence theory intersects with multimodal animation layers. Analysis of target language humor, culture, and language shows how translators achieve a comparable audience response.

The visual-nonverbal channel is the dominant one in animation. Physical actions are overdone. It gets its message across quickly. Fast timing means no long or formal sentences. Translators forego literal fidelity for multimodal coherence. This alignment manages viewer cognitive load. It is matched by visual action .

4.2. Comprehensive Character-Centered Strategic Analyses

This section demonstrates how meaning and structural choices were altered in the translation into Turkish. Your analysis follows the changes in the specific linguistic and physical identities of the characters.

The following overview details the rationale for the multimodal and functional across the cast. It shows how physical designs, color palettes, and kinetic cues directly impacted particular translation strategies:

Table 6

Character-Based Dynamic Equivalence and Multimodal Rationale Index

	Visual / Kinetic Cue & Color	Original Dialogue (EN)	Turkish Dubbing (TR)	Strategy & Implement Rationale
Dracula	Glowing red eyes / Aristocratic posture	“I don’t say ‘Bleah!’” / “Welcome to Hotel Transylvania”	“Ben öyle konuşmuyorum!” / “Otel Transilvanya’ya hoş geldiniz”	Phonetic preservation & register: Conserves bilabial openings while establishing his formal “Beyefendi” host status.
Mavis	Head tilt / Soft lines / Bright blue eyes	“Is it safe?” / “I thought we Zinged, Dad.”	“Gerçekten güvenli mi?” / “İlk görüşte aşk sanmıştım.”	Enthusiastic tone: Soft visual lines matched with high-pitched youthful delivery; localizes “Zing” as an emotional spark.
Johnny	Wide mouth / Jumping / Warm orange tones	“Whoa, awesome!” / “That’s how we do it! Half-pipe, baby!”	“Oha, müthiş bir şey!” / “Öğren de gel! Alırım bak anahtarını!”	Cultural & generational slang: Connects hyperactive movements to recognizable Turkish youth idioms and memes.
	Hyperactive motion / Distorted features	“Bonjour, Dracula!” / “I smell it! It is not a rat!”	“Uyy Dracula!” / “Uyy burnuma insan kokusu geliyu da! Fare değil bu!”	Dialect/Accent adaptation: Matches volatile kitchen persona with a culturally equivalent Black Sea (Laz) archetype.
Frank	Bared teeth / Heavy stance / Cool blue tones	“Fire bad!”	“Ateş kötü!”	Physical weight: Low-tempo, blunt delivery to match a heavy, muscular visual frame.

Murray	Bouncing body / Round bandage design	“Party time!” / “Here comes the party!”	“Eğlence başlasın!” / “İşte kamer de geldiii!”	Functional equivalence: Rhythmic tempo and target idioms match his boisterous, large body shape.
Wayne	Drooping eyelids / Messy fur	“Being a dad is hard.” / “Yeah, it’s a mess back there.”	“Baba olmak zor zanaat.” / “Birader alda arabayı temizle”	Parental fatigue: Sluggish speech pacing matching local archetypes of exhausted fatherhood.
Eunice	Finger pointing / Towering hairdo	“Frank, listen to me!” / “Bingo, Bingo!”	“Frank, beni dinle diyorum!” / “Çinko, Çinko!”	Genderlect & rhythm: Concise, high-frequency, rapid-fire nagging delivery to match her frantic hand gestures.
Griffin	Floating glasses / Invisible face	“I’m right here.” / “I stink at this!”	“Tam buradayım.” / “Bu oyunda bana ekmek yok!”	Acoustic autonomy: Compensation for missing facial features through highly natural, sarcastic idiomatic slang.

Source: Created by the authors.

4.2.1. Jonathan: Popular Culture, Slang, and Youth Sociolect

Johnny’s visual style relies on high energy: a bouncy frame, bright orange clothes, a skateboard, and wide-eyed facial expressions. Capturing this specific American slacker identity required a total departure from literal text. The translator chose local youth slang like *efsane*, *oha*, *çakma*, and *kanka* to make the character relate to Turkish teenagers.

