

Translation style guides in translator training: Considerations for task design

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ABSTRACT

Style guides (style sheets or stylebooks) can constitute a key heuristic tool and pedagogical scaffolding in translator training environments in that they require the negotiation of situated meaning with multiple stakeholders, potentially across multiple tasks and cohorts of trainees. By their nature, they refer to precedent, other texts that condition the text at hand; in this sense they are a special kind of ever-evolving translation reference, paratext, and at times even a quasi-brief. The style guide is put forth as a contradictory, hybrid genre of the descriptive and prescriptive, preferred and mandated, and is yet an unscientific, though integral, part of quality control and quality assurance in many key translation domains and even of equal access to services in others (e.g. health care). The intersection of style guides with norms will be considered, and templates for style guide management tasks and variations—including analysing, updating, editing, and creating—will be proposed as part of the trainer’s repertoire for building and integrating various subcompetences. Further research areas for translation pedagogy, including issues related to liability and compliance, are suggested.

KEYWORDS

Translation style guides, standardisation, situatedness, norms, competence models

1. Theoretical rationale for teaching style guides

Style guides have been largely absent from the literature on the translation classroom. Rather than establishing criteria for ‘right’ and ‘wrong,’ the style guide shows translation as a negotiation in a task environment in which norms, the needs and preferences of multiple stakeholders, and discrepancies exist and evolve. They are resources that take end-users into account, balancing linguistic correctness with communicative functionality. The style guide provides opportunities for higher-order thinking skills such as creating, comparing, analysing and evaluating. Significantly, too, style guides make operational the intertextual linkages not only translation-to-resources, but translation-to-translation. This cohesion, this context, are often lost in training situations in which a given translation situation typically may last 1-2 weeks and never again be recovered by the student. In this paper, I propose to examine translation style guides as a norm-governed tool, but also as a hybrid genre, and in typologising it further point to its multiple purposes. I will lay out what can be active learning activities and tasks related to *style guide management*.

At bottom, the ability to work with style guides forms part of *instrumental competence* (González and Wagenaar 2002), especially information management skills (retrieving, organising and analysing information from multiple sources), as well as *systemic competence*, which includes research skills and project design and management. Under Cao's (1996) model, *style guide management*, as we will term this subcompetence, qualifies as an *organisational competence* component, embracing both grammatical and textual competences. Under yet another competence model, for example, Canale (1983), style guides particularly reflect *sociolinguistic competence* (norms of utterances in context) and *strategic competence* (repair of SL>TL communication breakdown).¹

We may theorise the translation style guide as a translation heuristic for the representation and proceduralisation of knowledge for a potential set of interrelated text productions and evaluations. For the end-user, the utility of translation style guides may be plotted along at least two axes: standardisation, with its attendant issues surrounding the evaluation of translations, and end-user comprehension (by extension, access to services). As Hablamos Juntos, a language policy and health care advisory group, explains:

The absence of a translation style guide with a standardised glossary for working in the health care industry creates inconsistency in the translations of basic health terminology and concepts and contributes to disagreements over possible errors in translations. It also increases the comprehension difficulty for readers. Adopting standardised glossaries of commonly-used words or phrases can help avoid these difficulties. Translation style guides can be simple one-page documents with general rules about tone and guidance for approaching proper names, products or functions that may not translate well (Google, n.d.), or more detailed documents that incorporate spelling rules, sample of common standard text, conventions for translating official names, recommended formats for numbers and measures and so on (European Commission, 2008; International Bank, 2004). Consistent and uniform translations of common health care system vocabulary can also make it easier for LEP populations to recognise and learn health care terms and concepts (Hablamos Juntos).

1.1 Defining the style guide and criteria for style guide construction

It is especially apropos in training environments to teach style guide construction in that this resource is not ready-made, and often depends on the translation suppliers to produce. In cases where they exist, style sheets may stand in lieu of a non-existent translation brief

or in support of a scant one; style sheets may not only provide a foundation for negotiating a missing brief before a translation assignment, but also for protecting the translator after the fact. A succinct feature analysis may be in order:

A translation style guide is neither a dictionary nor a grammar resource. It is a reference guide in which standards for regulatory compliance and culturally appropriate translations are set. [Its purpose] is to harmonize standards and to assure consistency from document to document (Foreign Exchange Translations).

