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On the Coronal Palatalization in Early Modern and Present-Day English*

Abstract: In this paper we look at the case of coronal palatalization [t d s z] > [ʧ ʤ ʃ ʒ] in both Early Modern English (EModE) and Present-day English (PDE) with the aim to determine its major phonological factors (such as the context, triggers, etc.) and to explain the existence of numerous palatalized/unpalatalized variants found in different accents of contemporary English, e.g. [ʧuːn]/[tuːn]/[tjuːn]. It is argued here that the key to understanding the operation of palatalization in contemporary English is the change in the parameter setting which allows/disallows for the merger of two antagonistic elements within a single melodic expression – the *|U I| constraint. This Middle English (ME) innovation guarantees the coronals, to the exclusion of labials and velars, the right to undergo full palatalization. Moreover, the historical perspective adopted in this paper sheds some light not only on the linguistic micro-variation evident in contemporary accents of English, i.e. the existence of [ʧuːn]/[tuːn]/[tjuːn] variants, but also on the absence of front vowels from the group of potential palatalization triggers. It is pointed out that the evolution of the ME diphthong [iu] > [juː], a process which bears a direct responsibility for the later coronal palatalization and the growth of the heterogeneous forms in PDE, is a natural reaction to the *|U I| constraint.

Keywords: coronals, glide, palatalization, Early Modern English, Element Theory

1. Background

This paper investigates a single case of palatalization in PDE, that of coronal palatalization [t d s z] > [ʧ ʤ ʃ ʒ] as found in numerous contemporary varieties of English, e.g. General American (GA) *don't you* [doʊnʧə], *this year* [ðɪʃ jɪər] (Wells 2000; Bateman 2007).[1] More specifically, it aspires to contribute to a lively

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debate on the phonological conditions of the coronal full palatalization[2] which include the context, target(s) and trigger(s) participating in this assimilatory process (see, e.g. Escure 1976; Rubach 1984; Halle and Mohanan 1985; Borowsky 1986, and Jensen 2022). The process is assimilatory in that the consonants targeted by palatalization become more similar in their place of articulation to the segment that triggers palatalization. Additionally, coronal palatalization exhibits a shift in the manner of articulation where the stops become sibilant affricates, e.g. [t d] > [tʃ dʒ] (affrication). Generally speaking, the case of coronal palatalization fits into the broader phenomenon of consonant-vowel(vocoid) interaction that has been frequently reported in numerous languages (Kochetov 2011, 1674). However, in opposition to the previous analyses, the discussion here focuses primarily on the coronal full palatalization across word-boundary.

At first sight, the process under investigation looks like a typical example of full palatalization because it represents the most common pattern found cross-linguistically (Bateman 2007, 2011; Kochetov 2011). First, PDE palatalizes only coronals, the consonants that are the most common targets of palatalization in cross-linguistic studies. Second, the outcome of palatalization is once again a typical palato-alveolar affricate or fricative [tʃ dʒ ʃ ʒ]. On the other hand, however, while the front, high vocoids are statistically the most common triggers of palatalization (Bateman 2011; Kochetov 2011), it is only the front glide [j] that activates full palatalization in English. And although in some cross-linguistic studies (Chen 1973; Bhat 1978; Bateman 2007) glides are reported to be better palatalization triggers than vowels, the palatalization pattern found in English still deserves an explanation. In short, since in the cross-linguistic studies coronals are the most common targets and the front, high vocoids the most common triggers of palatalization, the question arises why in PDE coronals undergo full palatalization only before the glide [j],[3] e.g. *want you* [wɑːntʃ jə] vs. *want it* [wɑːnt ɪt]. This situation is surprising inasmuch as in Element Theory (ET), a model of the internal organization of segments which is adopted for the present analysis, the glide [j] and the front vowel [i] contain the same phonological material, i.e. while both of them are |I̲| segments, their different phonetic realization depends solely on syllabic affiliation: the element |I̲| is interpreted as [i] in the vocalic slot but as [j] in the consonantal position. It is assumed here that in order to understand why it is only the glide [j] that activates the full palatalization of coronals in PDE, it is necessary to refer back to the earlier stages of English development. This step will help us to explain the complex relation between coronals and the glide [j] in different varieties of PDE, e.g. *tune* [tuːn]/[tʃuːn]/[tjuːn].

Moreover, although in more recent studies (Bateman 2007; 2011) the cross-linguistic implicational palatalization scale of the type labial > coronal > dorsal has been replaced by a scale where coronals and dorsals are grouped together[4], the absence of velars among the targets of full palatalization in PDE still begs the question, even more so as the velars escape palatalization before the most common trigger, that is, the glide [j], e.g. *thank you* [θæŋk jə].[5]

Interestingly, while in historical English dorsals (stops and fricatives) were common targets of full palatalization, e.g. /k/ > [ʧ] Old English (OE) *cild* > PDE *child*, and /ɣ/ > [j] OE *gēar* > PDE *year*, in PDE they can at most face the fronting effect before front vocoids.[6] It simply means that in PDE the phonetic difference in the realization of the velar stop in *cool* and *keen* is phonologically irrelevant, i.e. it does not affect the internal structure of velars. The velar stop in the latter word is affected neither by secondary palatalization [kʲ] nor by obviously full palatalization [k] > [ʧ]. As such, it is without interest from the phonological perspective and will not be included in the following analysis.[7] The above discussion is important in so far as in some previous studies the explanation of the existence of implicational relations in palatalization (such as labial > coronal > dorsal) was phonetically motivated (e.g. Evolutionary Phonology, see Blevins 2004). For example, Guion (1998) argues that the common historical changes /k/ > [ʧ] and /t/ > [ʧ] before [i] are best explained as cases of misperception that are motivated by articulation. For her the common result of velar palatalization [ki] > [ʧi] does not have much to do with phonology; rather it should be attributed to common errors in the perception of fronted velars. Similarly, the scarcity of labial palatalization in the cross-linguistic studies is explained by the observation that listeners rarely make errors such as [pi] > [ʧi]. However, the misperception solution to full palatalization is problematic because it suggests that in English listeners stopped making perceptual mistakes at a certain point in time.[8] This is evidenced by the fact that velar palatalization, which was at one time an active phonological process, is now fully deactivated in PDE, e.g. *cute* [kjuːt].

The discussion in the previous paragraph leads us to yet another question of primary importance, namely, which palatalization changes meet the requirements for an active phonological process. This is a non-trivial question as in the literature there are instances of palatalization which some would recognize as phonological, e.g. velar softening /k/ ~ /s/ and /g/ ~ /ʤ/, e.g. *electri*[k] – *electri*[s]*ity, analo*[g] – *analo*[ʤ]*y*, and spirantization /t/ ~ /s/ or /ʃ/, e.g. *secre*[t] – *secre*[s]*y*, *par*[t] – *par*[ʃ]*al*. Such cases, however, do not conform to one of the core assumptions of Government Phonology (GP), that is, the Minimality Hypothesis (Kaye 1992b; 1995; Pöchtrager 2014). This principle guarantees that processes apply whenever their conditions are met. It means that exceptions, derived environment effects and extrinsic rule ordering are either the phenomena that are not related to the application of active phonological processes or are simply invalid procedures of constraining the application of such processes. It follows that pairs like *electri*[k] – *electri*[s]*ity* are assumed not to be related by any synchronic phonological processes but instead belong to separate lexical entries. Generally speaking, processes such as velar softening, spirantization, etc., are extinct in PDE and the alternations they produced are merely historical relics (Harris 1994, 27). In short, in this paper I closely adhere to the Minimality Hypothesis in that I recognize as phonological only those palatalization patterns that are exceptionless and phonologically conditioned. One

of the consequences of this move is that only those cases of coronal palatalization that apply across word-boundary, e.g. *did you* [dɪdʒ jə], are true phonological processes. What is more, since word-internally the full palatalization of coronals, e.g. *Tuesday* [ʧuːzdi], *virtue* [vɝːʧuː], *duty* [dʒuːti], *residual* [rɪˈzɪdʒuəl], *issue* [ɪʃuː], seems to be lexically conditioned in that the pronunciation of such forms by the users of even the same accent may vary, e.g. *tune* [tjuːn] ~ [ʧuːn] and *Tuesday* [tjuːzdi] ~ [ʧuːzdi] (Wells 1982, 331; 2000; Minkova 2014, 144), they are not recognized here as cases of an active palatalization process. Rather they are assumed to have already been lexicalized in particular accents or in the pronunciation of individual speakers.[9] Nevertheless, the existence of different variants of the same form in different contemporary accents of English, e.g. *tune* [tuːn]/[tjuːn]/[ʧuːn], prompts the question of the origin of such coronal+*j* clusters in the history of English and their different developments. Surely, a historically-motivated explanation of the synchronic state of affairs is a highly questionable proposition, but certain (phonological) phenomena simply require a look back to understand the situation in a contemporary language (Backley and Nasukawa 2020). This diachronic approach seems necessary in the case at hand.

Summing up, in this broader perspective the paper examines cases of full palatalization of coronals in both PDE and EModE with the aim to explain the phonological conditions of the process and the major variants found in different varieties of contemporary English. More specifically, it discusses the following questions: 1) why does coronal full palatalization occur only before the glide [j]? 2) Why is it absent before the front vowels [i e]? 3) How to explain the diversity of forms with the historical coronal+*j* clusters in the contemporary accents of English? Additionally, we address the puzzle of the lack of labial and velar full palatalization in PDE. In order to understand the current situation, though, we must briefly refer back to the period of EModE in which coronal palatalization applied productively.

