

# «Shifts» and «Markedness»: Words or Terms? Terminology and Metalanguage Issues in Translation Studies Dictionaries, Encyclopedia, Handbooks and Coursebooks

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## Abstract<sup>1</sup>

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Prendendo le mosse dal volume *The Metalanguage of Translation* (2009) di GAMBIER & van DOORSLAER, questo studio propone una riflessione sulla terminologia in uso negli studi teorici sulla traduzione a partire da due vocaboli chiave tra quelli tecnici in uso, ovvero *shift* e *markedness*, ripercorrendone l'affermarsi e il modo in cui sono (o meno) utilizzati e sono (o meno) presenti in una selezione di enciclopedie, dizionari, libri di testo e manuali di larga diffusione. L'intenzione è portare in primo piano e quindi

all'attenzione - tra gli altri di chi guida e di chi frequenta corsi universitari sulla traduzione - sia la loro polisemia che può fungere da stimolo per analisi e confronti, sia come il loro significato specifico, spesso anche molto distante all'interno di precisi approcci, possa se non coerentemente presentato trasformarsi in un impedimento a cogliere l'articolazione di alcune teorie traduttive. La valenza polisemica di questi termini, attestatasi storicamente all'interno di specifici approcci, si affianca in dizionari, manuali e enciclopedie a un utilizzo parzialmente incoerente che vede predominare il senso più comune o generico delle due parole chiave. Tale uso può essere sviante ma anche sfavorire una visione articolata dei due vocaboli in materiali considerati punto di riferimento per orientarsi tra metodologie, approcci teorici e strategie o modelli traduttivi.

## **1. The conundrum of translation terminology**

Translation terminology is still a slippery slope at best and a real conundrum at worst. Among the many scholars commenting on this issue, Mary SNELL-HORNBY firmly argues: «[i]f it is the purpose of “technical” (here in the sense of “subject-specific”) terms to be clear and unambiguous, we can truthfully say that much of the terminology of Translation Studies has not fulfilled its aim» (2009: 127-128).

There is more than one reason why translation terminology is still wobbly, as James S. HOLMES (1972/2000) was extensively already discussing in 1972, but two main ones may be considered as crucial: the first is related to the parent disciplines Translation Studies branched from, i.e. Linguistics, Linguistic Philosophy, and/or Comparative Literature but also «more remote disciplines as information theory, logic, and mathematics, each of them carrying [...] paradigms, quasi-paradigms, models, and methodologies» (HOLMES 1972/2000: 173). The second one is possibly even more subtly relevant and urgent in contemporary theory work on translation as it deals with «the specific role played by language and languages in Translation Studies» (SNELL-HORNBY 2009: 124). Despite the independent status the discipline has gained across time, a number of «evergreens of scholarly dispute» (SNELL-HORNBY 2009: 124), for instance on the term equivalence, have not come to a definite solution or stabilised the term. The result has generated an increased «risk of non-communication» (SNELL-HORNBY 2009: 124): firstly, because terminology is used uniquely to

discuss complex language issues within specific language and culture communities or pairs of them; secondly, because a number of terms have become polysemous by being appropriated by various approaches on top of being borrowings from various branches of Linguistics, thus increasing chaos.

In the introduction to the *Dictionary of Translation Studies* (SHUTTLEWORTH & COWIE 1997/2014), confirms the first issue by pointing to the «multi-faceted nature» of Translation Studies and «the different branches of the discipline» that have made it difficult to clearly define its specific metalanguage once and for all. As a matter of fact, to compile their dictionary, SHUTTLEWORTH & COWIE distinguish between «“native” terminology» (2014: iv), born within the field, in this case Translation Studies, and those terms «coined in linguistics» (SHUTTLEWORTH & COWIE 2014: iv) and elsewhere, for instance, those borrowed from «completely different areas» (SHUTTLEWORTH & COWIE 2014: vii); a third category, the largest, is the one by which terms are created from «quite simply “normal” English words which are being used in a new, technical sense» (SHUTTLEWORTH & COWIE 2014: vii). The distinction between native and non-native terms informs their selection of entries and should also explain or entail omissions. Unfortunately, though, it does not prevent the volume from a number of repetitions, for instance within related entries, which increase the level of redundancy and scarcely encourage further investigation.

Few years earlier, in 2009, GAMBIER & van DOORSLAER had edited *The Metalanguage of Translation*, a collection of contributions dealing with both the fragmented nature of the discipline – as for schools, cultures, turns, and approaches – and the lack of consilience in the field (CHESTERMAN 2005, 2007). In that collection, offering a brief review on translation metalanguage, Leona van VAERENBERGH (2009) stressed the agreement among scholars and researchers (DELISLE, LEE-JAHNKE & CORMIER 1999, SALEVSKY 1994) on the proliferation of terms and their often unclear and overlapping conceptualisation. If polysemy and synonymy are to be understood as «a sign of research progress and dynamism», to quote van VAERENBERGH (2009: 46), they may be regarded both as an issue and as an opportunity. Polysemy is typically undesirable in language used for specific purposes and even more so when considered from a pedagogical perspective, and yet it is

widely acknowledged as common especially in the humanities. However, as translation terminology has become core in many translation course syllabi and university programs, students should be offered clearer information on the various theory-specific sense(s) and be encouraged to acquire and use it appropriately and consistently, as claimed by many introductions to reference and course volumes.

Within a rich and long term discussion in Translation Studies that has not yet led to any convincing closure for many words and terms, as well as in the wake of van VAERENBERGH's work (2009), this paper aims to contribute to the debate by bringing forward the case of two terms, i.e. *shift* and *markedness*<sup>1</sup> (including *marked/unmarked*) which are still inconsistently treated in various reference books. As they are often not offered accurate definition, they can be variously construed, increasing their semantic ambiguity and discouraging their use. A survey of both terms is carried out in order to assess consistent or inconsistent use within reference Translation Studies materials, such as dictionaries, encyclopedias and coursebooks. Offering a preliminary critical overview of the occurrences and use or misuse of these two terms, the paper examines the following reference books and the way the two terms feature in them: SHUTTLEWORTH & COWIE's *Dictionary of Translation Studies* (1997/2014), BAKER's *The Routledge Encyclopedia of Translation Studies* (1998), DELISLE, LEE-JAHNKE, CORMIER, *Terminologie de la Traduction: Translation Terminology* (1999), and GAMBIER & van DOORSLAER *The Handbook of Translation Studies, 2* (2011), MALMKJÆR & WINDLE *The Oxford Handbook of Translation Studies* (2011). Since terminology is an issue discussed also relative to courses, the analysis extends into four widely adopted translation coursebooks, i.e. BASSNETT's *Translation Studies* (1980/2002); *In Other Words* by Mona BAKER (1992/2011), *Language to Language* by Christopher TAYLOR (1998/2007), and *Introducing Translation Studies* by Jeremy MUNDAY (2001/2016).

## 2. "Shifts" and "markedness": words or terms?

A minority of terms belong to the native terminology type, SHUTTLEWORTH argues and they «derive from a number of sources» (SHUTTLEWORTH & COWIE 2014: vii), that is, some rely on «what one

might call “standard terminological morphemes”»; other terms combine «recognisable roots to create a semantically transparent compound (such as *minimax*, *polysystem* and *translatology*)» (SHUTTLEWORTH & COWIE 2014: vii). Unfortunately most terms come from common English words. In general English, *shift* as a noun means «a change in position or direction» (*Cambridge Dictionary*<sup>2</sup>, *sub voce*) and is thus a case in point; *markedness*, on the contrary, is a specific word that does not typically feature in general English, but is not a native term either, rather it is a borrowing, having been coined within phonology as early as in the 1930s.

The origins and trajectory of the term *shift* can be traced at the convergence of two disciplines, i.e. Linguistics and Translation Studies, gradually gaining currency in the latter as a term though a polysemous and unstable one. However, the origin of *markedness*, its evolution within a very specific branch of Linguistics and its absence both in SHUTTLEWORTH & COWIE’s *Dictionary* (2014) and BAKER’s *Encyclopedia* (1998) have led to the perusal of some other references, as it remains controversial whether the word has indeed turned into a term in Translation Studies or whether it is still just treated as a borrowing and thus subjected to frequent redefinition.