Byrne (forthcoming 167) rightly notes that the most logical translation choice is not always the one called for.² Thus style guides can create in the student an awareness-raising function with respect to situatedness, or translation in situation (in the terminology of Vienne 1994 and Risku 2002). The translation style guide, in other words, provides a structure, a set of reference points that goes beyond linguistic correctness to usability.³

Rules, properly speaking, are also a common feature, however, as are entries for common errors. From a pedagogical perspective, the latter constitutes a special kind of formative feedback: support for local (and to a lesser extent, global) error prevention. Note how the prescriptive commingles with the descriptive:

Translation style guides advance consistency in writing and provide guidance on language use. Such manuals can specify writing style details such as punctuation, capitalization, spelling, word usage, grammatical conventions and formatting issues. The translation style guide for the European Commission provides translators with key translating rules, including not only the basic grammar of every language but also the most common errors that can occur when translating from one specific language to another (Hablamos Juntos).

Obligatory and optional translation choices—borrowing here from the paradigm used in discussing translation strategies or techniques—coexist in translation style guides, and many are even written this way by design. In the European service standard, EN 15038: 2006, for instance, a style guide can include “instructions or choices” (15). Clearly we are in the realm of norms:

Operational norms... may be conceived of as directing the decisions made during the act of translation itself. They affect the matrix of the text—i.e., the modes of distributing linguistic material in it—as well as the textual make-up and verbal formulation as such. They thus govern—directly or indirectly—the relationships as well that would obtain between the target and source texts; i.e., what is more likely to remain invariant under transformation and what will change (Toury 1995:58).

Where a consideration of norms can most assist the student of translation style guides would appear to be in mapping Toury's *basic (primary) norms, secondary norms (tendencies), and tolerated behavior*. The prohibitions against, and adverse consequences entailed, by serial comma use (secondary norm) will be quite different from the inconsistent use of primary norms such as a company slogan, ad copy style, or terminological consistency. In §19.18 of the European Commission Directorate-General for Translation English Style Guide we find, for example, "Act vs. law' Either is acceptable in translations, provided you are consistent (bearing in mind §19.15)" (80); §19.15 in turn reads: "For countries that produce their legislation in English and others that systematically provide translations into English, you should use the terms they use" (79). Such concatenating norms, their preemptions and discretionary provisions, become complicated—does "consistent" refer here to multiple texts? And what if—ethically—the official translations provided are flawed? These distinctions are fundamental in translator training and education, though they are often indiscriminately distributed in translation style guides.

The style guide, from one perspective, has much in common with the pedagogical practice of scaffolding in that it constitutes at once a learning guide, expert modeling, and a translation resource. It is useful, in sum, to consider its text type one of hybridisation, a fact owing in part to its multiple simultaneous functions and audiences. Moreover, we can posit that the style guide is by its nature an unfinished, imperfect text, thus inviting pedagogical interventions.

1.2 Typology

For digital texts and localisation, Jiménez-Crespo (2010) identifies four categories: "(1) style guides for specific localization types, such as those that apply to web localization software, (2) language-specific style guides, (3) usability style guides, and 4) company and project-specific style guides." These, then, can be classed even more broadly as proprietary and non-proprietary.

Zabalbeascoa (1996:250, in Díaz Cintas and Remael 2007:79) in passing describes one conceivable iteration of the style guide for audiovisual (AV) translation that appears to include training cases, and significantly for the translation classroom, invokes norms:

An essential part of the translator's reference material should be a specialized in-house *stylebook*, which could include all the information that the employer or firm can anticipate that the translator will need to know and use, including glossaries, television policies and translational norms [...] along with a considerable number of practical examples of problems and strategies.

What is particularly intriguing about this model is that it includes heuristics, production rules, rather than merely serving as a compendium of prescriptive usage notes.