It will be argued that the key to understanding the intricacies of palatalization in English (both synchronically and diachronically) is the change in parameter setting responsible for the combination of two antagonistic elements within one segment, i.e. the *|U I| constraint (Section 4). This section is preceded by a short introduction to the ET model (Section 2), and the discussion of the relevant data in English (Section 3). Section 5 gives a summary of the findings in the paper.

2. Element Theory

The analysis of coronal palatalization, to be proposed in the following sections, is couched in Element Theory − a phonological model that employs a set of monovalent cognitive elements for the representation of segments (Kaye et al. 1985; 1990; Harris 1994; Harris and Lindsey 1995; 2000; Backley 2011). Elements are abstract units of structure representing internalized patterns

(auditory images) which are directly associated with certain acoustic properties in the speech signal (1). Similarly to the traditional distinctive features, elements define natural classes of sounds, i.e. they express lexical contrasts and represent the properties that actively participate in phonological processes. However, elements differ from features in that they are associated with acoustic patterns in the speech signal rather than with articulatory properties (Backley 2017, 1). The standard version of ET adopted in this study (Backley 2011), employs a total of six elements: three resonance elements |I U A| and three non-resonance elements |ʔ H L|.

1. Acoustic properties of elements (adapted from Backley and Nasukawa 2020, 86)

    a. Resonance elements
       |I| low F1 with high spectral peak (F2-F3 convergence)
       |U| low spectral peak (lowering of all formants)
       |A| energy mass in center of frequency range (F1-F2 convergence)

    b. Non-resonance elements (source/laryngeal)
       |ʔ| abrupt and sustained drop in energy
       |H| aperiodicity, noise
       |L| periodicity, murmur

Crucially, the elements may appear in the melodic make-up of vowels and consonants. For example, a single element |I| linked to a vocalic slot is realized as the vowel [i] (2a). The same element attached to the consonantal position is pronounced as the palatal glide [j] (2b). This means that the distinction between a consonant and a vowel is sometimes expressed only by the syllabic affiliation of a segment.

2. The representation of the vowel [i] and the palatal glide [j]

        a.   N   b.   O
                | |
                x   x
                | |
               |I| |I|

                i   j

As a consequence, each element has at least two different interpretations depending on the affiliation: a vocalic interpretation and a consonantal one. More generally,

the resonance elements represent not only vowel distinctions but also place properties in consonants, while the non-resonance elements express tonal and laryngeal properties in vowels as well as the source and laryngeal properties of consonants (3).

3. Phonetic interpretation of elements in nuclear/non-nuclear position (Backley and Nasukawa 2020, 86)

a. Resonance elements
   nuclear   *non-nuclear*
   |I| front vowels   coronal: dental, palatal place
   |U| rounded vowels   dorsal: labial, velar place
   |A| non-high vowels   guttural: uvular, pharyngeal place

b. Non-resonance elements (source/laryngeal)
   non-nuclear   *nuclear*
   |ʔ| oral/glottal occlusion   creaky voice (laryngeal vowels)
   |H| aspiration, voicelessness   high tone
   |L| nasality, obstruent voicing nasality, low tone

Elements are big enough to be interpreted in isolation but they can also combine to form compound expressions. Element combinations are asymmetrical in the sense that they form a head-dependent relation in which the headed element displays a stronger and more prominent acoustic pattern than the dependent (or non-head). One of the consequences of these asymmetrical combinations is that each element has at least two phonetic realizations, i.e. the head and non-head realization. For example, while the audible release phase in voiceless stops is represented by non-headed |H|, a headed element |H̲| stands for aspiration which is a more salient form of stop release.[10] Similarly, the contrast between the voiceless labial /p/ and velar /k/ stops in the consonantal system of English is captured by the head-dependent relation in that the former consonant is represented as |U̲ ʔ H|, while the latter as |U ʔ H|. Notice that velars and labials are represented by the same element |U|. Since, however, both categories are contrastive, they must have distinct structures. This distinction is captured by a difference in headedness in that labials have headed |U̲| while velars have non-headed |U| (Backley and Nasukawa 2009; Backley 2011; Kijak 2017). Finally, even though elements are free to combine with one another within a single segment, certain combinations are more marked than others where the more marked ones simply represent cross-linguistically rare segments. The markedness is a direct consequence of the merger of two elements with contradictory acoustic properties. One example of such an antagonistic pair is the combination of |U| and |I| (formant lowering + high F2) which defines cross-linguistically rare segments such as the front rounded vowels [y ø] and the palatovelar obstruents [c ɟ ç j].[11] In

response to the recognition of such markedness constraints, the elements have been organized into two groups which are informally referred to as the dark |U A L| and light |I ʔ H| sets (Backley 2011, 200ff). Additionally, elements form three opposing pairs where each pair defines the polar values of three fundamental properties of spoken language: color, resonance, and frequency (Table 4).

4. The antagonistic pairs of dark and light elements (Backley 2017, 9)

	dark			light	
fundamental	*value*	*element*		*value*	*element*
color	dark	|U|	vs.	light	|I|
resonance	resonant	|A|	vs.	non-resonant	|ʔ|
frequency	low	|L|	vs.	high	|H|

It is further assumed that even if a language allows for the merger of the opposing elements within one segment, only one of the elements of the antagonistic pair can play the head function.

   Brief as it has been, the discussion of the theoretical underpinnings of the ET model finally allows me to introduce the elemental make-up of the English consonants and vowels (in (5) below), directly followed by the presentation of the linguistic data (next section). The representation in (5) contains only those segments that are directly relevant for the present study.

5. Internal structure of selected consonants and vowels in English

labial stops	/p/	|U̲ ʔ H|	/b/	|U̲ ʔ|
velar stops	/k/	|U ʔ H|	/g/	|U ʔ|
coronal stops	/t/	|A ʔ H|	/d/	|A ʔ|
coronal fricatives	/s/	|A H̲|	/z/	|A H|
palato-alveolar fricatives	/ʃ/	|I̲ H|	/ʒ/	|I H|
palato-alveolar affricates	/ʧ/	|I̲ ʔ H̲|	/ʤ/	|I ʔ H|
palatal glide	/j/	|I̲|		
front vowels	/i/	|I̲|	/e/	|I̲ A|
back vowels	/u/	|U̲|	/o/	|U̲ A|

Some explanation concerning the phonological status of affricates in (5) is in order here. In what follows I take /ʧ/ and /ʤ/ to be segments which are phonologically identical to simple stops in that both categories are represented as non-contour structures. The only difference between these two categories is the way they are phonetically interpreted. More specifically, while in plain stops the release phase is short and may even be inaudible, affricated stops are realized with a prolonged burst (friction), accompanied by audible resonance. To put it differently, the delayed

release in the case of affricates is recognized as a mere cue enhancement and hence it is not reflected phonologically as a contour structure of any sort (Cyran 2010; Backley 2011, 108).[12]

3. The evolution of the trigger of coronal full palatalization

Despite some instances of alleged full palatalization of coronals which are scattered through the early periods of English, e.g. OE *fecc(e)an* < **fetjan* 'to fetch',[13] *micgern* < **mid+gern* 'fat', *ortgeard* < **ort+geard* 'orchard'[14] (Minkova 2003, 110; Stenbrenden 2019, 712), the process began to operate productively only in EModE. The key reason behind this is that it was in ME that the [iu] diphthong started its gradual evolution towards a monophthong [iu] > [juː] > [uː] – a development which has been progressing ever since. More specifically, the emergence of the glide [j] is responsible for the appearance of numerous new consonant clusters in the language including that of the coronal+*j* type which later on undergoes full palatalization.[15] The productivity of the palatalization process is well illustrated by the fact that even though 18th century dictionaries record the coronal+*j* realizations in the vast majority of words (Beal et al. 2020), in contemporary dictionaries the same words are either listed with a palatalized coronal as the dominant pronunciation or at least it is noted as a local variant, e.g. *punctual*, *gradual*, *issue*, *casual*, etc.[16]

Without going into excessive detail, there are three major sources for the emergence of the [juː] sequence in EModE (6):

6. The source and evolution of the [iu] diphthong in EModE (Wełna 1978; Minkova 2014)[17]

    a. LOE [iː]+[w] > ME [iw] > [iu] > [juː]   *new, music, rule, Tuesday,* etc.
    b. ME [ew] > [iu] > [juː]   *due, hue, brew, blue, crew,* etc.
    c. OF [yː] > ME [iu] >[juː]   *duke*, *sugar*, *sure*, *glue,* etc.

The developmental paths in (6) outline the main changes which lead to the emergence of the [juː] sequence in EModE. In ME the forms on the right in (6) above contained a variety of vowels [iw, ew, yː] which had evolved into a falling diphthong [iu] by the early 17th century.[18] More specifically, along with the [iw] and [ew] merger (6a-b), these native sources were enriched by a set of French words with a high front rounded vowel [yː] (6c), which was reanalyzed and adopted as [iu] (Minkova 2014, 268).