### **3. "Shifts", "shifts of expression" as entry in dictionaries and encyclopedias**

As a general English word, *shift* is both a verb and a noun. The latter most frequently features as a compound, such as «day/night/back/graveyard shift» to refer to «a group of workers who do a job for a period of time [...] or the period of time itself», (*Cambridge Dictionary*, *sub voce*)<sup>3</sup>.

In Translation Studies, *shift* acquires a specific meaning also as a compound, becoming a term in the 60s, when linguist J. C. CATFORD, in his *A Linguistic Theory of Translation* (1965) provides his own definition of the term. As MUNDAY (2016) sums up, following the Firthian and Hallidayan linguistic model, «which analyses language as communication, operating functionally in context and on a range of different levels (e.g. phonology, graphology, grammar, lexis) and ranks (sentence, clause, group, word, morpheme, etc.)» (MUNDAY 2016: 95), CATFORD introduces his systemic functional approach by way of his two main types of *shifts*, namely «category shifts» (CATFORD 1965: 73) and «level shifts» (CATFORD 1965: 73), that is, «departure from formal correspondence in the process of going from the

SL to the TL» (CATFORD 1965: 73). The former, «category shifts» (CATFORD 1965: 73), to which the Scottish scholar devotes most of his attention, is further divided into four subcategories, i.e. «structural shifts, class shifts, unit or rank shifts, and intra-system shifts» (CATFORD 1965: 76) and occurs when «a unit at one rank in one language is rendered in the other language by a unit at another rank, or when there are differences of structure, class, or terms in systems between an ST and a TT item» (MALMKJÆR & WINDLE 2011: 45). The latter, «level shifts», refers to changes occurring between the levels of grammar and lexis – e.g. something expressed by grammar in the SL may be expressed by lexis in the TL.

As Kirsten MALMKJÆR (2009) states in «Linguistics and Translation» in the *Handbook of Translation Studies* (Vol. 2), CATFORD has never been very popular in the Translation Studies community, as he is the «most regularly vilified proponent of a linguistic approach to translation» (MALMKJÆR 2009: 62). This becomes particularly interesting when reading SHUTTLEWORTH M. & COWIE M.'s rationale behind their selection criteria, in which they insist on the alien nature of some terms drawn from Linguistics, a discipline with

«many differing methodologies, some of which have been imported wholesale from other areas of academic study, and not all of which, unfortunately, have been entirely germane to the study of translation. This is perhaps particularly true of certain approaches adopted from various branches of linguistics» (SHUTTLEWORTH & COWIE 2014: vi).

That a large number of entries in translation terminology seems to come from various branches of Linguistics is a fact, but what does not seem appropriate, according to the author, is that there are terms which are not relevant to translation. Obviously, *shift* must be an exception and considered «germane» enough, as it is abundantly listed in several entries of the dictionary (it features 115 times all in all) and in many of its compound variants as well, that is, «category shift, class shift, intra-system shift, level shift, structure shift, negative shift\*, unit shift»<sup>4</sup>. It is worth noting that all the compounds refer back to CATFORD's theory and his classification which eventually accounts for an unfortunate number of repetitions within each separate entry. There is but one exception in SHUTTLEWORTH & COWIE's, that is, «negative shift», a term coined by the Slovak founder of the theory of literary translation, Anton POPOVIČ, to label «an incorrect translational

solution (or mistranslation) caused by a misunderstanding on the part of the translator» (POPOVIČ 1976). SHUTTLEWORTH & COWIE list «negative shift» as an independent entry and expectedly discuss it within POPOVIČ's definition of «shift of expression», that is, all «that appears as new with respect to the original, or fails to appear where it might have been expected» (POPOVIČ 1970: 79).

In SHUTTLEWORTH & COWIE's *Dictionary*, it is the plural form, i.e. «shifts», and «shift of expression» – again common in general English as well – that features as one single entry offering a definition of the term and a list of its compounds; the polysemy of the term is treated mostly relative to CATFORD and POPOVIČ, while other scholars, such as Kitty M. van LEUVEN-ZWART (1989, 1990) and Gideon TOURY (1978/1995/2000) are only briefly mentioned – LEUVEN-ZWART as the one who investigated the precise nature and distribution of phenomena that result from «the translator's personal stylistic preferences or from the translational policy or norms» (SHUTTLEWORTH & COWIE 2014: 153); while TOURY (1978/1995/2000) as the one who developed his own notion «distinguishing two varieties, the obligatory (e.g. linguistically motivated) and the non-obligatory (e.g. motivated by literary or cultural considerations)» (SHUTTLEWORTH & COWIE 2014: 153). Yet, the very first time the plural form «shifts» occurs capitalised in the *Dictionary* is expectedly within another entry, i.e. «accuracy», (fifth from the beginning) and it is somewhat associated with a quote by POPOVIČ, while CATFORD is not even mentioned, let alone other scholars. Surprisingly, POPOVIČ, whose «scholarly activities were the outcome of literary translations in the 1950s» (BILOVESKÝ & DJOVČOŠ 2016: 199) is not mentioned to list his own distinguishing categories, devised around *shift*, such as «constitutive shifts», «individual shifts», «retardation shifts», «thematic shifts», «generic shifts», and «rhythmic shifts». All these compounds cannot be retrieved anywhere in the *Dictionary*. Eventually, out of the 115 times the word *shift* is repeated – as singular and plural and as a single or multiword – unfortunately not all occurrences are terms.

As a matter of fact, *shift* is also used as a synonym of change, e.g. in a quotation by SNELL-HORNBY that is included in the entry labeled «Intertemporal Translation (or Cross-temporal Translation)» (SHUTTLEWORTH & COWIE 2014: 86-87), «shift in value and significance

as [the] world itself changes and develops» (SNELL-HORNBY 2009: 87); or used in one of its senses as a general word, i.e. «a job for a period of time», as for instance in «the task interpreters tend to work in 20-30 minute shifts» (SHUTTLEWORTH & COWIE 2014: 155). Besides, not all compounds are marked or signalled as terms in small capitals<sup>5</sup>. For instance, Dutch scholar van LEUWEN-ZWART's «microstructural shift» (SHUTTLEWORTH & COWIE 2014: 11) and «macrostructural shift» (LEUWEN-ZWART 1989, 1990) as well as TOURY's (1989, 1990) «obligatory shifts» (SHUTTLEWORTH & COWIE 2014: 6) and «optional shifts» (SHUTTLEWORTH & COWIE 2014: 6) are not in small capitals as expected in the dictionary. It is this sort of inconsistency in signalling terms that makes some of them puzzling beyond their polysemy. In addition, some omissions often make it difficult to fully recognise new compounds or approach-specific variants and their validity as such within Translation Studies.

Turning the attention to DELISLE, LEE-JAHNKE & CORMIER's *Terminology of Translation* (1999), the status of *shift* as a term in Translation Studies is completely jeopardized: the word, either singular or plural and/or as a compound, is not listed at all and features only once in the whole text, in its most common sense meaning "change".