“That’s how we do it! Half-pipe, baby!” doesn’t translate well on screen. They named it “Öğren de gel! Alırım bak anahtarını!” a well known line from a popular local Opet television commercial, featuring Cem Yılmaz. The words changed completely but the comedic energy was intact. Johnny uses slang words like *kanka*, *yıkılıyor* and *harbi* and sounds like a real teenager hanging out in Kadıköy or Beşiktaş, not a dubbed character.

The musical sequences demanded similar creative freedom. “Werewolf man give me a jam!” switcheroo The line “Hadi kurt adam girelim fa dan!” fits the natural rhythm of the scene. Later, when Johnny escapes Quasimodo’s kitchen, the translator replaced a niche Western reference to a Slipknot metal concert with a joke about a wine-and-cheese festival “Şarap festivalinde peynir kılığına girmiştım”. This change maximized the humor for local viewers. Throughout these edits, the fast-paced delivery from the voice actor fits Johnny’s constant jumping and frantic movements.

4.2.2. Count Dracula and Mavis: Traditional Register vs. Modern Expression

Count Dracula is a dual character, an ancient vampire aristocrat and a protective, exasperated father. He grounded his old-world status in a social framework Turkish viewers understand, with formal greetings like “Hoş geldiniz” or “Buyurun.” This option fits the usual etiquette between host and guest. The nearest natural equivalent of Nida has been reached.

The mouth movements of Dracula are phonetically sharp. The English “Welcome to Hotel Transylvania” begins with a bilabial—W—which is retained in the Turkish choice “Otel Transilvanya’ya hoşgeldiniz” by means of the rounded vowel—O—. When dealing with absurd

situations, Dracula switches to domestic colloquial expressions. For example, scolding the Zombies with “Alo napıcaksın mankeni. Let’s not get a job, dude adds a relatable comedic tone. In the sauna scene, swapping a generic question for the popular idiom “Ben ne bileyim münecim miyim!” maximizes his frustration. During the table-sliding sequence, turning “Whatever!” into the famous Turkish internet meme “Oğlum bak git!” increases the scene’s modern comedic punch.

But in contrary, Mavis has a youth goth-cute aesthetic with big eyes and soft visual lines. Bright blue tones lend support to an enthusiastic, high-pitched vocal style in her scenes. One of the key decisions is the word play, “Holy rabies!” – a monster play on Holy Cow–. A direct translation like “kutsal aşkına” or “kuduz aşkına” exposes her vampire status but could mislead child viewers. Evaluating her visual shock, with her mouth in a wide “O”, picking “aman yarabbim!” or “hadi canım!” preserves the emotional punch while the phonetic delivery matches her facial stretch.

4.2.3. *Quasimodo: The Hunchback*

Quasimodo is a very successful part of the movie’s Turkish version. The main finding is the perfect coherence between the character’s physical appearance and the dialect choice. Because Quasimodo is a very hyperactive and “impulsive” character, the fast-paced Black Sea dialect reflects his on-screen energy far more effectively than standard Turkish. My observation shows that using “uyy” instead of “bonjour” is a technical success in terms of lip-sync. In conclusion, the Turkish dubbing transformed a French chef into a local character, making the humor much more accessible for the Turkish audience.

Spoken lines are heavily condensed using short, punchy Turkish suffixes to keep pace with his rapid frame rate.

Phrasing like “uyy burnuma insan kokusu geliyu da! Fare değil bu!” blends his wide-open sniffing actions with local comedic tropes.

When yelling at guards, using “uşaklar” “açın hemen o gapıyı uşaklar!” reinforces his impulsive regional cook persona.

His rhyming boast “Quasi wins again. When you bump with the hump, You’ll land on your butt.” is brilliantly transcreated into a traditional Turkish folk-style rhyme: “Quasi yine kazandı. Saldırma onun kamburuna, oturtur seni tamburuna”. By abandoning a rigid, word-for-word translation in favor of a culturally resonant adaptation, this approach effectively preserves the comic impact of the original.