At the beginning of the 18th century the sequence [juː] < [iu] experiences further modifications as in certain contexts the glide element disappears, leaving a long monophthong [uː]. This glide-deletion process, which is known as Early Yod Dropping (Wells 1982, 206–208), applied widely after palatals, e.g. *chute,*

chew, juice, the rhotic [r], e.g. *rude*, and consonant clusters, e.g. *plume, blue, fruit, cruise*. However, [j] is retained after labials, velars and the fricative [h] in the majority of accents, e.g. *mute, pure, view, cube, secure*, *human, huge*. The fate of the glide in the context after coronals is much more complex and multifarious. Thus, after the coronal sonorants [l n], fricatives [s z θ] and stops [t d] there "continues to exist widespread variation across regional accents, registers and individual lexical items" (Minkova 2014, 268). General American normally presents more widespread glide-deletion phenomena than British accents. It means that for many GA speakers the sequence [juː] which occurs after coronal consonants is either preserved or reduced to [uː] (a more frequent option), e.g. *reduce*, *attitude*, *news*, *enthusiasm*, *assume*, *presume*, *allude*, etc., fully palatalized variants are also possible, e.g. *situate*, *education*, *issue*, etc. (Wells 1982, 248). Interestingly, it is reported that the latter pronunciation tendency is gaining popularity in various London accents (Wells 1982, 330). The observation that full palatalization continues its conquest of the coronal+*j* sequences is evidenced by the growing tendency to apply the process to the same sequences across word boundaries in PDE, e.g. *this year* [ðɪʃ jɪər], *bet you* [betʃ jə], *did you* [dɪdʒ jə], etc. Crucially, for the full palatalization to take place across word boundaries, the words must form a unified prosodic domain, that is, a clitic group with a single stress (Minkova 2014, 145).

The following section offers an explanation for the diverse developmental patterns of the glide in the [juː] sequences discussed above. More specifically, section 4 clarifies the retention of [j] after labial and velar stops (the lack of full palatalization) and its propensity to trigger full palatalization (coronal obstruents), and finally the same section proposes a constraint which provoked the evolution of the [iu] diphthong in ME. This constraint, as argued in Kijak (2022), is responsible for numerous developments in the history of English, e.g. velar full palatalization and vowel unrounding, both of which arguably took place in ME.[19]

4. Analysis

A reasonable conclusion which can be drawn from the discussion in the previous section is that the primary source of the coronal full palatalization in English was the evolution of the ME diphthong [iu]. Therefore, it is necessary to look at this development more closely in order to understand the real reason behind the disintegration process [iu] faced in EModE. Note that the diphthong [iu] is a complex melodic expression containing two antagonistic elements, that is, light |I| and dark |U|. Since both elements belong to the same fundamental category of color (see Table 4 above), only one of them can play the head function, hence [iu] is represented by the combination of the elements |I̲ U|. Now, in the distant past English unquestionably enjoyed the ability to merge these elements in

a single melodic expression as evidenced by, for example, the presence of the front rounded vowels [y ø] in the vocalic inventory of both OE and (early) ME. These front rounded vowels are combinations of |I| and |U|, hence [y] |I̲ U| and [ø] |I̲ U A|. However, in ME the ability to merge the two elements must have terminated because the front rounded vowels disappeared from the language, i.e. they underwent unrounding: [y] > [i] and [ø] > [e]. The explanation for this change could be sought by assuming the existence of a parameter setting which allows or disallows the |U| and |I| merger in the language. This line of reasoning is taken by Kijak (2022) who argues for the presence of the *|U I| constraint in English. To put it briefly, Kijak (2022) claims that in OE/early ME the parameter setting is switched on, which results in a free co-occurrence of the elements of the antagonistic |U I| pair. Some evident results of this parameter setting include the secondary palatal articulation of velar stops [k] > [kʲ] |U ʔ H| > |U I̲ ʔ H|, vowel *i*-mutation [u] > [y] |U| > |U I̲| and, generally, the presence of front rounded vowels in the OE vocalic system. All of them are a direct result of the ability to merge the elements |U| and |I|. Crucially, ME witnessed a turn towards the opposite setting which resulted in the affrication of secondary palatalized velars [kʲ] > [ʧ] = |U I̲ ʔ H| > |U̲ I̲ ʔ H̲| and vowel unrounding [y] > [i] = |I̲ U| > |I̲ U̲| and [ø] > [e] = |I̲ A U| > |I̲ A U̲|. In the cases at hand, the element |U| must go, as the |U I| combination is not allowed any more. Note that in both situations a stronger, headed element |I̲| survives, while the dependent |U| disappears. Summing up, the *|U I| constraint was activated in ME and it has been operating ever since. Now, coming back to the evolution of the ME diphthong [iu], the reason why it starts to disintegrate at this period becomes evident in the context of the above discussion. The *|U I| constraint starts to operate and in consequence the melodic expressions containing this antagonistic pair must react in one way or another. In the case of [iu], the clash between |U| and |I̲| was settled by shifting the latter element to the preceding Onset position and leaving the former one in the Nucleus. At this stage we arrive at the sequence [juː], the development of which is illustrated in (7).

7. The development of [juː] < [iu]
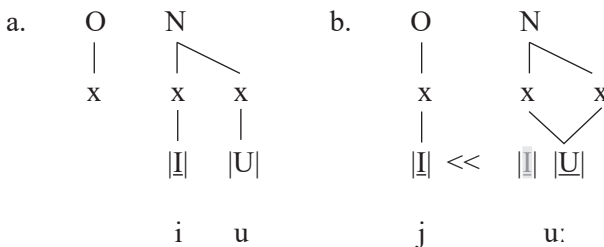
The |I̲| migration to the preceding Onset in (7b) is a direct consequence of the application of the *|U I| constraint introduced in ME. Since now it is linked to the consonantal position, the element |I̲| gets the glide [j] interpretation (see (2) above). Another consequence of this move is the lengthening of the remaining vowel [u] which becomes associated with two positions and hence is phonetically realized as the long vowel [uː], e.g. *tune* [tjuːn], *Tuesday* [tjuːzdi], etc. Furthermore, the consolidation of the newly formed glide was possible only if there was enough room for it in the Onset: compare *tune* [tjuːn] vs. *blue* *[bljuː], *crew* *[krjuː].[20] To put it differently, in a situation when both positions in the Onset were taken, the glide did not have a chance to survive and got dropped at an early stage (Early Yod Dropping, Wells 1982, 207).[21] A question immediately arises: why is it the headed |I̲| rather than the dependent |U| that shifts to the Onset position? The explanation may be sought in the asymmetrical behavior of the light and dark elements. More specifically, it has been proposed that the light elements |I ʔ H| have the tendency to appear at the left boundary of a prosodic domain (the beginning of a word, syllable domain) (Backley 2017, 9). In accordance with this tendency, the light element |I̲| of the [iu] diphthong moves to the left and colonializes the available Onset position – the initial step in which [iu] develops into [juː] (7a-b above). It can even reach as far as the first consonant (provided it is a coronal obstruent) and trigger full palatalization, e.g. EModE *tune* [ʧuːn], *issue* [ɪʃuː], etc. This final step is illustrated in (8) below.

8. Coronal full palatalization [tjuːn] > [ʧuːn]
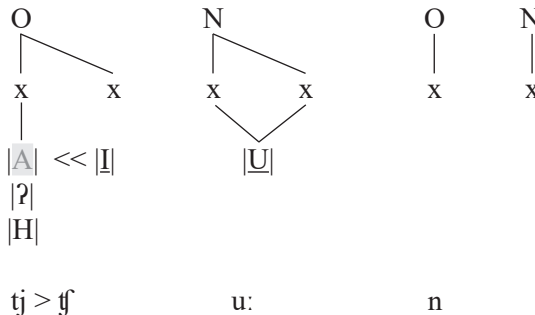
In order to comply with the *|U I| constraint, the element |I̲|, which was originally part of the diphthong [iu] (7a), is moved to the left and becomes part of the branching Onset, e.g. *Tuesday* [tjuːzdi], *cube* [kjuːb], *beauty* [bjuːti], etc. (7b). This is not the end of the road for the element |I̲| as it may continue its leftward migration and colonize the initial position occupied by the coronal obstruent – palatalization stage, e.g. [tjuːn] > [ʧuːn] in (8).[22] Now, the reason why it is only coronals, to the exclusion of labials and velars, which may get colonized by the following glide and in consequence undergo full palatalization, is once again the change in the

parameter setting. More specifically, if, as argued by Kijak (2022), the secondary palatal articulation is a prerequisite of full palatalization, the failure to undergo it in the case of labials and velars is a direct consequence of the *|U I| constraint (a ME innovation). In short, a situation in which the glide (represented by |I|) triggers the palatalization of labials (represented by |U|), is not possible in English because the merger of the antagonistic pair of elements is avoided. Moreover, a situation in which both elements of the antagonistic pair, which are members of the same (color) category (see Table 4), play the head function, viz. *|U̱ I̱|, is generally predicted to be impossible (Backley 2017).[23] Similarly to labials, the velar consonants are also represented by the element |U| but in a different function (dependent/non-head), see (5) above. Therefore, an explanation of why velars are not targets of full palatalization in EModE/PDE becomes clear at this stage of discussion. Just like labials, velars cannot undergo full palatalization because it would mean the violation of the *|U I| constraint. It will be recalled that the reason why in the history of English velars were affected by full palatalization on a massive scale is the parameter setting which was adjusted to the ability of combining both elements or simply the absence of the *|U I| constraint.