In *The Routledge Encyclopedia of Translation Studies* (1998), BAKER has a generous and original thematic entry for «shifts of translation» (BAKER 1998: 226-231) and explicitly calls it a term: «[t]he term shifts is used in the literature to refer to changes which occur or may occur in the process of translating. [...] the notion of shift belongs to the domain of linguistic performance, as opposed to that of theories of competence» (BAKER 1998: 226). After a conceptual introduction, the entry «shifts of translation» that sees it «as a performance» (BAKER 1998: 227) is organised in two main sections: «[s]hifts and invariance» (BAKER 1998: 227-229) and «Definition and classification of shifts in product-oriented descriptions» (BAKER 1998: 229-230). BAKER does not introduce the term historically – CATFORD is only mentioned in the second section. Rather, she provides an overview of the term, distinguishing between «the domain of linguistic performance» and that of the «theories of competence». According to BAKER, «shifts in translation» should be understood, as «performance, therefore ought to be concerned with the dynamics of culture rather than the static contrastive description of languages and cultures» (BAKER 1998: 226-231). The first



reference is to Gideon TOURY but soon van LEUVEN-ZWART's theory is quoted as well, giving the impression that the many omissions (in terms of the various approach-specific compounds) are meant to be retrieved through BAKER's thorough analysis on the lexical item both at a diachronic and synchronic level. In *The Routledge Encyclopedia* index (BAKER 1998), the word *shift* is listed as plural and associated to about twenty other words whose corresponding page numbers all point to the same section mentioned above<sup>6</sup>. BAKER is strongly supportive of the relevance of the term as she argues «the concept of shift is especially relevant to the applied branches of Translation Studies: translation didactics and criticism» (BAKER 1998: 227). Yet, if searched by looking up names of scholars, *shifts* as a plural word occurs once next to POPOVIČ but neither as a compound nor associated to other words – in spite of the fact that «generic shift» is presented in bold characters as a specific term used by POPOVIČ to speak of «changes at the level of macrostylistics [that] cause the translation to fit a literary genre different from that of the original» (BAKER 1998: 230). As for CATFORD, the word is also listed alongside the linguist's name but as one single entry, redirecting to one page only, while no further mention is there in particular of CATFORD's compounds, i.e. «level shifts» and «category shifts», as one might have expected. Further lack of harmony arises when it comes to TOURY. Next to the Israeli translation scholar's name in the index, *shift* features in a phrase, namely «shifts and adequate translation» which is not to be found as such in any of the various entries provided earlier when listing the word (see full list in footnote 3). Besides, when BAKER discusses TOURY's «**adequate translation**» (in bold in the *Encyclopedia*), *shift* is not highlighted or signalled in any way as a term either as plural or singular, even though a definition of *shifts* is in fact provided and reads as follows: «The degree of correspondence taken as invariance within this method is adequacy at the textemic level, and shifts are defined as deviations from adequacy» (BAKER 1998: 230). Next to van LEUVEN-ZWART name, in BAKER's index, *shift* is no longer mentioned, though the scholar's name, as above said, is quoted in the entry BAKER devotes to the concept as a whole. Similarly to SHUTTLEWORTH & COWIE's *Dictionary*, BAKER's choices relative to *shift* as a term do not fully encourage direct access to its specific meaning either within a particular theory or approach. Thus, despite opening up many threads to acknowledge

the term polysemy and quoting several scholars who conceptualised the word as term, BAKER never offers any actual orientation tool on how scholars tend to appropriate and redefine the term to the extent that a lack of congruence eventually arises.

Expectedly, it is around CATFORD and his functional systemic approach to translation that revolves MALMKJÆR's «Linguistic Approaches to Translation», the fourth chapter in *The Oxford Handbook of Translation Studies* (2011). The focus is also on HALVERSON's cognitive linguistic approach that is applied to specific translational phenomena such as «translation universals» (2003) and «translation shifts» (2007). Indeed, chapter 6 opens on «Translation Universals» – an idea first raised by Gideon TOURY in the 1970s - and then moves to BLUM-KULKA's research work «Shifts of cohesion and coherence in translation» (1986/2004) that identifies «explicitation shifts» and «implication shifts», where she comes to the conclusion that «a translation will be more explicitly cohesive than its source text». Out of the 67 entries in *The Oxford Handbook of Translation Studies*, the word *shift* extensively features in some frequent compounds, typical of formal English, that cannot be considered terms, such as «cultural shift», «shifting boundaries», or it is to be found in linguistics multiword terms, such as «shift in register», «semantic shift», and «tense-shifting». The more general sense of the word, both as noun and verb, is also frequent and in some cases even inappropriately so, for instance alongside a scholar such as CATFORD, in chapter 7, «The Translator as Cross-Cultural Mediator»: «Catford was anticipating a major shift in thinking about translation that came to fruition with the advent of Translation Studies in the 1970s» (BASSNETT 2011: 68-76). Given the importance the word has as a term for the Scottish scholar in particular, but also in the handbook itself – as testified by the many entries in the index - its use as a general word should probably be avoided as it may become misleading and unnecessarily baffling for readers. There is one more technical use of *shift* by Francis R. JONES in his «The Translation of Poetry» (2011: 172-180), in which a brand new compound is coined, «adaptive shift» (JONES 2011: 176) that is presented in inverted commas and retrievable via the index. Tackling the creative aspect of translating poetry, JONES defines novelty «as any departure from ST [source text] structures» and «adaptive shift» as what «may be seen as creative: transferring rhymes to other words than those which bear the rhyme

in the ST, for example» (JONES 2011: 176). According to JONES, semantic novelty is «undertaken reluctantly if at all», while «adaptive shift» is «undertaken as a matter of course» (2011: 176) and in this sense it does not seem to be that far from CATFORD's «category and level shifts».

The first to use the word *shift* out of the 30 occurrences in the *Handbook of Translation Studies*, Vol. 2 (GAMBIER & van DOORSLAER: 2011), is Cristina MARINETTI in «Cultural Approaches» (2011: 26-30). The word, however, is not meant as a term: it is used three more times as a synonym for “turn”; or in its general sense as “change”, e.g. «a more general shift in epistemological stance» and «[b]y shifting the focus» (MARINETTI 2011: 26) or «a theoretical and methodological shift in Translation Studies» (MARINETTI 2011: 27). Other scholars in this handbook opt for *shift* both as a noun and a verb in its general sense, e.g. Dilek DIZDAR in his «Deconstruction» (2011: 31-36), and Outi PALOPOSKI in «Domestication and foreignization» (2011: 40-42). However, it is MALMKJÆR who clearly addresses the word as term and presents it, once again, within CATFORD's theory in her «Linguistics and translation» (MALMKJÆR 2011: 61-68), discussing the Scottish linguist's classification, «level shift» (shifts of sound, lexicon, grammar, text in the Hallidayan system) and «category shift» (shifts of structure, class, unit, or system). All other contributors use the word as a general one not as a term, thus continuing to contribute to the opacity of the word role within Translation Studies, e.g. Dirk DELABASTITA (2011: 71), James ST. ANDRÉ (2011: 85), Paul BANDIA (2011: 111), Carol O'SULLIVAN (2011: 124), Cecilia WADENSJÖ (2011: 143).

#### **4. "Shifts", "shifts of expression" in coursebooks and manuals**

Reference materials especially designed for class work and independent learning typically introduce and organise terminology through two main distinct text types: one is a more extensive though condensed in-context form, that is, a description in one of the chapters or sections of the main body of the manual, in which terms are highlighted in some way or other – e.g. using special font types, such as bold, italics or small capitals. The second most common text type, meant for quicker reference, is a glossary where concise definitions can be retrieved, sometimes along with page numbers. Another paratext that may be exploited is the index that can (but not always

does) list all the terms featured in the textbook. In some cases, even footnotes may be considered useful means to present further information or insights – consistency of use leads to including such footnotes in the index, but again this is not a standard practice.

In Susan BASSNETT's coursebook, *Translation Studies* (1980/2002), *shift* is only listed in the index as «shifts of expression» (2002: 85, 86, 90-91, 115). The word also features as a term in two footnotes summing up POPOVIČ's five types of *shift* – «constitutive shift», «generic shift», «individual shift», «negative shift», and «topical shift» (BASSNETT 2002: 138 f.11, 143 f.13). Entries of the word can be recorded elsewhere in the book both as singular or plural, noun (*shift*, *shifts*) or verb (*shifted*, *shifting*), mostly as a general word though, rather than as a term, meaning "change" – e.g. «there was also a shift in the status of the translator», (BASSNETT 2002: 12) or figuratively pointing to a turn/change in direction – see for instance «Shelley appears to shift from translating works admired for their ideas to translating works admired for their literary graces», (BASSNETT 2002: 69). When searching for CATFORD, a number of pages are listed in the index, but the most recurrent term associated with the Scottish linguist is «untranslatability» while his two classifications – «category shifts» and «level shifts» – are neither introduced nor discussed. If LEUVEN-ZWART is not listed in the index at all, TOURY comes up only when the polysystem approach is explored (BASSNETT 2002: 6-8). Eventually, Anton POPOVIČ is the only scholar whom the term *shift* is actually associated with, for the compound «shifts of expression» featuring three times (BASSNETT 2002: 85, 86, 90-1) in chapter 3, «Specific Problems of Literary Translation».