4.2.4. *Murray, Frank, Eunice, and Griffin: Structural Representation of Identity*

With a big round and bouncing high and hard, Murray the Mummy. Since his verbal humor relies heavily on American pop culture, the main approach is functional equivalence. When he shouts “Here comes the party !”, English word “comes” requires the bilabial closure of M sound . The Turkish translation, “İşte kamer de geldiii!” strategically places the M sound in “kamer”, according to his mouth shape, which is wide open. “Kamer” also makes for a perfect slang word for an essential, high energy party presence and helps his cool monster persona hit home in the target language.

Frank is gentle, moving with a lot of physical weight and slow, simple movements. His Turkish sentences are given in a rhythmic, ponderous cadence that fits his muscular build. In the warning scenes his voice changes a little from a reassuring tone to a sharp cautionary warning “Sen sen ol ateşten uzak dur. Ateş kötü!” The choice follows a classic comedic formula: confident strides are

immediately undone by visual threats.

Eunice features frantic kinetic energy, constant finger-pointing, and rapid-fire nagging complaints. Her rapid mouth movements require strict isochrony. When she emerges from her box, her rapid speech is met frame-for-frame with high-frequency Turkish delivery “Frank botoks randevumu aldın mı? Notre Dame’da yer ayırttın mı? Hiç bişey yapmadın mı?”, substituting localized modern concepts like “botox” for humor. In the Bingo scene, her reproach becomes “Bana Frankenstein!’in gelini derler. Benimle uğraşma”, capturing her high-society monster persona through a traditional, defensive genderlect register.

Griffin—the Invisible Man—is a special case, as we never see his face or lips. In your analysis, you track his presence entirely by the movement of his floating glasses. This structural lack makes the translator highly free from the phonetic mouth-matching and shifts the whole analytical focus to character personality and acoustic signs. The translation does not stick to a literal translation, but uses the natural Turkish idiom “Bu oyunda bana ekmek yok” when he says “I stink at this!” The free-from-lip, sarcastic, sharp vocal tone compensates for the lack of facial expressions, proving that tone of voice can function as an autonomous semiotic mode.

4.3. Cultural Transposition and the Strategy of Domestication

An important overarching finding in the Turkish localization of *Hotel Transylvania* is its heavy reliance on *domestication* strategies, as defined by Lawrence Venuti. Domestication involves making the translated text invisible by conforming it to the cultural, linguistic, and social norms of the target audience (Chaume, 2021, p. 204). In this film, this strategy is thoroughly multimodal; the translator matches the characters’ visual kinetic energy with recognizable cultural archetypes from Turkish society.

Table 7

Idiomatic Adaptation and Visual Harmony

Character	Source Phrase (EN)	Target Phrase (TR)	Applied Strategy
Dracula	“Holy Rabies!”	“Aman Yarabbim!”	Substitution / Functional
Johnny	“Check it out!”	“Bak hele!”	Dialectal Register
Quasimodo	“You fool!”	“Hamsi kafalı!”	Creative Localization
Wayne	“I’m exhausted.”	“Canım çıktı.”	Domestication / Idiomatic
Mavis	“Holy Smokes!”	“Hadi canım!”	Modernization
Frank	“Piece of cake.”	“Çantada keklik.”	Idiomatic Equivalence
Eunice	“Talk to the hand!”	“Lafımı bölme!”	Contextual Adaptation
Murray	“Rock on!”	“Kopalım o zaman!”	Youth Slang
Dracula	“Zip it!”	“Kes sesini!”	Imperative Shift
Johnny	“My bad.”	“Kusura bakma.”	Informal Standard

Source: Created by the authors.