Finally, the absence of front vowels among the palatalization triggers in PDE must also be mentioned here. As argued above, the road to the full palatalization of coronals was initiated by the disintegration process of the ME diphthong [iu] which in response to a newly introduced constraint evolves into the sequence [juː]. In a situation when the glide joins the coronal obstruent in the Onset, the latter consonant becomes susceptible to full palatalization. Note that coronal full palatalization was a very productive process in EModE. For instance, Beal et al. (2020) report that in some 18th century dictionaries, e.g. Sheridan 1780 (also Walker 1791), the majority of coronal+*j* clusters are recorded as fully palatalized. The explanation why most of the 18th century dictionaries systematically record unpalatalized variants may lie in a strong prejudice towards palatalization displayed by their authors. This resulted in a long-lasting stigmatization of palatalized forms, the consequence of which is the observed divergence in contemporary accents, e.g. [tuːn]/[tjuːn]/[ʧuːn]. However, the productive status of the coronal full palatalization in EModE can be confirmed by the growing tendency to apply the process across word-boundary in PDE, e.g. *meet you* [miːʧ jə], and the popularity of the palatalized forms recorded in up to now conservative (London) accents, e.g. *Tuesday* [ʧuːzdi] (Wells 1982). What is important for the present discussion, however, is that the coronal full palatalization was initiated by the glide [j], the process applied productively to the coronal+*j* sequences in EModE (prescriptive tendencies put aside) and is continued in PDE in a situation when the coronal obstruent occurs in front of the glide across word boundary, e.g. *bet you* [beʧ jə]. It simply means that in opposition to [j], front vowels have never been among the triggers of coronal full palatalization, a tendency which is preserved in PDE. As already mentioned (in footnote 2 above), this situation is not uncommon from a cross-linguistic perspective (Chen 1973; Bhat 1978).

5. Conclusions

This article has argued that the coronal full palatalization, a process which expanded rapidly in EModE and is continued in PDE (across word boundary), is an indirect effect of the *|U I| constraint – a ME innovation. Due to the working of this constraint, English lost front rounded vowels (vowel unrounding), the palatalized velars underwent affrication and the ME diphthong [iu] evolved into [juː]. In the latter development, in a situation when the glide happened to arise in the context of a coronal obstruent, some further modifications took place. For example, while the glide was generally dropped in GA, e.g. [tuːn], it was normally retained in British English, e.g. [tjuːn]. Moreover, the glide could trigger palatalization of the preceding coronal while at the same time being either lost or retained itself, e.g. [ʧuːn] and [pʌŋkʧuəl]/[pʌŋkʧjuəl]. It has been suggested that the key to understanding this developmental diversity of the coronal+*j* clusters, which is commonly reported to exist even among the speakers of a single accent, can be found in prescriptive tendencies and the stigmatization of the palatalized forms as vulgar from the very beginning of their emergence. More generally, it has been shown that the arrival of the glide [juː] < [iu] contributed to the formation of various new clusters in EModE including coronal+*j* clusters. While the glide was generally retained after labial and velar consonants, e.g. *pupil* ['pjuːpᵊl], *cure* [kjʊᵊr], it acted as a palatalization trigger of the preceding coronal, e.g. *issue* [ɪʃuː]. Although narrowed down to the word boundary context, the coronal full palatalization is continued in PDE and it has been gaining popularity among the speakers of various English accents (including conservative RP speakers). It has been pointed out that this historical background of the coronal full palatalization, i.e. ME [iu] > EModE [juː], may shed some light on the absence of front vowels among the palatalization triggers in PDE. It does not matter whether it is the effect of some historical development [iu] > [juː] or not; the glide has always been the only trigger of the coronal full palatalization in English. This pattern is not uncommon in the cross-linguistic studies. Finally, it has been argued that the reason why it is only coronals, to the exclusion of labials and velars, which are the targets of full palatalization in contemporary English is the introduction of the *|U I| constraint to the language. Since this constraint guarantees the inability to merge two antagonistic elements within one segment, the labials |U̲| and velars |U| are not among the potential targets of the secondary and so also the full palatalization in PDE.

Notes

1   Note that while triggering the palatalization of the preceding coronal across the word boundary, the glide [j] is either retained, e.g. [ðɪʃ jɪər] or totally merged with the preceding consonant, e.g. [doʊnʧə]. My best guess is that it is

related to the tempo of speech and/or individual speaker's preferences. Since, however, it does not have any direct consequences for the proposed analysis, in what follows I am going to transcribe such examples with the glide.

2   After Bateman (2007, 2), I adopt the distinction between full palatalization, e.g. [t] > [ʧ], [k] > [ʧ] and secondary palatalization, e.g. [t] > [tʲ]. In the latter scenario, a consonant acquires a secondary palatal articulation without any shifts in the primary place and/or manner of articulation.

3   See Borowsky (1986, 308) who grapples with the same problem.

4   Bateman (2007; 2011) argues that Chen's (1973) palatalization scale according to which the presence of coronal palatalization presupposes dorsal palatalization within the same phonological system is too restrictive and so she proposes to replace it with a less restrictive one: labial > coronal and dorsal.

5   A new analysis of the full palatalization of velars in the history of English and the lack of it in PDE is proposed in Kijak (2022), cf. Escure (1976).

6   Just as in the case of labials, the fronting of dorsals before the front vowels and [j] in PDE does not qualify as a phonological process. In other words, the fronting is assumed here to be merely a phonetic effect without any influence on the internal structure of segments and hence it lies outside phonology proper.

7   The gradient fronting of /k/ before front vocoids is fully automatic and is part of universal phonetics, i.e. it is shared by all languages (Hyman 1975, 171).

8   A reviewer has rightly pointed out to me that this does not seem to be a problem if one makes the additional assumption that there has been a change in the coarticulatory patterns of English towards less gestural overlap (e.g. Smith et al. 2019; Stevens and Harrington 2022). This would predict fewer perceptual errors, which could lead to the deactivation of velar palatalization.

9   This situation is further complicated by the fact that the forms with the fully palatalized coronals were recognized in the past as vulgar, for example in Received Pronunciation (RP), and stigmatized (Beal et al. 2020). This situation may sometimes lead to hypercorrection, e.g. just [djʌst] (Wells 1982, 331).

10 By convention the underlined elements represent heads.

11 Backley (2011, 39) reports that 'front rounded vowels such as [y ø] are found in less than 7 per cent of the world's languages.' Similarly, both palatovelar stops [c ɟ] and fricatives [ç ʝ] are rather limited cross-linguistically (Backley 2011, 101).

12 For a recent overview of the literature on the representation of affricates, see Lin (2011). For a different representation of affricates in a recent version of GP (GP 2.0.), see Pöchtrager (2021).

13 Hogg (1992, 270–272) assumes that the dental stop+*j* spellings, which are common in late West Saxon, confirm the affricated realization as early as the ninth century.

14 Since Stenbrenden (2019) argues for the late arrival of [ʤ] in English (Late

ME), which on its road to affricate went through the [dj]/[dj] stage, viz. [ɟ�] > [ɟj] > [dj]/[dj] > [ʤ], her reconstruction could be used to mark the beginning of coronal palatalization which started to operate on a large scale only in EModE.

15 This process is also known as yod coalescence (e.g. Wells 1982; Beal et al. 2020).

16 For an exhaustive comparison and illustration of the forms containing the coronal+*j* clusters in 18th century dictionaries, see Beal et al. (2020, 519ff).

17 In (6) LOE and OF stand for Late Old English and Old French, respectively.

18 The [iu] diphthong has survived in the conservative Welsh English and some American varieties (southern and New England). For example, in the former accent there is still a distinction between *threw* [θriu] and *through* [θruː] which are homophones in other accents (Wells 1982, 206).

19 The idea that the full palatalization of velars [k g] > [ʧ ʤ] occurred in ME is advocated in Minkova (2003; 2016; 2019), Stenbrenden (2019) and Kijak (2022).

20 The same argument was used in the discussion concerning the status of s+C(C) consonant clusters in English, see Kaye (1992a); Harris (1994, 61ff); Gussmann (2002, 113).

21 This is only one of the reasons of the Early Yod Dropping as the glide was also lost after palatals and [r], e.g. *chute*, *rude* (Wells 1982, 207).

22 I leave the question open for further discussion whether on their road to full palatalization, the coronal obstruents pass through an intermediate stage, that is, secondary palatal articulation, e.g. [tj] > [tʲ] > [ʧ]. However, in the light of recent findings (Kijak 2022), I think this is perfectly possible.

23 It may explain the universal ban on labial full palatalization (Bateman 2011; Kochetov 2011; Backley 2017, 13).

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"Dude" and "Dudette", "Bro" and "Sis": A Diachronic Study of Four Address Terms in the *TV Corpus*

Abstract: This corpus linguistics study offers a diachronic perspective on masculine and feminine address terms by analyzing the frequencies of the pairs "dude"/"dudette" and "bro"/"sis" in the 325 million-word *TV Corpus*. Results show an increase of the frequency of "dude" and "bro", a quasi-absence of "dudette", and a stable but low frequency of "sis". They suggest that "dude" and "bro" have taken on generic meanings, while the usage of "sis" remains kinship-specific. They also show that familiarizers are more frequent in American English than in British and Canadian English, and that their frequency in the *TV Corpus* is genre-dependent, with animated series and reality television shows being more conducive to their use.