2. Practice

2.1 Pre-task questions

A sample of pre-task questions that can be used in class follows:

1. Peruse a few translation style guides online (Microsoft, Google, EC). How would you describe the tone, in general? Is the imperative used?
 - a. What does their language-specificity add that a general translation style guide could not? Give classes of examples.
 - b. (Research) Peruse John R. Kohl's *The Global English Style Guide* (2008). What do the translation style guides, taken together with Kohl's book, suggest to you about *writing for translation* and improving translatability in general?
2. In what way do you think style guides assist in creating and following best practices? Why does brand consistency matter?
3. When in the translation process chain do you think style guides ideally should be constructed?
4. Who constructs them?
5. Is their authority binding? Do you think translators or reviewers (others?) should be responsible for conforming a text to the guide?
6. Identify pragmatic strategies in three different style guides. For example, some propose the use of an international or "neutral" product terminology. Sun Microsystems (Spanish version, 20), for example, calls for the use of "PC" instead of the multiple regional terms for "computer" in Spanish. After sharing your examples, discuss and critique the logic of these proposed strategies.
7. What do you think the client's role in constructing translation style guides should be? Imagine you're a translation vendor who wishes to

construct a style guide for a translation team to follow in subsequent work. Devise a scenario, or an electronic method of collaboration that would incorporate and simulate this contribution efficiently for the style guide construction or updating process.

8. After considering style guides in some detail, now define 'style,' as used in this sense, in your own words.

2.2 Task models

Let us consider the following translation style guide tasks and variations, graded in difficulty according to demand on the learner (analyse > debate > update > edit > use > create > test):

a. Analyse

Models and variations:

- Students determine by induction the organising principles of an existing style guide.
- Students instantiate principles as manifested in different translation situations (e.g. translating topographical names and translating titles of address, within or across a style guide document).
- Students compare a style guide with a translation style guide, charting differences.
- Students typologise and instantiate translation style guides, creating a library including metadata.
- Students present style guides to peer groups, asking questions of one another.
- Students assess whether and to what degree a translator has followed a given guide on a given text (i.e., to what extent the resource is *descriptive*, as opposed to *prescriptive*).
- Students define 'culturally appropriate' from the style guide entries.
- Students determine the degree of gender neutrality or other determiner of politically correct discourse in a guide.
- Students compare and contrast guides across companies, domains, or agencies, forming hypotheses to account for their differences.
- Students determine which binding in-house translation rules (e.g. Microsoft Style Guide) might be applicable across the market.

b. Debate

- As an introduction to style guides in editorial translation situations, students survey a list of publishing environments (academic book series, textbooks, sacred text concordances online, etc.) and, in consensus, devise editorial policy for translation-related matters, for example the translation or non-translation of block quotes in a foreign language; they also might find evidence for how translations are displayed vis-à-vis the source text (footnotes, consecutive, facing page) and make recommendations.

c. Update

- Students use a style guide created by a previous class and update it according to given parameters.
- Students add a dimension to an existing style guide (e.g. a bibliography of useful glossaries; a flowchart of the TT editing/revision process)
- Students are given an interinstitutional style guide for organisations that have a new member country; country-specific linguistic usage notes then have to be harmonised with the existing guide.

Note: Updating is ideal for novices, as the existing style guide serves as a completion problem (incomplete input for the student to complete), reducing cognitive load. The difficulty of this task can be manipulated by the way the updated input is presented, and whether the student has to separate new content before entering it in an updated guide.

d. Edit

- Students conjecture what might need editing from a guide with flawed (e.g. legally incompliant) entries presented as input, then students are given a corpus of corresponding TTs.
- Variation: One team translates, another conforms the target to a style guide provided post facto.
- Variation 2: Students make a compilation of common errors from a learner corpus of previous classes' translations.
- Variation 3: Students can edit previous classes' translations, and produce from it a style guide.
- Variation 4: (Role-play) A translation commissioner and a vendor have a disagreement over the use of a term; they debate

ambiguous entries' applicability to their specific translation assignment, and they seek a compromise. Students act as consultants; another student group votes.

e. Use

- Students are given an ST and must conform their translation post-facto to style guide specifications provided, including reformatting.
- Variation: Students harmonise a map with a text based on the precepts for translating geographical names [see Appendix 1].
- Variation (2): Students are given mini-cases (see the gap activities in "Case Study: World Bank Translation Guide" below [Appendix 2]).
- Variation (3): Students are given the following guideline from Reuter's news agency, and are tasked with finding the original quotes in news stories (provided) for translations to appear on an international newswire:

When translating quotes from one language into another, we should do so in an idiomatic way rather than with pedantic literalness. Care must be taken to ensure that the tone of the translation is equivalent to the tone of the original. Beware of translating quotes in newspaper pickups back into the original language of the source. If a French politician gives an interview to an American newspaper, it is almost certain that the translation back into French will be wrong and in some cases the quote could be very different. In such cases, the fewer quotes and the more reported speech, the better. (Reuters *Handbook* in Bielsa and Bassnett 2009:71)

f. Create

- Students must induce criteria for the particular problem situation, then build a guide (project-length task).
- Variation: The same task, though in large teams, in a wiki environment; comment is invited from outside users.
- Variation (2): Students perform the task in a jigsaw format (a note-taker from each 'expert' group hears the principles guiding construction of an aspect of the guide [style, technology, common errors, etc.], and in turn trains his or her respective group; or note-takers in rotation try to determine all the principles [common error types, standardisation solutions, etc.] the different groups have found); alternatively, teams could work on one of the four categories identified by Jiménez-Crespo above.
- Variation (3): Students create an annotated style guide, which for pedagogical purposes could be a style guide reduced in entries

but expanded by students with a column or special coding to indicate entry type or rationale for including [e.g. country standards or compliance; company preference; usability; etc.].

- Variation (4): (Part-task training) Students isolate from a source text only those terms that could potentially cause cultural misunderstandings; a style guide is created for those terms, with potential solution strategies and links to parallel texts (both translations and STs featuring the terms or phrases in question).
- Task extension: Groups translate a text using their own or another team's guide.
- Variation (5): (Part-task training) Students localise a product from one regional language variety to another, documenting taboo words and regional preferences.
- Variation (6): Students compare ST and TT corpora, extract sample translation solutions, vote on the most effective, compile a "strategic style guide."
- Variation (7): Students create a bidirectional style guide with hypertextualised links (source and target are reversible, though particular problems for each direction are represented). Each direction can be developed by separate teams, which then meet to harmonise. Another feature could show contrastive analysis of the languages in the pair for this project domain.
- Variation (8): Students use online reference corpora for style guide construction (e.g. Europarl/linguee.es); they create an ad hoc corpus first, then the corresponding style guide.
- Variation (9): Students imagine they are on a television production studio team (3-4 members); they must develop a brief "Guidelines for Translators" that takes into account oral register, then find examples in the literature on audiovisual translation illustrating the strategies of translating written text for oral performance.⁴
- Variation (10) (role-play): In paired teams of 2-3, students represent a company and a translation service provider meeting to develop guidelines for localising assets. The company's products are distributed to both teams, which later meet to negotiate ground rules for tone, translation of names, legal phrases, and whatever else is deemed germane for translation into a given target culture (students can draft questions for the other party). The style guide team may, for example, present term candidates or potential problem points for the agency to weigh in on.

g. Test

(Empirical research): Students do a readability test on their target market after implementing the guide. The guide itself can be tested, or the materials made based on it.

Conclusion

The style guide is underutilised as a teaching tool in the translation classroom, in tandem with the fact it is both undertheorised and understudied as an empirical artifact and as a tool of the trade. Much work remains to be done in Translation Studies on this resource: style guides and legal liability, descriptive and comparative studies (of compliance, design), their (semi-)automation, cross-cultural ideological shifts, creativity, authority, translation style guides for promotional texts, and many other areas. A multi-author, hybrid text that is built for multifunctionality, the translation style guide is a paratext relying on both preceding texts and 'seeding' the texts to follow, one that is also a rich source of pedagogical engagement between authors, developers, end-users, translators, revisers, and project managers. It is, perhaps no less than the translation proper, a site both to bring translational incongruities into awareness and to work through them both systematically and concertedly.

Appendix 1 (from the Canadian Translation Bureau)

The Canadian Style. Background

On November 23, 1983, the Treasury Board issued its Circular No. 1983-58 to implement the policy adopted by the Canadian Permanent Committee on Geographical Names (CPCGN) regarding the linguistic treatment of geographical names on federal maps and in federal documents.