Turkish dubbing works within a unique cultural tradition: local audiences expect to feel the comedic presence of an animated film rather than merely watch it. If these monsters spoke a cold, formal Istanbul Turkish, they would remain distant strangers on screen. By embedding regional dialects, internet memes, and localized parental vocal gestures, the translator eliminates the multimodal gap between the American animation and the Turkish audience. According to Mariana Yonamine (2022, p. 13) The translation takes advantage of the visual freedom of the

animation genre to re-invent the culture within the target language.

4.4. Analysis of Visual-Verbal Signs and Environmental Text

Meaning in *Hotel Transylvania* is frequently embedded directly within graphic materials, background iconography, and environmental texts. The following table details how these graphic elements were managed, revealing that when text is vital for story development, it imposes a forced narrative strategy on the translation.

Table 8

Environmental and Graphic Translation Analysis

Visual Element	Cinematic Context	Turkish Strategy	Methodological Rationale
“Beware of Humans”	Hanging Sign	“İnsan Giremez”	Vital for plot understanding; forced narrative constraint.
“Lizard Goulash”	Menu Board	“Kertenkele Kebabi”	Domestication to match the auditory Laz chef archetype.
Newspaper	Close-up shot	“Canavar Haberleri”	Translating only the high-impact, prominent visual font.
“Keep Out”	Door Sign	“Uzak Durun”	Semiotically matches the dark, gothic visual of the entrance.
Postcard	Mavis’s hand	“Cennetten Selamlar”	Visual text overlay to maintain the emotional tone of the scene.
“Monster Festival”	Large Banner	“Canavar Festivali”	Essential for clarifying the visual setting of the scene.
Exit Sign	Background	“Çıkış”	Standardized functional, low-impact translation.
“No Sun”	Sunscreen bottle	“Güneş Geçirmez”	Humorous impact depends entirely on a visual-verbal pun.
Visual Element	Cinematic Context	Turkish Strategy	Methodological Rationale

Source: Created by the authors.

4.5. Paralinguistic Elements and the Sound of Emotion

Table 9

Non-Verbal Auditory Modes and Localizations

Character	Vocal Sound	Narrative Context	Turkish Adaptation	Functional Effect on Audience
Wayne	Deep Breath / Sigh	Parenting stress	“Off ki ne off!”	Culturally specific auditory mode for heavy fatigue.
Dracula	Intense Hissing	Scaring humans	“Tıslama”	Maintains his traditional vampire semiotic identity.
Mavis	Soft Giggle	Seeing Johnny	“Kıkırdama”	Perfect acoustic match for her youthful visual pitch.
Zombies	Low Groaning	Moving luggage	“İnleme”	Synchronizes with slow-motion physical movements.
Frank	Muscular Grunt	Lifting weight	“İhh!”	Acoustically matches his massive, heavy visual frame.

Murray	Loud Laughter	Telling a joke	“Kahkaha”	Boisterous sound directly matches his large body shape.
Eunice	Sharp Gasp	Being shocked	“Hiii!”	Deploys the specific Turkish intake of breath for sudden shock.
Quasimodo	Sharp Sniffing	Smelling a human	“Koklama”	Exaggerated acoustic tracking matches his pointed nose design.

Source: Created by the authors.

4.6. Visual Semiotic Triggers: Color Cues and Phonetic Constraints

4.6.1. Color Cues and Translation Tone

The voice actor adds a growl, while the translator supports this visual peak by selecting words dominated by sharp, aggressive consonants—k, t, p, r—and urgent imperative verbs “korkunç,” “rezalet,” “kes sesini!”.

Table 10

Visual Color Cues and Translation Tone Alignment

Character	Visual Color Change	Emotional State	Translation Strategy	Applied Rationale
Dracula	Red (Eyes/Face)	Intense Anger	Aggressive Lexis	Use of sharp, imperative Turkish verbs to match the “red” visual alert.
Mavis	Bright Blue (Eyes)	Curiosity / Joy	Enthusiastic Tone	High-pitch vocal adaptation to match the visual brightness.
Johnny	Warm Orange (Clothing)	Relaxed / Friendly	Informal Slang	Matches his “warm” and approachable visual design.
Frank	Cool Blue / Grey	Sadness / Clumsiness	Low-tempo Speech	Slow Turkish delivery to match the “heavy” visual tones.

