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Beyond Equivalence: Reconsidering the Relationship Between Linguistic and Functional Approaches in Translation Studies

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Abstract: This article intends to trace the theoretical shift from linguistic to functional approaches to translation with a view to highlight their theoretical merits and practical adaptability to produce adequate and natural target languages. While the linguistic approach seeks to achieve a structural faithfulness to the source language, the functional model prioritises the purpose, audience, and function of translation within its target context. In this study, despite the chronological presentation of the two approaches in the translation studies literature, which may give the impression of a theoretical progression or substitution, the two approaches are presented as complementary frameworks for providing quality translation process and product.. The study builds on how the two approaches address meaning, context, and translator decision-making, demonstrating that equivalence, text type, communicative function, cultural context, target audience, and ethical constraints are key factors that determine the relevance of each approach across different translation contexts.

Keywords: Translation theory, Linguistic approach, Functional approach, equivalence, skopos, text type, loyalty.

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I- Introduction

Translation studies have developed through the emergence of foundational theoretical approaches to translation. These approaches have paved the way for strong debates and controversies ever since early theories and figures such as Cicero, Horace, and St. Jerome's word-for-word and sense-for-sense models of translation. In this article, the attempt is to understand how earlier linguistic approaches to translation operate building on the works of Roman Jakobson (1959), J.C. Catford (1965), and Eugine Nida (1964), alongside subsequent functionalist approaches namely; Katharina Reiss's text typology (1971), Hans Vermeer's Skopos theory (1978), and Christiane Nord's functionalist model of translation (1997).

For linguistic approaches, translation quality is determined by similarity and correspondence to the original at the level of form and structure over content. In this sense, the concept of equivalence was introduced with a view to achieve structural parallelism between source and target languages. Translation was then regarded as an interlingual process aiming to reproduce faithfully the source text's grammar, syntax, and meaning. Although this orientation served as a practically relevant translation approach in particular technical, scientific, and standardized translational situations, it demonstrated an evident deficiency in navigating contextual clues, cultural paradigms and pragmatic features which required the emergence of functional approaches that integrated all textual components of the translation process.

The late twentieth century has witnessed a shift from equivalence-based translation to a more influential functional approach that paid special attention to the target language and audience over strict adherence to the source language form. This purpose-driven approach emphasized the function of translation within specific communicative situations moving from mere linguistic transfer to incorporate the communicative function of the target language, the expectations of the target audience, and the translator's role as an active decision-maker. Therefore, translation studies has known a significant development given the new dimensions

presented by this approach in navigating meaning, culture, and context during the translation process.

Although the linguistic orientation was subject to strong scholarly criticism for its outdated mechanical nature and oversimplification of contextual elements of translation, it demonstrated its relevance in specialized translations where terminological precision and structural fidelity is indispensable. This article argues that the seemingly contradictory perspectives of both linguistic and functional models are in fact regarded as complementary approaches considering that each one addresses various translation processes and engage with different translational needs. It offers an examination of the two approaches by analysing their underlying assumptions, their definitions of meaning and equivalence, and the role of the translator with a view to provide an understanding of the two approaches as complementary rather than oppositional. It finally intends to highlight that the two approaches are context-dependent perspectives with each one addressing specific translation situations aiming to provide appropriate translation products.

II- Conceptual Foundations of Linguistic Approaches to Translation

1. Overview

Early linguistic theories of translation emerged after centuries of debate around literal versus free translation and at a time when translation was no longer regarded as a skill or art but as a process that can be scientifically and objectively described. Structural linguistics has also had its impact on the translation theory maintaining that language is a systematic network of signs that must be precisely transmitted across languages during the translation process (Munday, 2016). The linguistic approach to translation introduced three key issues that should be taken into account while translating, which are meaning, equivalence, and shifts, developed by prominent leading figures who will be presented in details in this subsequent section.

2. Roman Jakobson: Interlingual Translation and Meaning Transfer

In his 1959 seminal work "On Linguistic aspects of translation", Roman Jakobson (1896-1982) presented the earliest linguistically-based framework of his translation approach. He distinguished between intralingual, interlingual, and intersemiotic types of translation. For him, intralingual translation is a form of rewording within the same language, interlingual translation is 'translation proper' or the transmission of meaning from one language into another, while intersemiotic translation refers to the interpretation of verbal signs by means of non-verbal signs (Munday, 2016).