Despite the space BAKER devotes to *shift* in *The Routledge Encyclopedia* (1998) she edited, in her coursebook *In Other Words* (1992/2011), the word is less consistently used as a term. In most occurrences, *shift* is meant in its ordinary sense and only occasionally it can be identified as a technical more specific word. A tendency can be noticed to opt for *shift* as a quasi-technical compound or as a multiword applied to linguistic concepts and to translation as process, e.g. «a shift to passive», «the shift in information structure could have been avoided», «shift in style» – though it is not a specific linguistic term in any of these strings. Longer sentences also apply the same strategy, for instance the following: «Every

time this happens it introduces a subtle (or major) *shift* away from the lexical chains and associations of the source text. Significant *shifts* do occur, even in non-literary text. They include, for instance, cases where the source text uses a play on idiom to create a lexical chain or a number of separate chains [...]» (1992/2018: 214, emphasis added). Approaching the keyword search from a different perspective, namely looking for scholars who charged the word with technical reference, there are discrepancies to be noticed in who is quoted, how often, and whether this is kept both in the first and second edition of BAKER's coursebook. Take for example the second edition (2018): CATFORD is quoted once but not to introduce his *shift* classification and terms, rather to exploit his research in Anthropological Linguistics and to describe grammar non-equivalence among different languages: «[s]ome languages have rather elaborate person systems. Catford (1965) explains that Bahasa Indonesia has a nine-term pronoun system where English has only seven», (1992/2018: 105) – the same sentence is retrievable from the 1992 edition. In the first edition, the Scottish linguist's name features more often, as from the index, but taking a closer look to the chapters his name features more often in, the reason is simple: because it is twice indicated in «Suggestions for further reading», pointing to «Translation shifts» that is chapter 12 in CATFORD's famous book *A Linguistic Theory of Translation* (1965). Not listed in the «Subject index», *shift* is not even within the entries on coherence in spite of the fact that scholar Shoshana BLUM-KULKA, who investigated shifts of cohesion and coherence in translation, is largely quoted both in the first and second edition. As for her «shift in coherence» (1986/2000), it is only briefly touched upon once, in the following passage:

If the source text makes use of two or more meanings of an item and the translation fails, for whatever reason, to convey any of those meanings, whole layers of meaning will be lost, resulting in what BLUM-KULKA (1986/2000) refers to as a "shift in coherence" (BAKER 2018: 263, same entry in 1992 edition: 253).

Even less room is gained by other scholars who promoted a technical use of the word among whom POPOVIČ, TOURY – only one entry in the second edition (none in the first), that is, a footnote about the notion of norm (BAKER 2018: 50, f. 17). There is no reference to LEUVEN-ZWART.

*Shift* is not within the extensive glossary of key words and expressions in Christopher TAYLOR's coursebook *Language to Language. A Practical and Theoretical Guide for Italian/English Translators*. Neither is it to be found as one of the many highlighted terms, i.e. «printed in bold type when they first appear in the text» (TAYLOR 2007: 4), nor in any of the chapters in which the book is organised, not even in the one labelled «Linguistics and translation», in which HALLIDAY is extensively quoted and to whom a subsection "Theme in Halliday" is devoted. Scholars such as CATFORD, POPOVIČ, TOURY, LEUVEN-ZWART and BLUM-KULKA are nowhere to be found and their works are not in the bibliography either. In spite of this lack of prominence, the word *shift* is frequently used throughout the book especially as a verb and in a semi-technical meaning when it comes to describing linguistic aspects of translation procedures at a grammar or syntax level, e.g. «consciously shifting the information focus to the father in the syntactic change» (TAYLOR 1998: 8); or in «the meaning of an individual unit may alter as it shifts from being, say, an isolated word to being part of a group» (TAYLOR 1998: 69); but also in «verb in passive voice to shift information focus» (TAYLOR 1998: 70); and in «the job of translators is to shift elements of legal Linguistics across foreign languages» (TAYLOR 1998: 126); and once again in «by shifting the adjective pair to the end of the clause, the translator can put the information focus» (TAYLOR 1998: 314). As these extracts show, some of CATFORD's lesson has been clearly absorbed, as TAYLOR relies consistently on «level shifts» and «category shifts» without offering a full description or, for that matter, discussion of the Scottish scholar's approach. Reference to VINAY & DARBELNET (1995/2004) should also not be ruled out as the word *shift* was not used in describing the linguistic changes within the seven procedures of their direct and oblique translation strategies, but that approach might still be considered as a precedent (MUNDAY 2016: 88). The result is that the word *shift*, often used as verb, is perceived as connotated but is on the one hand deprived of its technical identity and scarcely adopted in a nominalisation structure that would typically bring forth semantic density; on the other hand, it is mainly offered as an action, reducing its formal strength and contributing to making its status within Translation Studies not polysemous but simply uncertain.

Finally, in MUNDAY (2016) *shift* is both in the contents and in the index. In the former, two of the subsections of chapter four «Studying translation

product and process» feature the word: the first is devoted to the Scottish linguist and his theory: «Catford and translation "shifts"»; the second one is more generic, «Option, markedness and stylistic shifts in translation» (MUNDAY 2016: viii). Surprisingly, in the index there is only one independent entry for *shift* that is «shifts in translation», but this compound does not seem to be used as a specific concept within a specific approach or theory at first; rather, it redirects to a somewhat general idea as «shifts in translation style» (MUNDAY 2016: 37) and as an emerging concept in a new theory branch: «The question of stylistic shifts in translation has received greater attention in more recent translation theory» (MUNDAY 2016: 98). The scholars MUNDAY (2016) cites are Giuliana SCHIAVI (1996), who borrows from narratology, and Theo HERMANS (1996). Both investigate linguistic choices to determine the intervention of the translator and their relationship to the ST author, relying on collecting data from TT to evaluate the style and intentions of the translator. Another compound, highlighted as a term and associated to *shift*, that MUNDAY discusses is «translational stylistics» (MUNDAY 2016: 98) that is linked to Kirsten MALMKJÆR (2003), who coined the term, and shares a similar perspective to that adopted by SCHIAVI and HERMANS. A corpus-based approach is also mentioned, one that is concerned with identifying the linguistic fingerprint of the translator «in a comparison between ST and TT choices against large representative collections of electronic texts in the SL and TL» (MUNDAY 2016: 98-99). Among the scholars operating in this direction, MUNDAY (2016) provides details on Mona BAKER's study (2000) of the lemma SAY and mentions works on literary translations from Spanish, Portuguese and Arabic against the British National Corpus used as a control corpus. Scrolling the index further, while looking for specific scholars and *shift* as a technical concept, there is no association that can be found next to CATFORD, POPOVIČ, TOURY, LEUVEN-ZWART, or BLUM-KULKA; they are all listed but no specific reference page offered for their theory-specific conceptualisation of *shift*. It is praiseworthy the effort MUNDAY puts into collecting and reorganising theories, methodologies and approaches from a diachronic perspective and by comparing and contrasting them to finally produce a critical reading that isolates strengths and weaknesses. However, as far as the idea of showing readers the way is concerned, judging from the paratexts so far taken into account – i.e. contents and index – it seems to be lost or less of a priority.

Eventually, one of the explicit aims MUNDAY claims to pursue in the introduction is also jeopardised: «[t]he aim is to enable the readers to develop their understanding of the issues and associated technical language (metalanguage), and to begin to apply the models themselves» (MUNDAY 2016: 1-2). Take for example POPOVIČ: there is one single entry in the index that takes the reader at page 100 where the Czech scholar is quickly referred to in a section labelled «Explorations: Definitions of style», namely a sort of *further reading* instead of a proper discussion of his theory. In addition, there are no further insights on POPOVIČ's use of the word *shift* as the term in focus is *style*. Somewhat more interesting is maybe the case of BLUM-KULKA whose seminal work «Shifts of Cohesion and Coherence in Translation» (1986/2000) is quoted, but when it comes to describing her perspective, the word *shift* is handled ambiguously, as in the following sentence: «changes in cohesion in translation may bring about functional shifts in texts» – the word change occurs where one would expect *shift* and the compound *functional shifts* comes across as a technical wording of a concept that is not introduced<sup>z</sup> (emphasis added).