Keywords: corpus linguistics, diachrony, address terms, gender

1. Introduction

TV dialogue is of particular interest to linguists as it may reflect or even influence ongoing language change (Heyd 2010). Most studies have focused on relatively small corpora compiled by the researchers themselves, such as the *Sydney Corpus of Television Dialogue* (Bednarek 2018), or have focused on a specific television show, for example *Friends* in Heyd (2010) and Tagliamonte (2005). The *TV Corpus*, created at Brigham Young University and released in February 2019 (Davies 2021), has opened new perspectives thanks to its sheer size (more than 325 million words), its diachronic span (from 1950 to 2017), and its rich metadata (country, date, genre, runtime). It can be combined with the IMDb database, allowing for further analyses. It can be used to conduct diachronic analyses which explore the changes in the frequency of words or lexical bundles year after year, as well as multivariate

analyses. It is, according to its homepage, a "great resource to look at very informal language", which offers "unparalleled insight into variation in English" (*The TV Corpus* n.d.). The corpus has been used by recent studies, which have explored variation across genres (Jucker 2021), diachronic variation (Werner 2021; Landert, Säily, and Hämäläinen 2023), and geographic variation (Kang 2022; Hirota and Brinton 2023). This article takes advantage of the size and of the annotation of the *TV Corpus* to offer a diachronic perspective on the use of four address terms. As previous studies of speech, online texts, and TV and movie dialogue have focused on masculine forms which, for some of them ("guys", "dude"), have taken on a generic meaning, we decided to also include their feminine counterparts: "dudette" for "dude", and "sis" for "bro". We provide a diachronic account of the frequency of each term, as well as inferential analyses that compare the use of address terms in American, British, and Canadian English, and in four TV genres: scripted shows, animated shows, documentaries, and reality television. The study is based on concordances extracted from the free version of the *TV Corpus* and merged with the metadata spreadsheet provided by the English-corpora.org website. Carried out with the R software, the analyses rely mainly on the peaks and troughs method (Brezina 2018) and multiple regression models.

2. Address terms

"Guys", "honey", "buddy", "dude", "dudette", "bro", and "sis" are familiarizers and belong to one of the five semantic categories of vocatives described by Leech (1999). According to Leech, they have three functions: to attract attention, select an addressee, and enhance the familiarity between the speaker and their addressee. Hill (1994) retraces the history of "dude", from its earliest recorded use to refer to a person in England, as a "dudesman" or scarecrow wearing old rags. He describes the various shifts in the meaning of the term, which was used to refer to a "dandy" or a "well-dressed man" in late 19th century North America, and then lost its pejorative connotation in the middle of the 20th century by entering the language of Mexican American and African American subcultures. It started to be used by white surfers in the 1960s, which helped spread the term across all socioeconomic lines with the meaning "guy". Hill suggests that, starting from the 1950s, TV had a profound effect on the rise of the address term. He also points out that the meaning of the term widened in the 1980s. It became an exclamation of delight or affection and an expression of disappointment. In the late 19th century, feminine forms of "dude" emerged; "dudine", "dudette", and "dudenette" were used in British and American magazines. Even if for Hill (1994) it may have been an early example of "artificial slang", they were still used in the 1930s to refer to female guests in dude ranches, which hosted tourists (Johnson 2012). Recent studies suggest that "dude" may be becoming a gender-neutral address term. Kiesling (2004), for example, basing his

research on surveys and ethnographic data, suggests that "dude" indexes a stance of "cool" solidarity and is being increasingly used by women. He also found that, when used by women, "dude" may express a stance of distance or non-intimacy from a man. A self-report survey conducted in the United Kingdom found that the familiarizer is used as frequently by men as by women and nonbinary individuals, and that it is thought of as gender-neutral by younger respondents (Pastorino 2022).

"Bro", the abbreviated form of "brother", is attested from the 17th century ("Bro" n.d.). Its use as an address term may come from African American Vernacular English, where it refers to either a "man" or a "Black man" (Schwiegershausen 2013). "Bro" has risen in popularity across race lines and is now associated with "bro culture", a specific type of masculinity exemplified by white college fraternity, and present in sports, country clubs, the military, and male-dominated professions (Jones 2017). The word has been used to create neologisms such as "bromance", "bro-hug", "bro-down" ("Bro Culture"). "Bro" has not attracted the attention of linguists as much as "dude"; Urichuk and Loureiro-Rodríguez (2019), who conducted a self-report survey in Canada, calling masculine vocatives "brocatives", found that "bro" and its variants "brah" and "bruh" are more gendered than "dude", with few women reporting being likely to choose it to address another woman. Unlike masculine address terms, feminine familiarizers have not been the focus of many linguistic studies. It may be due to their scarcity in corpora: they rarely develop generic meanings, while masculine terms such as "guys" or "dude" do (Clancy 1999). However, due to the dearth of research about terms such as "woman", "sis" and "girl" in large corpora, we do not know much about their frequency and the social meanings they index. The frequency of address terms varies across languages. They are, for example, particularly frequent in Spanish (Kleinknecht 2013). Using a corpus-based approach to compare their use in British and American English conversation, Leech (1999) found familiarizers to be more frequent in American English, noting that British English relies more on kinship terms.

3. Corpus studies of TV dialogue

Studies of TV and movie dialogue have investigated a wide range of topics, such as issues related to dubbing and subtitling (Baumgarten 2008; Baños, Bruti, and Zanotti 2013; Lu 2023), gender roles and stereotypes (Bednarek 2015; Gregori-Signes 2017; Csomay and Young 2021; Li, Liu, and Liu 2022), or the way language is used to create characters (Reichelt 2018; Bednarek 2023). Many have compared scripted dialogue to unscripted language to see to what extent it differs from natural conversations, using various methods such as Biber's multidimensional approach (Quaglio 2008), frequency lists (Bednarek 2011), and n-grams (Bednarek 2012; Levshina 2017). They have found that TV dialogue is a close approximation of informal speech, but is more emotional and less vague that spontaneous speech

(Bednarek, 2012; Levshina, 2017). Heyd (2010) describes TV dialogue as "staged orality": like spontaneous speech, TV dialogue is oral, but it is designed by a team of writers and producers. Formentelli (2014) also highlights the dual nature of TV dialogue, specifically in the use of vocatives. On the one hand, it reproduces the interpersonal function and sociolinguistic variation of spontaneous speech. On the other hand, it uses sophisticated address strategies that allow for "authorial expressivity" (Formentelli 2014, 53). Tagliamonte (2005), who analyzed the use of intensifiers in the TV series *Friends*, points out that the series' dialogues reflect spontaneous language use, as it exhibits the same overall rate and distribution of intensification as similar corpora of the English language. She also suggests that TV dialogue is more innovative than the spontaneous speech of the general population in the use of the intensifier "so", "the new favorite in American English", and that it provides a "kind of preview of mainstream language" (Tagliamonte 2005, 296).

Corpora of TV and movie dialogue also lend themselves to diachronic studies. Some have used dialogue from a single series that spanned many years, such as *Star Trek* (Csomay and Young 2021), small corpora of movie dialogue (Forchini 2013), or parallel corpora (Formentelli 2014). The *TV Corpus* and the *Movie Corpus*, released in 2019, spawned a new wave of studies looking at the diachronic development of words, such as the use of the verbs "speak" and "talk" (Kang 2022), the suffix "-ish" (Eitelmann and Haumann 2023), and polite expressions and swear words (Jucker and Landert 2023). Landert, Säily, and Hämäläinen (2023) used the *TV Corpus* to identify words that appeared on TV earlier than their first date of attestation in dictionaries, noticing some encoding issues in the corpus and errors in the metadata, and emphasizing the need for manual verification of concordances.

Many studies of TV and movie dialogue have looked at features of orality, such as the expression "me likey" (Rodríguez-Abruñeiras 2022), the pragmatic marker "you bet" (Hirota and Brinton 2023), contractions, interjections, and discourse markers (Jucker 2021). Address terms have been the focus of several studies. Bruti and Perego (2010) analyzed the distribution of vocatives in seven movies and four TV episodes, coming to the conclusion that their frequency is genre-dependent. Heyd (2010) studied a corpus of the TV show *Friends*, focusing on the emergence of "you guys" as a second-person plural pronoun. Comparing the *Pavia Corpus of Film Dialogue* and the *Longman Spoken and Written Corpus*, Formentelli (2014) found that names, kinship terms, familiarizers, endearments, and insults were four times more frequent in film dialogue than in spontaneous speech. Quaglio (2009), who compared the language of the *Friends* TV show to the American conversation subcorpus of the *Longman Grammar Corpus*, found "guys", "man", "dude" and "buddy" to be a lot more frequent in the TV show that in natural conversation. Other studies of address terms have adopted a diachronic approach. In a small corpus of movies, Forchini (2013) noted a rise over time in the frequency of the familiarizers "man", "guys", "buddy" and "dude". Werner (2021) looked at the frequency of "dude", "buddy" and "bro" (among other terms) in the American portion of the

TV Corpus, noting their increasing presence in the TV dialogue and highlighting the rise in familiarity of American English.