According to Jakobson (1959), the translation process between two different languages (interlingual translation) is an act of linguistic interpretation between two linguistic structures and systems. For him, translation in this sense is a process of reformulating a verbal sign in the source language via a different verbal sign in the target language, maintaining that *"such a translation is a reported speech; the translator recodes and transmits a message received from another source. Thus, translation involves two equivalent messages in two different codes"*(p.233). In what concerns the concept of equivalence, Jakobson argues that full equivalence between languages is impossible since each language articulates its meaning according to its unique grammatical and semantic categories. Therefore, equivalence is achieved through the interpretation of the source language's verbal signs and not necessarily via reproducing the same linguistic form of the original.

Hence, Jakobson's theory confirms that translation is primarily a linguistic activity, where the analysis and transfer of meaning depend on the structures and conventions of language itself.

3. J. C. Catford: Formal Correspondence and Translation Shifts

The British linguist J. C. Catford (1917–2009) identified translation as *"a process of substituting a text in one language for a text in another"*(Catford, 1965, p. 1). This definition

sets Catford as one of the primary representatives of linguistic orientation in translation studies, given that he views translation as an operation performed on language. His model of translation theory presented two important conceptualizations for equivalence which he named formal correspondence and textual equivalence. For Catford, a formal correspondent refers to any TL category which occupies the same place in the TL as the SL category occupies in the SL, whereas a textual equivalent is any text or portion of text that is observed to be the equivalent of a given source text (Catford, 1965).

According to Catford, translation shifts are *"departures from formal correspondence"* during the process of going from SL to TL owing to the systematic differences between languages. For him, there are two types of shifts; level shift and category shift. While level shift is when a grammatical category in the SL is translated by means of a lexical item in the TL, category shifts are divided into four types; class shift (change of part of speech), unit or rank shift (from a word into a phrase, a phrase into a sentence, a sentence into a word), structure shifts (change of structure from passive into active, interrogative into affirmative), and intra-system shifts (a shift that serves meaning, ex: from singular to plural, countable to uncountable or vice versa) (Munday, 2016).

Overall, Catford's approach is a linguistically-based model of translation that shows an excellent capacity to account for the structural mismatches between languages. However, this focus on the linguistic levels of language demonstrates an inability to cope with the contextual, pragmatic, cultural, and communicative dimensions of languages, highlighting the main critiques and limitations directed to the linguistic approaches of translation.

4. Eugene Nida: Equivalence and the Linguistic Basis of Meaning

According to Munday (2016), Nida's translation theory developed through his engagement in bible translation in 1940s which also resulted in two important contributions in the field of translation studies, namely; "Toward a Science of Translating" in 1960, and "The

Theory and Practice of Translation" in 1964. Nida's attempt to transform translation into a scientific and systematic process paved the way for incorporating Chomsky's work on Transformative-Generational grammar, which *"provides the translator with a technique for decoding the ST and a procedure for encoding the TT"*(Munday, 2016, p. 63). This approach to translation resulted in a three-stage system of translation; analysis, transfer, and restructuring.

Gao (2023) discusses the development of Nida's translation theory stating that it has gone through three different major stages, the linguistic stage, the middle stage of translation science theory and translation communicative theory, and the later stage of social semiotics. His earlier approach regarded translation as a scientific act whose problems must be analysed from the point of view of linguistics. Nida introduced his first type of equivalence which is "formal equivalence", maintaining that both form and content must match as closely as possible the different elements of the source language. Nida further advocated that translation is a communicative act that requires adopting authentic cultural equivalents which can easily be accepted by readers in the TL. In his final stage, Nida incorporated the contextual and socio-cultural dimensions into his translation approach. By replacing his "dynamic equivalence" with functional equivalence, he emphasized on the translation's effect on the target reader as a central criterion of its contextual accuracy and 'naturalness' (Munday, 2016).

Although Nida's approach to translation is based on linguistic analysis and restructuring of meaning in the target language regarding his concept of 'formal equivalence', his emphasis on 'functional equivalence' and 'equivalent effect' on the target reader moved from formal linguistic equivalence to give priority to functional and communicative aspects of the source language. His approach paved the way for subsequent functional theories which will be presented in the next section.

III- Conceptual Foundations of Functional Approaches to Translation

1. Overview

The emergence of functional approaches came at a time of growing need to shift from predominantly linguistic theories and formal translation to a more functionally and socio-culturally-oriented concept of translation. The equivalence-based linguistic orientation proved to be problematic for its symmetrical view of language and the idea that languages are identical. Therefore, the focus was redirected from source language to target language, taking into account its communicative purpose, audience reception, and sociocultural context. Functionalism, then, draws on foundational concepts presented in text typology, skopos theory, and function plus loyalty principle (Boaheng, 2025).