Source: Created by the authors.

4.6.2. Lip-Sync and Phonetic Constraints

Dubbing is governed strictly by phonetic synchronization, where the translator must respect the character’s visible mouth shapes (bilabial closure, rounded vowels, wide openings). Preferring “Böğğ!” in Turkish to maintain the closed-lip bilabial movement of the original English “Bleh!” eliminates the sensory contradiction between what the viewer sees and hears. When a character’s mouth is wide open in shock, selecting “Olamaz!” with its prominent rounded open vowel —O— stands as a phonetic necessity.

Table 11

Lip-Sync and Phonetic Constraints Index

Original Word	Character Mouth Shape	Turkish Choice	Phonetic Match	Multimodal Benefit
“Bleh!”	Bilabial (closed lips)	“Böğğ!”	B-Sound	Maintains the initial lip closure of the vampire.
“Monster”	Open / Rounded	“Mahluk”	M-Sound	Matches the labial starting point and open vowel flow.
“Please”	Spreading (smile)	“Peki”	P-Sound	The “P” and “E” sounds mirror the character’s facial stretch.
“No!”	Wide Open	“Olamaz!”	O-Vowel	The round “O” in Turkish matches the wide-open shock expression.
“Great”	Narrow	“Gerçekten”	G-Sound	Matches the throat-based sound and narrow jaw movement.

Source: Created by the authors.

4.6.3. Kinetic Speed and Rhythmic Synchronization

The physical pacing of a character dictates sentence duration a concept known as isochrony. Hyperactive characters require a *condensation* strategy to fit localized language into split-second frames without losing semantic value. Conversely, the slow, lethargic movements of the Zombies unlock an *expansion* strategy, permitting longer, more formal Turkish phrasing to fill the visual silence.

Table 12

Kinetic Speed and Rhythmic Synchronization Pacing

Character	Kinetic Movement	Speech Pace	Translation Result	Adaptation Strategy
Quasimodo	Hyper-fast / Erratic	Very Rapid	Condensed Text	Using short, punchy Turkish suffixes to keep up with the frame rate.
Zombies	Slow / Lethargic	Very Slow	Expanded Text	Using longer, formal Turkish words to fill the visual silence.
Eunice	Sharp / Pointing	Constant / Fast	Rapid-fire Delivery	Matching her rapid blinking with high-frequency Turkish speech.
Wayne	Sluggish / Tired	Heavy / Dragged	Stretched Vowels	Using “eee...” or “ııı...” fillers to match his weary movements.
Johnny	Bouncy / Energetic	Upbeat / Casual	Syncopated Rhythm	Matching his jumps with short, exclamatory Turkish words.

Source: Created by the authors.

4.7. Subtitling vs. Dubbing: A Multimodal Decision-Making Matrix

The structural divergence between subtitle and dubbing strategies comes down to their respective mechanical limitations, forcing meaning into distinct survival modes (Dubbing and Subtitling, n.d.). While subtitles are bound by rigid spatial boundaries, character-per-line (CPL) constraints, and reading speed limits, dubbing is governed by temporal, phonetic, and kinesic matching.

Table 13

Decision-Making Matrix in Subtitling vs. Dubbing

Evaluative Criteria	Subtitling Strategy (Spatial)	Dubbing Strategy (Lip-Sync)	Relation to Nida’s Theory
Space / Time Constraints	Character limits (Max 32-42 CPL); text reduction.	Phonetic lip-sync, isochrony, and kinetic matching.	Creating unique tactical paths for dynamic equivalence.
Language Register	Formal, standardized, and clean text strings.	Colloquial, dialectal, and slang-heavy phrasing.	Eliciting a highly similar emotional response in the target audience.
Cultural Transfer	Foreignization / Preservation of source items.	Domestication / High-intensity localization.	Cultural filtering to ensure immediate cognitive processing.
Humor Transfer	Literal / Glossed puns at the bottom of the screen.	Cultural substitutes and transcreated idiomatic frameworks.	Prioritizing functional equivalence over formal structures.