MUNDAY's interest in the term *shift* within Translation Studies cannot be a matter of contention, as in 1998 in the essay he authored, «A Computer-assisted Approach to the Analysis of Translation Shifts» (1998: 542-556), right at the beginning, he declares that the concept he starts from is that of «translation shifts, which has been used in the past (notably by van LEUVEN-ZWART 1989, 1990) as a way of getting to grips with the small changes ("shifts") that build up cumulatively over a whole text as a result of the choices taken by or imposed on the translator» (MUNDAY 1998: 542). Two whole sections of this article by MUNDAY are devoted to *shift*, a word that is used 65 times in this same paper. The first section provides a historical overview that starts from CATFORD and his focus on syntactic and semantic shifts (1965), then moves into POPOVIČ (1970: 85) whose conceptualisation of *shift* is «a way of bringing to light "the general system of the translation" along the lines of Toury's later *norms* concept» (MUNDAY 1998: 543). LEUVEN-ZWART is then referred to as the one who offered the «most detailed model of shift analysis» (MUNDAY 1998: 543) in her doctoral thesis in Dutch, later translated in English and published in a shorter version in *Target* (1989, 1990); the Dutch scholar is the one who identifies as relevant «microstructural shifts (semantic, stylistic and pragmatic,



modulation, modification and mutation) between the ST and the TT» (MUNDAY 1998: 543) (comparative model) and some macrostructural ones based on HALLIDAY's three functions of language, i.e. interpersonal, ideational and textual, «and discourse concepts taken from Leech and Short (1981)» (MUNDAY 1998: 543) (descriptive model). LEUVEN-ZWART's method and findings – i.e. translation strategy is TT-oriented – bring her close to what TOURY (1978/1995/2000) calls the «norm of acceptability», that is, his recipe for what he calls «shift analysis» that he describes as follows:

the identification of shifts is part of the discovery procedures only, i.e. a step towards the formulation of explanatory hypotheses. The latter, in turn, necessitated the establishment of the overall CONCEPT OF TRANSLATION underlying whatever corpus one sets out to investigate (TOURY 1995: 85).

Thus «translation shift» is «a means of getting at the norms which govern the translation process» (MUNDAY 1998: 545). MUNDAY's second section is a complete assessment and description of corpus analysis and its tools to show how some of them – namely basic word statistics, type-token ratio, frequency lists, and KWIC concordance – constitute a series of «potentially powerful tools to help analyze translation shifts» (MUNDAY 1998: 548). This further material by MUNDAY clearly strengthens the point about *shift* as a term in Translation Studies, rather than a general word, while at the same time confirms a scarce consistency in its use and a tendency to exploit its polysemy.

## **5. "Markedness", "marked/unmarked": origin of the term(s)**

It was Nikolai Sergejevich TRUBETZKOY (1890-1938), in his «La phonologie actuelle» (1933), the first to introduce the theory of *markedness* or *merkmaltragend*, marker-carrier within the study of the language as sound(s). Originally, *markedness* was a term in Linguistics that referred to:

the phoneme as a bundle of distinctive features, which can be positively or negatively specified (“marked”) for a certain value. If two phonemes are distinguished by one single feature, it can be assumed that one member of

the pair is unmarked for the given feature while the other is marked (GAETA 2017).

Borrowing the concepts from TRUBETZKOY (1933), Roman JAKOBSON (1959, 1962, 1971) adapted the notion into the binary opposition *marked/unmarked* and «applied it to oppositions of lexical and grammatical meaning such as those between male and female animal names and between perfective and imperfective aspect in Russian» (HASPELMATH 2006: 28-29). The polysemic nature acquired by the term *markedness* and *marked/unmarked*, variously conceived in different branches of Linguistics, is devoted full attention by Edwin L. BATTISTELLA in two different volumes: the first, *Markedness: The Evaluative Superstructure of Language* (1990) and a few years later in *The Logic of Markedness* (1996). In his first book, BATTISTELLA is mainly concerned with investigating markedness values in semantics and phonology and does not deal with markedness as a borrowing that has gained currency in Translation Studies. However, the scholar contextualises the complexity of the term within languages arguing that

in addition to being contingent on the facts of particular languages, markedness values are also contextualized within a language. Values are not fixed, but rather are relative: cultural and linguistic structure acts as a context within which categories are evaluated, occasioning local reversals of general markedness values (BATTISTELLA 1990: 24).

In his second book, BATTISTELLA tackles the concept from the perspective of grammar (mainly generative grammar) and semantics as he simultaneously «aims at uncovering the historical parallels and divergences in the way markedness has been developed by Jakobson, Chomsky, and their respective followers» and «the ultimate goal is to discern whether there is a common core to Jakobson's and Chomsky's view of markedness» (BATTISTELLA 1996: 4).

Ten years after BATTISTELLA's second book, in a thorough if critical approach, HASPELMATH deals with the term and its historical origins in his «Against markedness (and what to replace it with)» (2006). He distinguishes twelve senses and isolates six main roles the term can play within the scope of various branches of linguistics, from phonology to morphology, from lexis and grammar to syntactic patterns. The twelve senses are organised in four

main classes, i.e. markedness as complexity, markedness as difficulty, markedness as abnormality, markedness as a multidimensional correlation (HASPELMATH 2006: 26). His conclusion, as anticipated by the title, is that the term is superfluous because of its polysemy and its many overlappings with more transparent common words, such as «uncommon/common, abnormal/normal, unusual/usual, unexpected/expected» (HASPELMATH 2006: 63). According to the scholar, the binary oppositions and/or asymmetries the term accounts for are better served by other less ambiguous terms or should be motivated by authors willing to use it.

Among other scholars, Fred R. ECKMAN, who has extensively written on the term since the 1980s and has also discussed it with reference to L2 acquisition, provides a widely quoted definition that contextualises the term and retains most of its core features:

The idea behind this concept was that binary oppositions between certain linguistic representations (e.g. voiced and voiceless obstruents, nasalized and oral vowels, open and closed syllables) were not taken to be simply polar opposites. Rather, one member of the opposition was assumed to be privileged in that it had a wider distribution, both within a given language and across languages. Imposing a markedness value on this opposition was one way of characterizing this special status: the member of the opposition that was more widely distributed than the other was designated as unmarked, indicating that it was, in some definable way, simpler, more basic and more natural than the other member of the opposition, which was in turn defined as the marked member (ECKMAN 2008: 96).

A quick addition to this definition should include that what is *marked* is very often considered more complex, less natural, and less frequent. However, the sense that has acquired more currency in Translation Studies seems to be related to what is perceived as standard as opposed to anything non-standard and therefore is more or less frequent mainly at syntax level, but also at word and phrase levels, for example, *marked collocations* are often under scrutiny – see MARCO (2013), «Tracing marked collocations in translated and non-translated literary language». However, «markedness as rarity in texts» can be traced back to both TRUBETZKOY (1933) and JAKOBSON (1959, 1962, 1971), but it is more specifically conceived as such by GREENBERG (1966) who:

emphasized the importance of frequency for markedness asymmetries, and he was the first to assign it an explanatory role in this context. Text

frequency/rarity has sometimes been taken as the basis for definitions of markedness, although for some reason many linguists seem to prefer vaguer terms like "typical", "normal", "usual" to the precise term "frequent" (HASPELMATH 2006: 33).

In the selection of reference books in Translation Studies this study is investigating, there are a number which bear no trace of the term *markedness* and its variants *marked/unmarked*. For instance neither SHUTTLEWORTH M. & COWIE M.'s *Dictionary* nor BAKER's *Encyclopedia* (1998) treat *marked/unmarked* or *markedness*, for that matter, as a term, that would mean listing them as separate entries in their index – the word is used in BAKER in a non-specific sense, both as adjective, meaning "significant", or as verb, meaning "characterised by" or "made distinct by".