2. Katharina Reiss: Text Typology and Functional Equivalence

Katharina Reiss is one of the main scholars of the functionalist approach to translation. In her 1970 work, she introduced the concept of text typology and proposed a translation strategy for different text types (Boaheng, 2025). She categorized texts into four main textual functions, including informative text, expressive text, operative text, and audio-medial text, maintaining that the function of the source text determines the translation strategy and the criteria of translation adequacy.

Munday (2016) states that Reiss's work is of ultimate importance as it moved translation beyond the lower linguistic level towards a consideration of the communicative function of translation. Accordingly, equivalence is determined by achieving the same communicative function of the source text by means of the target text, and not at the lexical or grammatical levels (Mahmoud, 2023).

Although Reiss's text typology occupies a transitional position between equivalence-oriented linguistic approaches and later functionalist theories that prioritize the purpose of the target text, it is still insufficient in handling literary texts, particularly because it does not

adequately address linguistic gaps, culture-bound terms, and figures of speech (Mahmoud, 2023).

3. Hans J. Vermeer: Skopos Theory and Translation Purpose

The emergence of Vermeer's Skopos theory in the late 1970s has made a significant contribution to the functionalist approach in translation studies. Considering that Skopos means 'purpose, intent, and function', translation focuses primarily on the function and purpose of the target text in its sociocultural context instead of the linguistic aspects of the source text (Schäffner, 1998). According to Schäffner (1998), this shift was mainly inspired by communicative theory, action theory, linguistics, and literary studies. She maintains that the contextual factors surrounding translation - particularly the culture of the target text readers and the function the target text is expected to perform in that culture - cannot be ignored.

Munday (2016) states that for Vermeer, translation must be functionally adequate in the sense that the translator should be aware of the reason why a ST is to be translated and what the function of the TT will be. He argues that skopos theory is based on five basic rules:

a. The skopos determines the translational action

b. Translation is an offer of information in the TL based on the information offered by the SL.

c. The TT does not offer the same information in a reversible way. (no back translation)

d. The TT must be internally coherent. (acceptable within the TL and culture)

e. The TT must be coherent with the ST. (p.127)

Thus, an adequate translation is the one that fulfils its skopos by means of the commission identified by the translator in order to attain a functionally and communicatively appropriate TT.

Although the skopos theory offers new dimensions of the translation process related to the source text as only "an offer of information", the purpose of translation, the main role of the

translator as a central decision-maker, and the function of translation in the TT context, it has been criticised for overlooking the systematic and linguistic relationships between languages, demonstrating the incompatibility with literary and sacred texts translation, and 'dethroning' the authority of the source text, giving more freedom to the translator to manipulate its original message.

4. Christiane Nord: Functional Adequacy and Loyalty

Informed by Vermeer's Skopos theory, Christiane Nord (1997) introduces her functionalist "practical, pragmatic, and purposeful" approach to translation. Nord defines translation as a purposeful activity aiming at incorporating the pragmatic and cultural dimensions neglected in previous theories (Boaheng, 2025). To address the criticism directed to the functionalist perspective, Nord presents the 'Loyalty' principle as an ethical constraint in the functionalist orientation. Nord argues that even if functionalism centres around the purpose of translation in the target text context, it must not allow a complete licence to the translator who is a professional intercultural expert and an ethical mediator. By introducing the 'Loyalty' principle, she advocates for a principled relationship between ST and TT to attain both functionality and loyalty. The translation, then, should reach compatibility between the original author's intentions and the target-text purpose (Munday, 2016).

Nord (as cited in Mahmoud, 2023) further stresses the pitfalls of the linguistically-based approaches given their ignorance of the pragmatic and cultural aspects of language. She adds that the translation process not only requires linguistics but also a culture theory to navigate the communicative functions of languages involved in translating, emphasizing the central role of culture as a conceptual and analytical tool for the translation process.

To sum up, these perspectives present the development of translation theory from text-oriented approaches to functional perspectives highlighting various dimensions in the

translation process including text types, translation purpose, author's intent, translator's ethical responsibility, and cultural components.

IV- The Complementarity of Linguistic and Functional Approaches to Translation.