The principles enunciated in the policy are as follows:

- The official form of a geographical name is the one adopted by the provincial or federal authorities in whose jurisdiction an entity lies. This name can be found in the *Gazetteer of Canada*.
- Certain geographical names of pan-Canadian significance (see list at the end of this chapter) have well-known, official forms in both English and French. Both forms may be used on maps and in documents.
- All other geographical names have only one official form, which is

the one to be used on federal maps in either official language.

- In documents, it is permissible to translate the generic portion of names of geographical features, that is, the portion that indicates the nature of the entity (*Lake* in "Arrow Lake"), but not the specific portion that names the entity (*Arrow* in "Arrow Lake").
- Names of inhabited places retain their official form in both English and French texts, e.g. *Montréal* (Que.), *Saint John* (N.B.), and *St. John's* (N.L.)

The Treasury Board also designated the Translation Bureau as the organization responsible for determining what, in running text, should be the proper form of the names of geographical features in the other language.

In 1989 a committee made up of Translation Bureau and CPCGN representatives was assigned the task of examining the various problems encountered in translating official English names of Canadian geographical features into French and devising solutions. The committee produced the "General Rules for Translating and Writing the Names of Canadian Geographical Features," (Gélinas-Surprenant 1990), the purpose of which was to standardize the translation and writing of geographical feature names within a sentence (rather than on a map). Although the rules were written for the translation of English names into French, the committee did recommend that, where applicable, they also be followed for the translation of French names into English.

Appendix 2 (from Washbourne 2009)

Style Sheets and Style Guides

Style sheets and style guides are used in agencies, international organizations and publishing houses.

Task: Research several examples of these important documents and answer the following questions:

1. What are style sheets used for in this industry? Who develops them? Who uses them? Are they the same across languages?
2. What might a style sheet include? List at least 10 important features.
3. Does a style guide prescribe *specific* choices, when several obvious ones exist?

4. What published style guides (e.g., *APA*, *Chicago Manual of Style*) take precedence in journal and book publishing and in what respective fields?
5. Is “writing for translation” a category in any style guides that you can find? What domains does this writing technique seem to most concern?

Optional (research): Find out where *writing for translation* is being done, what it is exactly, who is doing it, and why. Check in your library’s electronic databases as well.

Case study: World Bank Translation Style Guide

Go to: siteresources.worldbank.org/TRANSLATIONSERVICESEXT/Resources/Translation_Style_Guide_English.pdf and answer the following:

- a. What does the disclaimer on World Bank documents say about which document is in force if there is an inconsistency between the English and the translation?
- b. For Press Releases, what does the “Embargoed” header mean?
- c. Can footnote references go in the middle of a sentence?

Now substitute the word “Spanish” in the Web address, download the file, and answer the following:

- a. Should translated letters beginning “Dear Governor” read “Estimado Gobernador:”?
- b. Should the report entitled *Las condiciones para la inversión y el Grupo del Banco Mundial* appear in all capitals?
- c. Does the guide distinguish between *siglas* and acronyms, or are they the same?
- d. What’s the difference between *1.000 millones* and *un billón*? (Note: very important for a translator)
Is it still all right to use *países en vías de desarrollo* as a polite term for “developing countries?”

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¹ Many scholars (e.g. Cao 1996)—in contrast to the usage here—employ the term *strategic competence* as a macro-competence comprising transfer subcompetences.

² Bartrina and Espasa (2005:87-88) describe the tensions of the audiovisual translator caught between using “credible”—verisimilar—language and the “normative”—restricted, standard—language laid out in TV stylebooks. The stylebook to which they allude recommends “*both* standard language *and* register variation” (ibid 88), revealing that even in some of these codifying resources, the line between preference and rule, or description and prescription, is not always indelible or impermeable.

³ In the European General-Directorate for translation, for example, note that we find (subsection 11.9 p. 53) the guideline for translating foreign names. If these are familiar to the intended readership or used in English-language texts, the ST name should be used rather than an ad hoc name in brackets. English-language texts can be searched, but judging what will be familiar to a reader is notoriously too elusive to be governed by an immutable rule.

⁴ This variation can also work with *dubbing bibles* (Chaume 155, forthcoming), which the author describes as containing “information on the series, voice casting guidelines, character descriptions, title, logo and episode titles and some translation guidelines.”