Similarly, out of the 13 entries of either *marked/unmarked*, in *The Oxford Handbook of Translation Studies* (2011), the words are used generically and *markedness* is nowhere to be spotted. In his «The Translation of Poetry», Francis R. JONES (2011: 113-121) applies the term *marked* in a very specific way to describe the use of non-standard geolects by poets:

Source poets may deliberately use "marked" language varieties: language that, relative to the standard variety, is distinctively archaic or modern, informal or formal, regional, specific to poetry or typical of other genres, or simply idiosyncratic. Alternatively, language varieties that might have seemed unmarked to the poet may appear nonstandard to most modern readers (JONES 2011: 116).

Often *marked* is just a synonym for other words, such as "signalled", "indicated as", "labelled as" – see for instance in the following extract: «words with a high pitch or which are marked *fortissimo*» (BOSSEAUX 2011: 125). Gillian LATHEY uses the word while discussing the translation of children books, meaning "unexpected/untypical", «[i]n two marked instances of extratextual intervention by a translator and an editor» (2011: 135). The unstable quality of the word sense(s) can be noticed in two more sentences by LATHEY in which he uses it as an adjective: first meaning "significantly" in «a new understanding of children's abilities to distinguish between different registers has resulted in a marked increase in the representation of slang»; and then it is used meaning "strong" or "considerate" in «the globalization of the children's book market and of

children's culture generally is having a marked effect on translation» (LATHEY 2011: 140).

No specific entry can be found in DELISLE, LEE-JAHNKE & CORMIER's volume on translation terminology (1999) for the word as term, but there are generic instances, mainly pointing to "characterised", "signalled", "highlighted" or their opposites. For example in the following sentence: «[t]he French use of the pronoun *tu* to express familiarity between two people (as opposed to formal *vous*), could correspond in English to the use of a first name or nickname, or be marked by familiar syntactic phrases (ex.: I'm, you're)» (DELISLE, LEE-JAHNKE & CORMIER 1999: 126); and in «[a]ny unmarked current convention that is observed in a linguistic community and that constitutes the most probable formulation of a in a given communication » (DELISLE, LEE-JAHNKE & CORMIER 1999: 164). In DELISLE, LEE-JAHNKE & CORMIER (1999), though, *marker(s)* is to be found in a pseudo-technical meaning, that is, pointing to various linguistic, syntactic, rhetoric, narrative devices that signal or make visible the author, e.g. «[t]he apparent author may be an image consciously or unconsciously created by the true author, possibly as indicated by various markers in the text» (DELISLE, LEE-JAHNKE & CORMIER 1999: 120); or in «[s]ome grammatical and syntactical markers, such as double negatives (ex.: and don't nobody sneeze!), non-standard forms (ex.: it ain't me)» (DELISLE, LEE-JAHNKE & CORMIER 1999: 172).

Should this lack of focus on the term in reference books be taken as evidence of *marked/unmarked* and *markedness* as not being terms? or not being very well established in Translation Studies? Quite the opposite, as it turns out when coursebooks are taken into account – as discussed in the next section.

## **6. "Markedness", "marked/unmarked" in coursebooks and manuals**

In coursebooks, on the one hand, *markedness* does not feature as a term in BASSNETT (2002) in whatsoever form - there are just a couple of occurrences of the lexeme as phrasal verb, i.e. *marked out* and as fixed phrase *marked the start of*. On the other hand, it is richly represented in the index of BAKER's *In Other Words* (2011) and as one of the terms in bold within various of the book sections. Notwithstanding, BAKER's glossary has

no specific entry. A deficiency that is counterbalanced by BAKER's index presenting several compounds, such as *marked information structure*; *marked rheme*; *marked thematic structure*; *marked theme*; *marked/unmarked*; and *collocational markedness* – this last compound also features in the Contents as a subsection of chapter 3. Such irregularities in the paratexts confirm the potential of the term as well as its instability and the scarce accuracy it is handled with - as it shifts from one area of Linguistics (word and phrase level) to the next, e.g. sentence and discourse level. For instance, in BAKER (2011), it is mainly exploited to discuss syntax and thematic structure as a device to create emphasis, increase expressiveness, and/or to shift the sentence focus thus highlighting a pragmatic meaning that needs to be inferred beyond literal sense.

As it operates at phonetic, collocation, word order and other grammar levels, *markedness* is construed to address or point to any form that is away from standard, complex or atypical as opposed to expected, more simple or natural ones, but it is often also associated with structures that are more formal or very colloquial in spite of the requirement of a specific context. In one of its first occurrences in BAKER (2011), *markedness* is *collocational markedness* and is «an unusual combination of words, one that challenges our expectations as hearers or readers» (BAKER 2011: 55). This first entry is somewhat enriched by an endnote reminding that «markedness is an important concept in language study», extensively discussed in theoretical linguistics by LYONS (1977). The role of the endnote gains importance when BAKER uses *unmarked* yet in a new sense that triggers the need for a new definition: «Unmarked here means that it is the form normally used unless the speaker specifically wishes to highlight the distinction» (BAKER 2011: 129, note 6). The scholar is clearly aware of the term failure to hold, to remain specific to one sense; even when its meaning may be reduced to «markedness as complexity» or «markedness as abnormality» – to borrow from HASPELMATH (2006) – there is always the need to (re)define what aspect/structure/linguistic chunk is under scrutiny or pointed at as *marked* and relative to what standard the comparison is meant to be understood. If not explicitly so, in the way she uses the term, BAKER (2011) shows – contrary to what HASPELMATH (2006: 27) argues – that she is well aware of the term polysemy and that it is up to the speaker to isolate the

linguistic area and the specific sense out of the various ones the term can convey.

For instance, when gender as a grammar category is tackled and feminine and masculine nouns for professions are compared and contrasted in various languages and cultures, *marked/unmarked* point to those languages in which using feminine and/or masculine is perceived as standard or non-standard: wherever feminine and masculine nouns for professions are expected, listeners/readers perceive them and their propositional meaning (no connotation or implicature intended); on the other hand, those languages in which feminine/masculine nouns for professions fall into the category of expressive meaning, that is to say, they are unusual/abnormal, connotations and implicatures arise and listeners/readers are faced with an unexpected sense that requires disambiguation, as it is more complex and potentially ambiguous. Such *markedness* identifies not only a specific distinction in grammars that share the same category, but points to distinct linguistic habits that impact on meaning and eventually on the message. Asymmetries of this sort take us back to CAIRN (1986) and *markedness* considered as either within perception or production: the process of translation stems from perception but then requires an act of choice to convey as much as possible from ST to turn it into production in order to shape a TT. An equally inspiring area of investigation arises if *markedness* is understood, following COMRIE (1986), as what is expected and therefore natural in language, as opposed to what is unexpected therefore more complex in language. In Translation Studies, having to deal with language pairs, COMRIE's point is noteworthy as what may be perceived as expected in one language and culture may result unexpected and controversial in a target culture and language, despite formal correspondence. What is expected typically differs in different cultures. Therefore, once *markedness* has been detected in a source text, the translator is required to evaluate what sort of *markedness* they are dealing with and how and when it is best to convey it in the TT or compensate for it through some procedure/strategy or other.

BAKER also tackles the issue of the «unmarked masculine form *he* in English» (2011: 100) to discuss some more gender-balanced, popular forms that can be considered alternatives, e.g. «*s/he, he or she* and *him or her*» (BAKER 2011: 100 – in italics in the original). In spite of the fact that they may be perceived as acceptable, they partly convey a connotative meaning

that is, they are non-standard or marked forms, say, perceived as complex in some communicative context or text with a highly specific linguistic function. As a matter of fact, gender is one of those grammar categories that typically triggers more complex translation strategies and procedures due not merely to language restrictions and formal requirements, but also to the main linguistic function of a text. To illustrate the translation problems arising from gender distinctions requirements and or connotations in SL and TL, BAKER (2011) offers another example and relies on the word *marked* to discuss the translation of a promotional text – originally meant to address both male and female buyers. By moving the ST information into a target culture with more strict stereotypical gender roles, a grammar category intervenes in the meaning, potentially altering the final message and distorting the function of the TT, by including too large an audience rather than addressing a more specific, culturally accurate, group.