Source: Created by the authors.

In dubbing, the focus is on phonetic and temporal synchronization. There are no reading character limits at the bottom of the screen, but the physical mouth movements of the character establish an absolute ceiling. Cinematic study of Korean films in English dubbing, 2024 Dubbing provides a richer substrate for dynamic equivalence. The voice actor can utilize intonation, local dialects and paralinguistic cues. According to Zoë Pettit (2005, p. 51) The functional impact on the viewer is thus considerably stronger and more natural than the formal limitations of subtitling.

Table 14

Modal Dissonance and Tactical Shifts in a Single Scene

Scene Context	Visual / Semiotic Constraint	Dubbing Strategy (Lip-Sync)	Subtitling Strategy (Spatial)	Multimodal Result
Dracula’s Rage	Exaggerated open mouth (Bilabial closure).	“Bunu Bana Pasla!”	“Durdur şunu!”	Dubbing prioritizes P/B consonants for lip alignment; subtitles prioritize text brevity.
Johnny’s Slang	Rapid physical hand gestures.	“Kanka, baksana!”	“Bak!”	Dubbing fills the temporal void of the physical gesture; subtitles omit vocatives to save space.
The Monster Feast	Background iconographic signage.	No auditory mention.	[İnsan Giremez]	Subtitles assume the active burden of the visual-verbal channel.

Source: Created by the authors.

4.8. Summary of Findings

This comprehensive qualitative data analysis shows that the translator in AVT operates as an information engineer rather than a literal word-transferrer. The screen acts as an active agent shaping translation decisions, forcing meaning to bend to the physical and mechanical dimensions of the medium—whether that requires compressing a phrase to fit high-frequency mouth flapping, stretching an utterance to match a slow physical gait, or completely rewriting cultural references to preserve the comedic soul of the animation frame-by-frame and second-by-second.

The ultimate success of the localized version of *Hotel Transylvania* relies on this deep synchronization, proving Nida's key principle that the receiver's experience remains the definitive metric of translation quality.

5. CONCLUSION

Writing this study provided an exploration of the invisible world behind the screen. Translation in audiovisual media operates as a live negotiation unfolding second by second. You cannot separate the verbal text from accompanying visual and acoustic channels.

The present study explored the operation of Eugene Nida's dynamic equivalence theory in the context of audiovisual translation. The research extended the theoretical view to include multimodal translation theory as a related theoretical framework. The study reveals that the original emotional resonance, communicative intent and cultural punch are recaptured by putting primary and secondary character profiles under analysis in successful audiovisual translation. Nida's notion of dynamic equivalence offers a functional instrument for this purpose, but it requires to be structurally incorporated with the visual, kinetic and paralinguistic modes that manage the screen environment.

The results of the analysis provide empirical support for these conclusions. Different character profiles are examined and the failure of formal, literal translations in a comedy context is demonstrated. To get the same spontaneous laugh from a child in Istanbul that you get from a child in New York, the translation changes its tactics. Nida says that target receptors should be related to the message in the same way as the original audience's experience. This research supports that claim. The most functionally accurate translations are not literally word for word, intentionally, to protect character identity, visual pacing and core humor. The study draws attention to the creative challenges of audiovisual translators and the importance of linking translation theory with practice-based localization approaches.

To achieve the naturalness of expression, which Nida considered the main criterion of quality, Quasimodo's original persona was replaced with a recognizable Black Sea dialect, and Jonathan's dialogue was updated with localized Turkish youth memes and idioms. The stage version was less about a literal translation and more about hitting recognizable cultural and social touchstones. This strategy eliminated the foreign feel of the movie.