4. Methods

4.1 The *TV Corpus*

The *TV Corpus* was created at Brigham Young University using texts taken from the OpenSubtitles collection, which were matched with IMDb pages providing metadata for each TV show (*The TV Corpus* n.d.). According to the metadata provided on the corpus page (https://www.english-corpora.org/tv/files/sources_ tv.zip), it contains 75,804 episodes from 2,988 series that aired between 1950 and 2017. Many series feature more than once in the corpus, as they span several years. The corpus is a sample of TV series: not all episodes of the series are included. The corpus contains on average 110.18 series per year ($SD = 165.30$), with a minimum of 1 series in 1950, and a maximum of 625 series in 2016. It consists of 326,201,276 tokens (or words), with a mean number of tokens of 4,797,078 per year ($SD = 6,958,599$), a minimum of 9,484 tokens in 1950, and a maximum of 25,077,851 in 2016. Figure 1 presents the number of tokens per year in the corpus. It shows that there is relatively little data in the first four decades of the corpus and that there is a tenfold increase in yearly corpus size between the early 1990s and the mid-2010s.
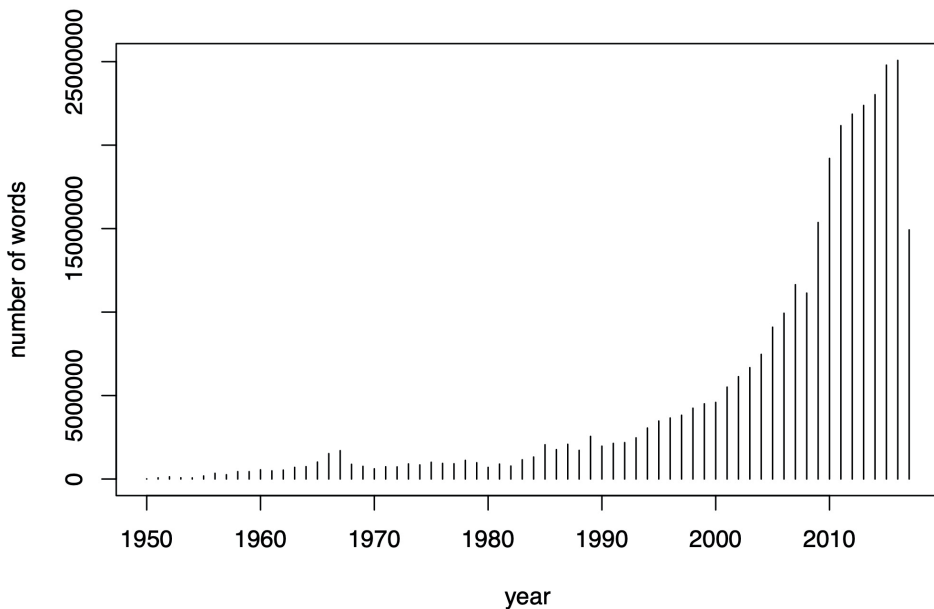
Fig. 1. Number of tokens per year in the *TV Corpus*

4.2 Data collection and processing

We used the free version of the corpus, which is available on the website English-corpora.org (*The TV Corpus* n.d.). Concordances were generated in January 2022 using the online interface, with four search terms: "dude", "dudette", "bro", and "sis". Concordance lines were then pasted into a .csv file, with the metadata provided by the online version of the corpus (year and title). We downloaded the .xlsx file provided on the English-corpora.org website which offers additional metadata associated with the texts in the corpus: number of words per series episode, language, country, genre, IMDb number, and runtime. The concordances (available on OSF: https://osf.io/rb2ez/?view_only=483c7270e7f048e386c7f5f a9fb6168b) were then merged with the metadata and analyzed with the software program R. All the frequency analyses presented in the article were carried out with R. We did not use the "chart" tool provided by the *TV Corpus* interface. Four series featured in the concordance lines and not in the metadata and were thus eliminated from the analysis. This explains the small discrepancies between the overall frequency of the four address terms provided by the online corpora and the results presented in this article. We manually examined the concordance lines for each search term and classified them into four categories: reference terms, address terms, verbs, and metalanguage:

– The "reference term" category contains occurrences where "dude", "dudette", "bro", and "sis" are used to refer to a person or a thing, as in "You bastards! You telling on our sis!" (*Skins* 2007) and "Just, like, a handsome dude in a classic sense" (*Happy Endings* 2011).

– The "address term" category comprises instances when the terms are used to address someone, as in: "I told you dude it's your citrus intake" (*Gilmore Girls* 2003) or "What does that say, bro?" (*The Voice* 2013). As address terms can sometimes develop into interjections and discourse markers (Sonnenhauser and Noel Aziz Hanna 2013), this category also very likely includes instances where the familiarizers are used as interjections. Because it is difficult to differentiate between both usages when looking only at the text, we did not create a special category for interjections.

– In the "metalanguage" category, the usage of the terms is discussed by the characters, for example as not being appropriate to address a person, as in: "Dude, bros don't even use 'bro'" (*Scrubs* 2006) and "I only call people in my crew 'Bro'. Bro and Bra, two totally different things" (*Kath and Kim* 2009).

– The "verb" category includes instances where the nouns become verbs through conversion, as in: "Segal and I bro'd out like crazy" (*Greek* 2011) and "Don't 'dude' me" (*The New Adventures of Old Christine* 2008).

In some cases, it was not possible, based on the text of the dialogue alone, to distinguish between address and reference term, as in "I know that dude!" (*Pinky and the Brain* 1998) or "How you gonna handle this dude? (*Dark Angel* 2001).

These occurrences were categorized as "unknown". We eliminated instances where the search terms are part of names of movies, bands, brands, and organizations, like in the following examples:

"Oh, that Ashton Kutcher movie. Right. He was so funny in 'dude, where's my car?'" (*Switched at Birth* 2013).

"Hey, George, what do you like better, the Bro or the Mansiere?" (*Seinfeld* 1995)

We then tallied the raw frequency of each term not per episode or series, but per "series-year". We created this text unit by concatenating the name of each series with each year it is included in the corpus. For example, the series-year *The Sopranos*-1999 comprises all the episodes of *The Sopranos* that came out in 1999 and are included in the corpus. *The Sopranos*-2000 contains all the episodes of *The Sopranos* that came out in 2000 and are included in the corpus, and so on. We had to proceed this way because the online interface of the *TV Corpus* only provides the name and the year of a concordance line, and not a unique identifier such as the episode name. We then computed the relative frequency of the terms for each of the 7,492 "series-years" we identified.

5. Results

5.1 "Dude"

42,593 occurrences of "dude" were found in the corpus, including 34,204 address terms, 8,247 reference terms, 4 verbs, 17 instances of metalanguage, and 121 unknown. The address term appears 10.49 times per 100,000 tokens, and the reference term 2.53 times. Figure 2 shows the relative frequency of "dude" as an address and reference term in the corpus, per year. "Dude" appears for the first time as a reference term in 1960. It was not used much until the mid 1980s. It was not used as an address term at all in 23 years of the corpus, mostly in the 1950s and 1960s, but also in the 1970s and 1980s. It was found in 3,466 (46.26%) series-year. The graph reveals an increase in frequency, starting in the mid-1980s, as well as two peaks: the first in the early 1990s, and the second a little before 2010. The frequency of "dude" more than doubles between 1995 and 2010, and reaches its maximum in 2010, with 17.70 occurrences per 100,000 tokens. The increase in frequency seems to mainly affect the use of "dude" as an address term, with a more modest increase in the frequency of the reference term.
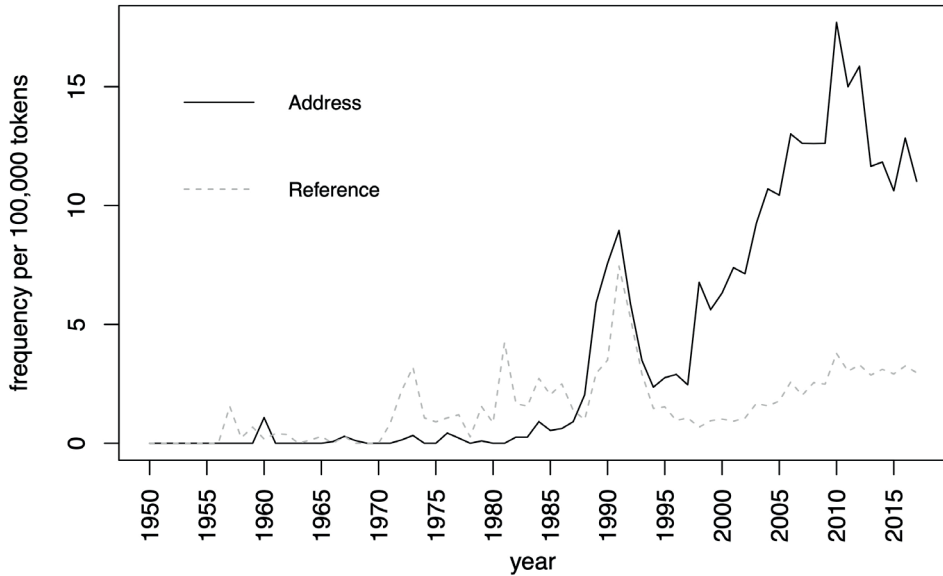
Fig. 2. Frequency of "dude" in the *TV Corpus*