Later on in the book, when it comes to thematic structure, yet again terminology needs redefining. As a matter of fact, BAKER (2011) introduces the idea of *marked vs. unmarked sequences* and since she no longer deals with grammar categories nor with word order, a new sense has to be brought to the foreground. What is at stake at this point is foregrounding information through syntax and information organisation: *markedness* is thus to be understood in terms of lexical choices, meaning (un)predictability and transparency/opacity.

Meaning, choice, and markedness are interrelated concepts. [...] Meaning is closely associated with choice, so that the more obligatory an element is, the less marked it will be and the weaker will be its meaning. [...] The less expected a choice, the more marked it is and the more meaning it carries; the more expected, the less marked it is and the less significance it will have (BAKER 2011: 141).

The point BAKER is developing in this chapter has to do with a change of perspective whereby clauses and their organisations in a sentence are less and less understood as a «string of grammatical and lexical elements» (BAKER 2011: 132) and more and more as a message aimed at «an interactional organisation which reflects the addresser/addressee relationship» (BAKER 2011: 132) and plays on clear progression, coherent point of view but also «special effects, such as emphasis, by employing marked structures» (BAKER 2011: 132). On thematization, BAKER (2011)



sheds light on the relativity and gradability of *markedness* in clauses and, generally, in a source text analysis for translation purposes – e.g. in declaratives a theme subject is to be expected and thus it is unmarked as much as it is unmarked a verb as theme in imperative clauses, yet in a declarative a fronted verb or predicate would be highly marked. Clearly Linguistics and Translation Studies here diverge and what is identified as *marked* follows different priorities. Not only is there higher or lower *markedness* in a clause depending on its codified structure, or expected use, but the degree is also tied to its prominence and overall discourse features, genre or subgenre – e.g. in travel brochures or guidebooks, adverbials or locative themes are very frequent and therefore not as *marked* as in other discourses; in almost all genres fronting a direct object or other complements in English is regarded as particularly *marked* and the intent is «to provide contrast and to emphasize the speaker's attitude to the message» (BAKER 2011: 145). Moving from written to spoken language and from speaker-oriented to hearer-oriented distinction between theme and rheme, BAKER devotes some subsections of chapter 5 to information structure and *marked* tonicity, namely «[m]arked vs unmarked information structure» (BAKER 2011: 166-167); one to «marked rheme» (BAKER 2011: 167-170) and finally one to «marked structures in FSP» (rimando), that is, Functional Sentence Perspective. The extensive argument BAKER (2011) commits to in order to disambiguate *markedness* at different levels and structures, contribute on one side to the term increasing importance as metalanguage in Translation Studies both within a theoretical and a more practical approach; on the other hand, it is odd and puzzling that she did not include the term in the *Encyclopedia* she edited for Routledge (1998).

In TAYLOR's *Language to Language* (2007) there is no index, but there is a glossary listing terms in bold along with a brief definition. Among them, there are three variants for the word currently discussed, namely *marked*, *marker*, and *unmarked* and each has its own separate entry – though no page number is offered to go back to. Unlike BAKER (2011), who uses *marked/unmarked* both at word and clause level, TAYLOR tries to avoid some of the meaning ambiguities the term may cause by adopting the word *marker*. Typically, a *marker* signals grammar categories at word level (mainly it deals with morphology). The other terms, *marked/unmarked*, are

only applied to syntax patterns as standard or expected, (e.g. subject-verb-object) as opposed to *marked*, that is, «in contrast with the normal pattern» (TAYLOR 2007: 323). However, early on in the book, i.e. chapter 1, while addressing the theme/rheme pattern in English and in Italian, TAYLOR seems to deviate from clear cut distinctions by associating *markedness* to register as much as to clause and information structure: he offers an example of translation IT>EN stating that «a more spontaneous (**unmarked**) English translation, with the more colloquial verb *chipped in* justified by the informal nature of the discourse» (2007: 16 – bold and italics in the original). What follows is a translation in English of the previously mentioned Italian sentence<sup>9</sup> but since no further co-text or context is offered, the reader is uncertain about what *unmarked* should refer to and whether there is any trait/aspect/feature or priority to be detected whenever *markedness* is identified. Eventually, TAYLOR (2007) openly remarks the importance of understanding *markedness* as a term in translation theory and practice, as it requires «special attention on the part of the translator precisely because there may be valid syntactic, semantic or stylistic reasons» (2007: 18), to evaluate while completing a translation task. Unfortunately, not enough effort is made to offer a consistent and, at least, partially complete picture of the term.

To conclude the review of the coursebooks, in MUNDAY (2016) the word *markedness* can be isolated both in the contents, within the title of a subsection in chapter 4, «Option, markedness and stylistics shifts in translation» (MUNDAY 2016: 98), and in the index. The other variants, for example *marker* as in TAYLOR (2007), is not used by MUNDAY and *marked/unmarked* are not treated as terms (no bold type or colour-coding used). Few occurrences of the word *marked* are meant as general words meaning "characterised by" as in «marked by increased linguistic competence» (MUNDAY 2016: 34), or meant as in «marked an important step forward in translation theory» (MUNDAY 2016: 42), or as a phrasal verb, «the path *marked out* by Baker» (MUNDAY 2016: 294). Interestingly, *markedness* is discussed as a term within a focus on *stylistic shifts* and is defined as follows: «a choice or patterns of choices that stand out as unusual and may come to the reader's attention» (MUNDAY 2016: 99). MUNDAY does not elaborate much on this rather vague idea, but simply offers an example from a promotional, just one line, in which adjectives are

fronted: «Challenging it is. Boring it isn't». As a comment, he points to the fact that beyond structures, it is the linguistic function or intention enacted by *markedness* that should be paid attention to and as an addition he issues a warning on equivalence relative to *markedness* between ST and TT but then does not develop the point: «In translation, it may usually be expected that a marked item in the ST would be translated by a similarly marked item in the TT but this is not always so» (MUNDAY 2016: 99). Indeed as shown by BAKER (2011) in her example, *markedness* should always be investigated at all linguistic levels of analysis, be it grammar category (e.g. gender at word level) or word order and syntax, what is perceived as expected and standard in one language and culture may not be as expected and *unmarked* in a target culture and language. In a final, generic statement, within the same chapter, MUNDAY (2016) argues that translation as a product is often carrying a reduced level of *markedness* and that there is an increasing number of scholars who have been investigating the issue, e.g. KENNY (2001), TIRKKONEN-CONDIT (2004). Others, on the opposite end, have targeted the work of those translators who create *markedness* in translation as output to make their work visible, distinctive or exotictic – e.g. SALDANHA (2011) and MUNDAY's own work on Harriet de Onís' translation patterns (2008).

## 7. Conclusions

The aim of the present research was to show how lexical items such as *shift* and *markedness* (*marked/unmarked*) do have a recognised terminology status across different approaches and theories in Translation Studies, but still lack full and consistent recognition. As a matter of fact, their polysemy is seldom tackled and scholars tend to use the words in both their general and more specific sense or subset of senses, which results in overlappings and inappropriate use that causes uncertainty and reduces their specificity. Both perceived at least as having a strong connotation, *shift* and *markedness* are often deprived of their specialised content and used in a pseudo-technical way or are inconsistently adopted so that their general sense intervenes abruptly alongside a narrower and more discipline specific one – almost as if they were homonyms.