In translation studies, the development of translation approaches has been significantly marked by the evolution from linguistic to functional approaches, underscoring a shift of paradigms and priorities. It is obvious that the two perspectives differ considerably in navigating the translation process from source text adherence, structural correspondence, and formal similarity to an emphasis on the purpose and function of translation, the target audience, and loyalty to the original. However, the two approaches can address different, yet complementary aspects in the translation process. On the one hand, linguistic approaches provide techniques to deal with texts requiring formal accuracy and semantic precision such as technical, scientific or legal texts, showing the required fidelity to the original. Functional approaches, on the other hand, prioritize more flexible strategies as they focus on purpose, audience, and context which can be applicable in handling literary, advertising, and intercultural contexts. Both perspectives have strengths and weaknesses that need to be well recognized by translators in order to select and adapt the corresponding framework according to the communicative requirements of each translation situation, thereby illustrating that linguistic and functional perspectives should be viewed as compatible rather than mutually exclusive.

In this respect, considering that all kinds of acts of translation are acts of communication, Hatim and Mason (1997) demonstrate that effective translation extends beyond linguistic and functional dimensions. Instead, translation quality builds on integrating linguistic, textual, discourse, pragmatic, and contextual features in translation. This framework strongly aligns with the complementary nature of both linguistic and functional approaches to translation. That

is, an appropriate translation competence should combine multiple linguistic, communicational, intercultural and contextual elements to navigate various translation situations effectively.

Additionally, House (2014) maintains that translation quality is determined by both linguistic equivalence and communicative function. As she believes that "*translation is the replacement of a text in the source language by a semantically and pragmatically equivalent text in the target language*" (House, 1997, p.31). House reveals that an adequate translation text is pragmatically and semantically equivalent one, taking into account the functional equivalent to that of the source text. Her model of translation quality assessment establishes a comprehensive framework for conducting translation processes based on sociolinguistic dimensions such field, tenor, and mode to guarantee functional equivalence. Thus, House (1997) places great emphasis on both linguistic and functional elements to find functional equivalent in various intercultural contexts.

V- Criteria for Selecting Between Linguistic and Functional Approaches

Although linguistic and functional approaches provide complementary translation perspectives, deciding on which approach is appropriate should be guided by specific criteria related to the translation context. Translation decisions should mainly be informed by a set of requirements including equivalence, text type, communicative function, cultural context, target audience, and ethical constraints. The linguistic orientation is particularly appropriate when the translation context requires linguistic equivalence, semantic precision, terminological consistency and fidelity to the original. These characteristics can be associated with technical, scientific, legal, and academic texts, where the preservation of accurate concepts and terminology is more important. By contrast, when a translation context requires that priority must be devoted to the function of translation, the intended effect on the target audience, and the communicative purpose, the functional approach becomes increasingly significant. These criteria can apply to literary, advertising, persuasive, and public communication texts which

require moving beyond formal equivalence to convey the intended persuasive and communicative effect of the original.

Moreover, the relative relevance of the two approaches can also be determined by cultural context and target audience. Cultural differences between source and target cultures can either be addressed by preserving the source text's cultural elements where linguistic correspondence is appropriate or by opting for cultural adaptation to convey the intended communicative purpose. Likewise, the expectations of the target audience may influence the translator's decisions on the degree of fidelity to the original or adaptation to the target audience. For instance, in informative texts, "free form, but faithful content" is important because message or information is more important than the format (Zheng, 2018). That is, translators must produce a text that is likely to be meaningful to the receiver of the target culture. Ethical constraints, on the other hand, is an instrumental criterion in both linguistic and functional perspectives. Translators are ethically responsible of maintaining accuracy, avoiding distortion of the main message, and taking informed translation decisions that are compatible with the translational context.

Overall, the criteria aforementioned should not be considered as fixed distinctions in selecting between linguistic and functional approaches. They provide the basis for establishing the relevance of each perspective in line with the requirements of the translation situation. While the linguistic approach deals with formal correspondence, semantic precision, and textual equivalence, the functional approach focuses on the communicative intentions, cultural contexts, and the intended function of the target text. Yet, the application of these orientations should not be regarded as mutually exclusive since effective translation requires the integration of linguistic accuracy and functional adequacy. As a result, their complementarity lies in their capacity to address different but interconnected dimensions of the translation process.

VI- Conclusion

This article has examined the linguistic and functional approaches of translation as two cornerstones in translation studies. Although the two frameworks conceptualize the translation process differently, they are regarded as complementary perspectives rather than contradicting paradigms. While linguistic approaches place greater emphasis on formal correspondence, and structural equivalence, functionalism gives priority to purpose, context, and audience-oriented decision-making. The discussion has demonstrated that each approach addresses different translational contexts and is therefore suited to different text types. Recognizing their complementarity allows for a more comprehensive understanding of translation as a linguistic and a communicative activity, reinforcing the need for flexible theoretical frameworks in translation studies.

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