When looking at this graph and at the other graphs presented in this article, it is important to remember that corpus size varies greatly, with later years of the corpus containing a lot more data than the first eight decades. Thus, individual series-year have a larger impact on smaller subcorpora. The first peak of the graph may in part be explained by the animated series *Teenage Mutant Ninja Turtles*. In 1991, for instance, 79.06% (151) of all occurrences of "dude" (191) in the year appear in this series, which represents 20.62% (103,528 tokens) of the data in the corpus for that year (2,135,182 tokens). The series, which features in the corpus from 1987 to 2016, consistently exhibits a large frequency of "dude" starting from 1989. However, its impact lessens in later years of the corpus, where it accounts for a smaller proportion of the data. In 2014, for example, "dude" has a relative frequency of 14.73 per 100,000 tokens in the series but the series only accounts for 0.20% (46,054 tokens) of the dialogue included that year (23,022,413 tokens). To distinguish between statistically significant and non-statistically significant variation, we used the "peaks and troughs" method. Described by Brezina (2018), it applies a Generalized Additive Model (GAM) to frequency data over time and is used to highlight significant outliers in a diachronic corpus. The resulting graph is presented in Figure 3. It shows that the frequency of "dude" is stable until the early 1980s and that it starts increasing, with a small dip in the mid-1990s and a dramatic increase that culminates in 2010.
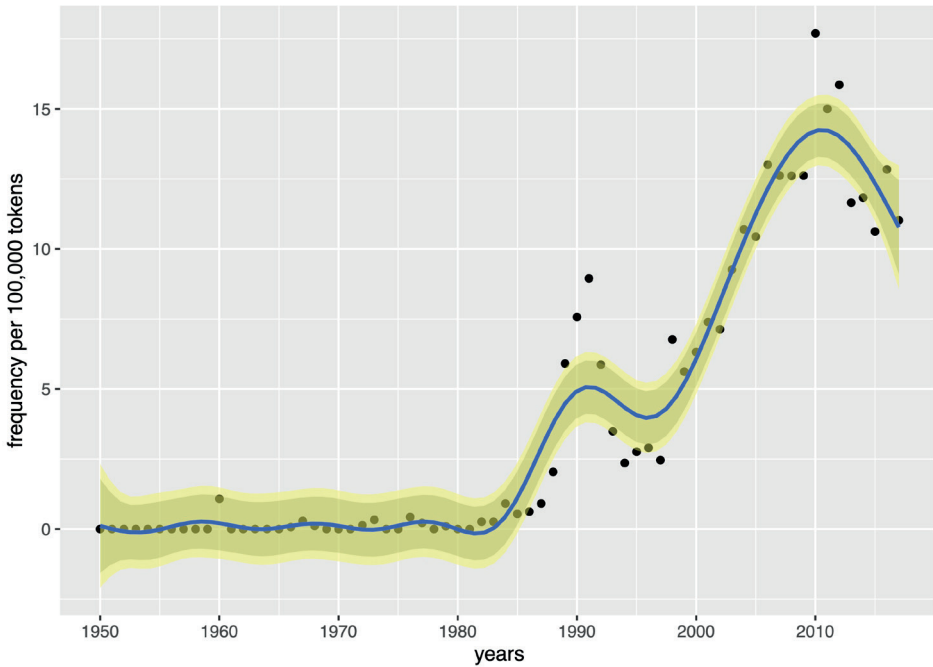
Fig. 3. Peaks and troughs analysis of the address term "dude" in the *TV Corpus*

5.2 "Bro"

"Bro" appears 11,173 times in the corpus, including 10,451 occurrences as an address term, 642 as a reference term, 44 in metalanguage, and 35 as a verb. It occurs 3.2 times per 100,000 tokens as an address term and 0.2 times as a reference term. It was used in 2,283 series-year (30.47% of series-year in the corpus). It appears for the first time as an address term in 1973 and as a reference term in 1985. It does not feature as an address term in 29 years of the corpus. While the frequency of the address term increases with time, the frequency of the reference term is close to zero in all years of the corpus (Figure 4). Peaks and troughs analysis (Figure 5) reveals that the frequency of the term does increase with time, starting in the mid-1970s. It also shows a number of outliers, corresponding to the points outside of the yellow area.
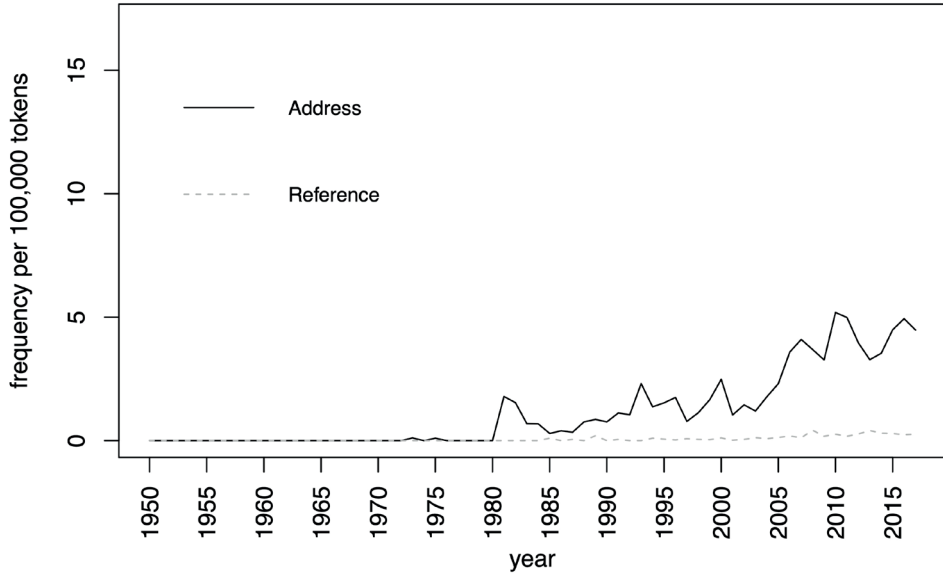
Fig. 4. Frequency of "bro" in the *TV Corpus*
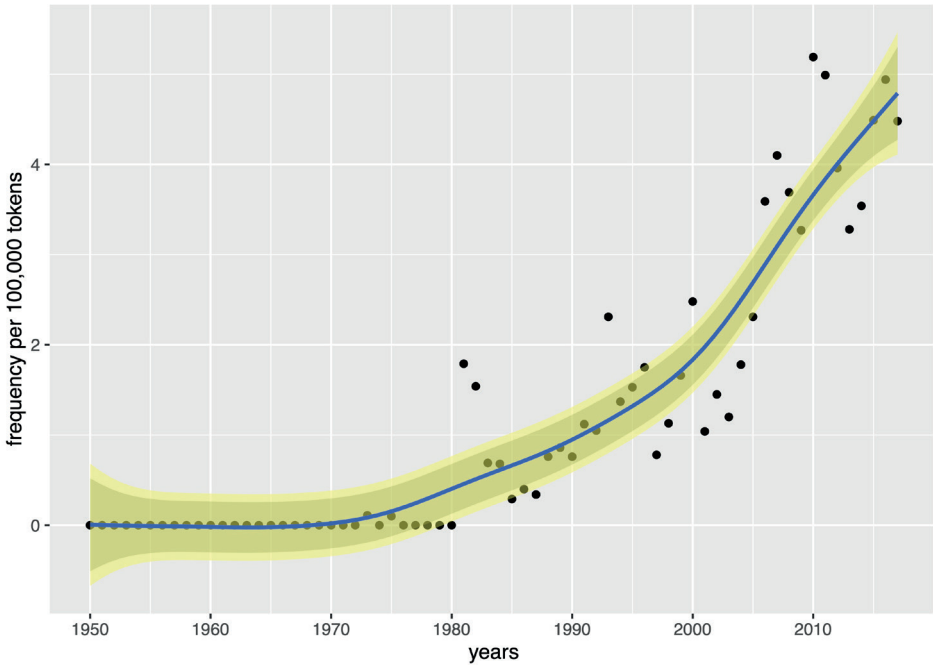
Fig. 5. Peaks and troughs analysis of the frequency of the address term "bro" in the *TV Corpus*

5.3 "Dudette"

We counted only 81 occurrences of "dudette" in the corpus, including 58 address terms and 20 reference terms. Consequently, the relative frequency of the term is close to zero, with 0.02 occurrence per 100,000 as an address term, and 0.01 as a reference term. Figure 6 shows its frequency through time in the corpus; the term was employed for the first time in 1981, as a reference term, in the series *Magnum, P.I.* "Dudette" only features in 14 series; one animated series, *Teenage Mutant Ninja Turtles*, is responsible for the bulk of occurrences, with 63 occurrences in total (14 as a reference term, and 49 as an address term), or 77.78% of all occurrences of the term in the corpus. These occurrences account for the peak represented in the graph, around the years 1991 and 1992. After this small spike, the frequency of the term drops and stays close to zero. Since "dudette" is quasi-absent from the corpus, we did not conduct further analysis of the term.
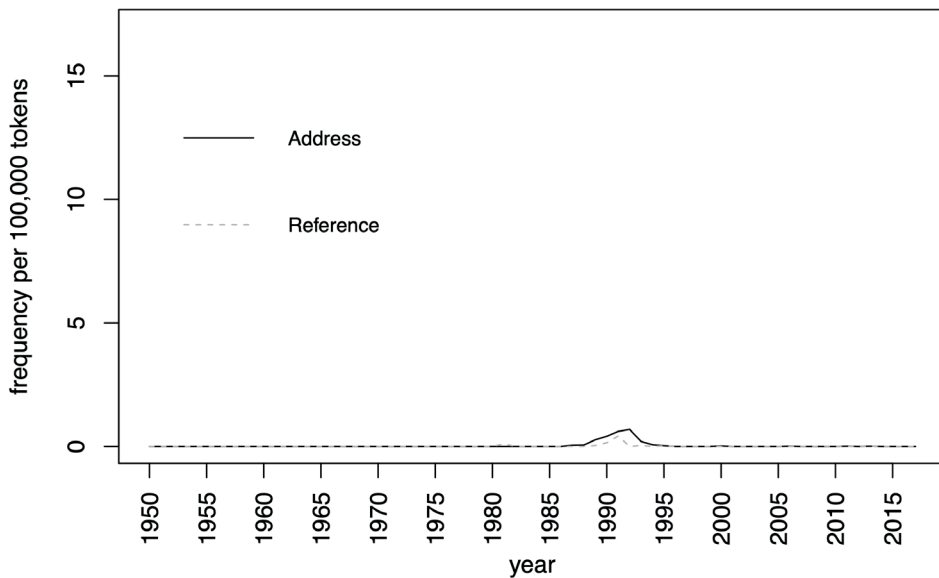
Fig. 6. Frequency of "dudette" in the *TV Corpus*