As discussed, *shift* a general English word turned into term has gained currency in many theory-specific compounds and established specific

references within a variety of translation theories, from those still strongly tied to Linguistics (CATFORD 1965) to those more concerned with style (POPOVIČ 1970) up to polysystem theories (TOURY 1978/1995/2000) as well as those dealing with issues of coherence and cohesion (BLUM-KULKA 1986/2000). Scarcely featuring in the discipline reference materials, such as translation dictionaries and encyclopaedias, *markedness* is a borrowing from phonology and more broadly from Linguistics where it has been employed in a number of different branches and become popular in a number of theories – i.e. JAKOBSON's structuralism (1959/2000), CHOMSKY's generative grammar (1965), Optimal Theory (PRINCE & SMOLENSKY 1993), first and second language acquisition, etc. Frequently used as «an almost theory-neutral everyday term in linguistics» (HASPELMATH 2006: 27) and often absent from reference books in Translation Studies, *markedness* and its variants *marked/unmarked* feature in BAKER (2011), MUNDAY (2016) and, partly, in TAYLOR (2007) who have included the term and its more technical sense(s) in their coursebooks. Yet its status within Translation Studies is still uncertain and its formal strength would require more consistent treatment also within dictionaries, encyclopaedias, and other handbooks, coursebooks and manuals paratexts, e.g. index, glossary, foot- or endnotes.

If polysemy, homonymy and synonymy are to be meant as opportunities within reference tools addressing primarily learners – i.e. dictionaries, encyclopedias, coursebooks and manuals – they should enhance critical thinking and an open-minded approach to Translation Studies. Hence, a coherent handling of how terms are presented, signalled, and made retrievable via paratextual tools and/or any other typo-graphic solution – e.g. colour -coding or use of bold type – is not only expected but desirable. A rich and coherent presentation of terms along with appropriate redefinition of theory-specific sense(s) could continue to inspire and enrich a lively debate and maybe even open new perspectives. Definition of terms should always be clear and accessible, any approach, methodology and scholar working on such terms should be presented, discussed and offered reference to for further reading or subjected to a compare and contrast analysis. Equally desirable would be to reduce inefficient repetitions by making best use of paratexts – i.e. list of contents, footnotes, glossary, index, etc. – and by avoiding overlapping of meanings that may hinder understanding and

intelligibility. Comparing and contrasting terms within approaches and theories from an epistemological, conceptual and intercultural perspective (MARCO 2009) should be regarded as a fertile opportunity as well as an occasion to present new contrastive translation examples that can activate the student's attention and engagement.

As a final remark meant at opening up further work within Translation Studies terminology and metalanguage, another word has come to the foreground, while working on *shift* and *markedness*, that has currency in Translation Studies and has shown an alternate fortune as term. This is *correspondence*. Often misused or reduced in its scope as a synonym of *equivalence* or a weaker version of it (HERMANS 1991), it is worth noting, for instance, how *correspondence* is employed in a number of different compounds that bends the original general meaning of the word into a more technical and specific sense(s) within different theories, such as NIDA's *structural* and *dynamic correspondence* (1964/2000); TURK (1990) who understands *correspondence* as one of two criteria behind the equivalence established by the translator's choices; or HOLMES who discusses hierarchy of *correspondence* and distinguishes three types, that is, homologues, analogues and sematologues or semasiologues (1988). By the way, as early as in the 1960s, CATFORD already spoke about the difference between *formal correspondence* and textual equivalence, whereas KOLLER (1979/1992) used the word mostly in an attempt to distinguish and clarify the meaning of *equivalence* and considered *correspondence* more apt for contrastive Linguistics.

As MARCO (2009) argues, the problem with terminology or metalanguage in Translation Studies has to do with how terms are used «in a non-standardized, even chaotic way, the most frequent result being that there is no one-to-one (i.e. univocal) relationship between term and concept» (MARCO 2009: 76) and in addition scholars are also met with «intercultural problems» stemming from different theoretical national traditions and specific language pairs. However, where MARCO spots the current weaknesses, the opposite side of the coin could be considered as an inspiration to work more on offering clear definitions of terms to reduce that scenario whereby «conceptual similarities are obscured by terminological differences» (MARCO 2009: 76) and equally avoid that «conceptual differences are hidden beneath apparent synonymy» (MARCO 2009: 76). Or

at least an attempt in this direction could be conceived as strategic for the discipline and beneficial for communication among specialists and within trainees' programs.

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## Note

↑ 1 Italics is used throughout the paper to highlight the two discussed terms, i.e. *shift* and *markedness*. Inverted commas and italics may feature within quotations as originally presented by authors.

↑ 2 All definitions and word senses are from the online *Cambridge English Dictionary* <https://dictionary.cambridge.org/dictionary/english/> (last accessed 16/05/2020).

↑ 3 There are several other compounds using *shift* listed in dictionaries, e.g. "shift work", "split shift", "swing shift"; within computer language, another common compound is "shift key", i.e. «a key on the keyboard that you press together with a letter key to produce a capital letter» (*Cambridge Dictionary, sub voce*). In general English, "paradigm shift" is «a time when the usual and accepted way of doing or thinking about something changes completely» (*Cambridge Dictionary, sub voce*); and one that is typical of American English "stick shift" that is "gear stick" in BrE (*MacMillan Dictionary, online version* - last accessed 10/05/2020). Finally, according to the *Oxford English Dictionary (online version* - last accessed 10/05/2020), *shift* largely occurs in astronomy as a term, i.e. "spectral shift" and "redshift" that is «the displacement of spectral lines».

↑ 4 The asterisk is in the original passage and highlights the only compound in the list that is not within CATFORD's theory. "Negative shift" was coined by POPOVIČ.

↑ 5 SHUTTLEWORTH offers clear guidelines relative to the way terms should be identified throughout his volume: «Any headwords which could profitably be read in conjunction with a particular entry are indicated in small capitals, either in the body of the entry or in the "see also" section at the end» (SHUTTLEWORTH & COWIE 2014: xiv). But he also points out that «to avoid littering the text with large amounts of extra formatting, a headword is generally given in small capitals only the first time it is mentioned in any particular entry» (SHUTTLEWORTH & COWIE 2014: xiv).

↑ 6 Here is a list of other terms (and page numbers) the word *shift* is associated with in the index: categorial 228, 229; constitutive and individual 229-30; definition and classification 226-7, 229-31; generic 230; intrasystem 229; invariance 227-9; level 229; modulation, modification and mutation 231; obligatory and optional 228; texteme 231; textual equivalence 229; transemes and architransemes 230-1; unit and class 229.

↑ 7 Just to offer another example, taken from an academic paper, but still focused on BLUM-KULKA's use of the word *shift*, let us consider a study by Miriam SHLESINGER (2014). SHLESINGER starts from BLUM-KULKA's approach to discuss empirical data collected from samples of interpreting and in her abstract reliably uses the term *shift* arguing what follows, «[t]his study examines shifts of cohesion which occur in simultaneous interpreting, using data drawn from an eleven-minute piece of spontaneous discourse as rendered by thirteen student interpreters. Preliminary findings suggest that shifts do occur in all types of cohesive devices».

↑ 8 Together with MORAVCSIK and WIRTH, in 1986, ECKMAN edited the volume *Markedness* (Springer Science & Business Media) which collects the proceedings of the «Twelfth Annual Linguistics Symposium of the University of Wisconsin-Milwaukee» held on March 11-12, 1983. The book is organised in 4 main sections each covering markedness within a specific area of Linguistics, i.e. Phonology, Syntax, First Language Acquisition (LAPOINTE, MENN, SOLAN) and Second Language Acquisition (BENSON, FELLBAUM, WHITE). Among the featuring scholars CAIRNS points out that markedness values «may differ whether one consider perception or production» (1986: 9) while COMRIE's claim is broader in scope as he argues that «unmarked forms express expected meanings and marked forms stand for less expected meanings» (1986: 9), where expected vs. non expected is related to what is standard and more natural thus implying «an applicability beyond language» (1986: 9) .

↑ 9 The sentence in Italian is «Jack ha pagato il conto, e siccome era molto caro, ha contribuito anche Mary». What is at odds in TAYLOR (2007) reasoning is that the Italian verb *contribuire* cannot be regarded as informal or colloquial, rather the opposite. A less formal lexical choice would have been a periphrastic structure such as *metterci qualcosa* and the sentence would have been “ci ha messo qualcosa anche Mary”, definitely closer in register to the phrasal verb of the ST *chipped in*.