This alignment itself represents the truest triumph of the translation. From a multimodal perspective, the image dictates the rules in animation. As demonstrated in the analysis of Quasimodo, the translator avoided translating a generic French chef. The translator observed a volatile, hyperactive character on screen and recognized that a Black Sea regional dialect mirrored that kinetic energy and frantic frame rate. The comprehensive multimodal tables demonstrate that translators do not operate as passive linguistic transmitters. Instead, they act as active bridge builders who overhaul literal words to maintain the semiotic harmony of the scene.

This study reinforces Nida’s classic statement that the relationship between receptor and message should correspond to the relationship between the original receptor and message. The relationship in *Hotel Transylvania* is determined by the interactive process of dynamic equivalence and the multimodal translation theory which is achieved through three specific mechanisms:

1. Functional substitution: Translators replace untranslatable jokes specific to the character, such as “Zing”, with target expressions that resonate culturally: “Love at first sight” or “Bam”. This choice makes sure that the young viewers respond emotionally right away.
2. Sociolinguistic Mapping: The text maps the archetypes of animated characters—Wayne’s tired fatherhood, Johnny’s rebellious youth, Eunice’s frantic nagging—onto the Turkish society. Domestication is a strategy in Turkish dubbing. The local audience wants to feel the film in their own cultural space. The target audience can connect to the story on an emotional level when they hear a werewolf sigh like an exhausted Turkish father with the classic, dragged “Off ki ne off!” or when Johnny uses contemporary slang like “kanka”.
3. Visual-audio synchronization: Phonetic alignment and frame timing are strategic elements of dynamic equivalence, not technical problems. By associating Dracula’s closed-lip bilabial movements with “Böğğ!” instead of a literal text string, the illusion of reality is maintained, preventing sensory contradictions between what the child sees and hears.

The comparison between subtitling and dubbing points out that the translator’s role is a constant management through a number of semiotic channels. The translator is working under severe temporal and spatial constraints, be it dealing with spatial constraints at the bottom of the screen or phonetic mouth-matching in close-ups. These multi-channel constraints are not walls, but catalysts for creative localization.

When considering the ethical tension between domestication and foreignization, this paper discusses the debate between Nida’s receiver-oriented approach and concerns regarding cultural erasure. Extensive domestication takes priority here because it provides high levels of amusement and cognitive accessibility for Turkish viewers. This choice creates an ethical dilemma. Prioritizing immediate emotional resonance minimizes the visibility of the original American cultural production. While these strategies threaten to perpetuate cultural homogeneity by making foreign elements familiar rather than distinct, this study takes a clear stance: the immediate communicative needs of young viewers outweigh the requirement for cultural preservation. The primary ethical duty of the translator is to assist the child in engaging with the text. Effective entertainment and education require a strategy that bridges the cultural gap, even when that entails compromising literal fidelity to the source culture.

In the current literature on translation there are divergent opinions as to whether domestication always has negative consequences. Systematic application of a domesticating approach can enhance emotional engagement and inclusiveness, and can facilitate the young audience’s comprehension of the embedded narrative and its central values.

This study argues that in weighing this balance, the immediate goals of children’s animated media, education and entertainment, are the most important. To test this fragile moral equilibrium, future studies could follow the long-term effects of domesticated media on the wider cultural literacy of young viewers.

This study addresses the main research questions by exemplifying the Turkish localization of *Hotel Transylvania* as an ideal case study for the utilization of both dynamic equivalence and multimodal

translation theory in audiovisual translation. The study points out that the professional responsibility of the translator is much more than simply decoding a written text. The translator is required to actively choreograph multiple semiotic channels to reproduce the desired communicative effects for the target audience.

This research brings a fresh, multi-channel perspective to translation studies in Turkey. The analysis determines that high-quality, professional translation demands total harmony with every frame, color shift, sound effect, and physical movement on the screen rather than a simple exchange of words.

Viewers who evaluate these findings will look at audiovisual productions differently. The audience no longer merely hears the dialogue. The audience actively sees and appreciates the complex puzzles that the translator solves behind the scenes. Ultimately, this study highlights the efficacy and significance of the multimodal approach in both reading and translating the world.

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