5.4 "Sis"

2,019 occurrences of "sis" were found in the corpus: it features 1,722 times as an address term, 290 times as a reference term, once as a verb, and twice in metalanguage. Its overall frequency per 100,000 is 0.62 (0.53 as an address term, and 0.09 as a reference term). Figure 7 shows its frequency through time as an address and

reference term. After the first recorded use of "sis" in the corpus, in 1956, the graph does not reveal any clear pattern. It does not indicate an increase in frequency, but several small spikes. As an address term, "sis" occurs in 197 series-year or 2.63% of the series-years in the corpus. As no clear pattern emerged from the descriptive statistics, we did not perform peaks and troughs analysis for the term.
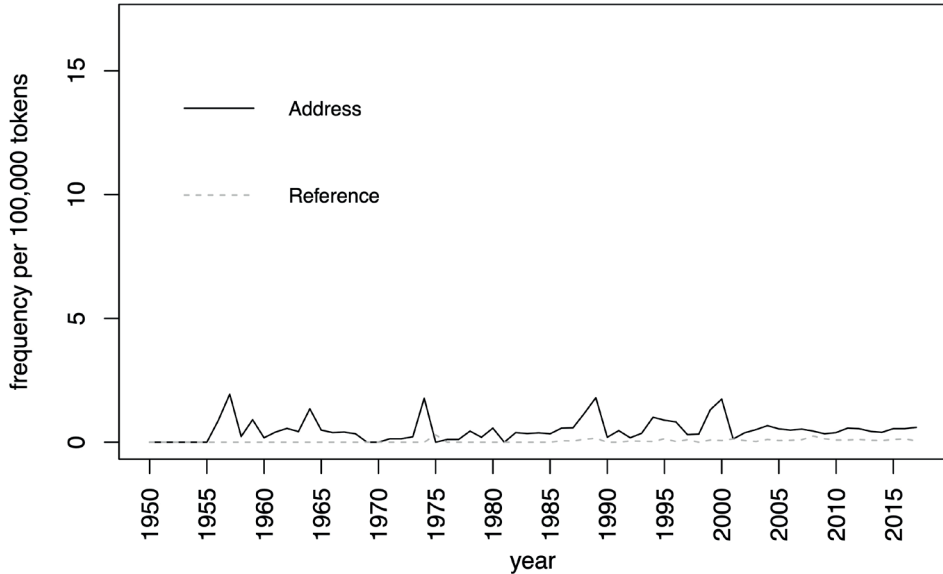
Fig. 7. Frequency of "sis" in the *TV Corpus*

5.5 All familiarizers

Figure 8 combines the line graphs corresponding to the frequency of each address term. It highlights the predominance of "dude" over the other three familiarizers. It also suggests that, even if "bro" is much less frequent than "dude", its diachronic trajectory seems to parallel that of "dude", with an increase starting in the early 1980s. "Sis", on the other hand, does not follow this trend.

5.6 Analysis by country

Three subcorpora were created, corresponding to the series produced in the US, in the UK, and in Canada. The US corpus is by far the largest. It is almost five times bigger than the UK corpus, and 14 times larger than the Canadian corpus. Table 1 presents the relative frequency of the three address terms in the corpus per 100,000 tokens. It shows that all address terms are more frequent in the US subcorpus than in the other two subcorpora, with "dude" being about ten times more frequent than in the UK. The three familiarizers are the least frequent in the UK subcorpus.
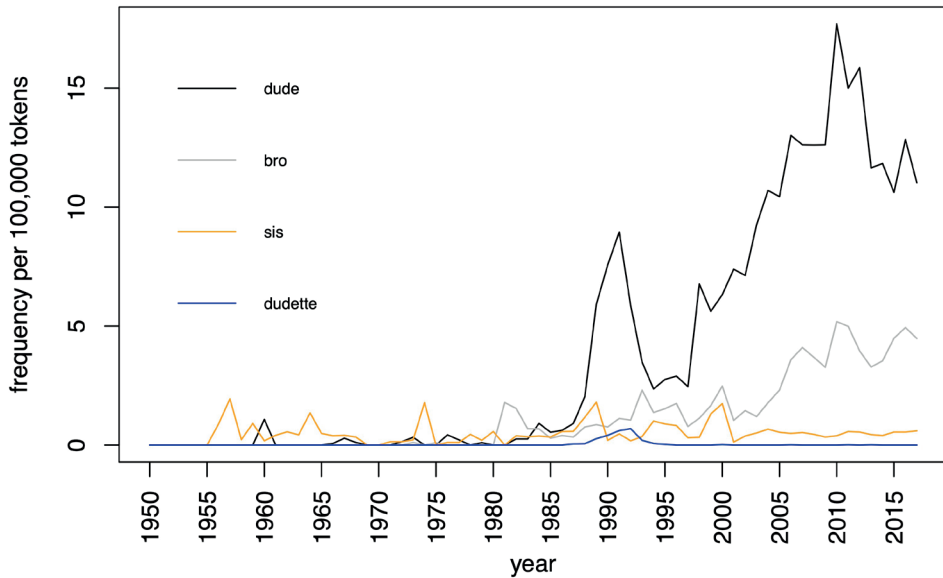
Fig. 8. Frequency of the four address terms in the *TV Corpus*

Table 1. Frequency of the familiarizers by country, per 100,000 tokens

	Tokens	Dude	Bro	Sis
US	243,674,852	12.77	3.84	0.55
UK	51,990,177	1.19	0.66	0.22
Canada	17,125,496	9.13	2.19	0.29

To find out if the differences between the three subcorpora are significant, we created negative binomial regression models, which are able to deal with the dispersion typical of corpus linguistics data (Hilbe 2011). The raw frequency of each address term is the dependent variable of each model; country and time were the predictors, and the number of tokens in each "series-year" was used as an offset. Since the Canadian subcorpus only contains very few series before the year 1995, we only considered data from 1995 to 2017. The results are presented in Table 2. Coefficients have been exponentialized (as is the case in the other models presented in this article). There is a positive and significant correlation between time and the frequency of "dude" and "bro", meaning that it increases with time. For "sis", however, the variable was not significant and was removed during the variable selection process, using the step() function in R. The models reveal significant differences between all countries, for all familiarizers. "Dude", "bro", and "sis" are significantly more frequent in the US subcorpus than in the other two subcorpora. The difference between the US subcorpus and the UK subcorpus is larger than that

between the US and the Canadian subcorpora. For example, the probability of the address term "dude" being used is 11.75 higher in the US corpus than in the UK corpus, and 9.15 times higher in the Canadian subcorpus than in the UK subcorpus. For "bro", the effect size is smaller: according to the model, it is 5.68 times more frequent in the US than in the UK subcorpus, and 3.46 times more frequent in the Canadian subcorpus than in the UK subcorpus. "Sis" is twice as frequent in the US subcorpus than in the UK subcorpus; the probability of it occurring in the Canadian subcorpus is 1.81 higher than it is in the UK subcorpus. It is also significantly more frequent in the US corpus than in the Canadian subcorpus.

Table 2. Regression models with countries and time as the dependent variables, with coefficient and confidence intervals (*p<0.05; **p<0.01)

	Dude	Bro	Sis
Intercept	0.000** (0.00, 0.00)	0.000** (0.00, 0.00)	0.000** (0.00, 0.00)
Canada	0.779* (0.64, 0.95)	0.609** (0.47, 0.79)	0.557** (0.36, 0.87)
UK	0.085** (0.07, 0.10)	0.176** (0.15, 0.21)	0.480** (0.36, 0.63)
Year	1.038** (1.03, 1.05)	1.076** (1.06, 1.09)	-

5.7 Analysis by genre

The *TV Corpus* metadata provides information about the genres of the series. Unfortunately, most series are classified as belonging to several genres, such as "Crime, Drama, Mystery" or "Action, Adventure, Drama". For this analysis, we decided to use only four categories: "Animation", "Documentary", "Reality TV" and "Scripted series", a category that includes all non-animated scripted shows in the database. This classification is based on the assumptions that the dialogue of reality television shows may be closer to authentic interactions than the dialogue of scripted series and that documentaries may contain less informal language than other genres. The category "Animation" was deemed relevant after our initial exploration of the corpus, which suggested that "dude" may be more frequently used in animated series, often geared towards children and teens. We used an automated method to extract data from the strings of genres provided in the corpus metadata: we extracted the first of the three genres under examination ("Animation", "Documentary", "Reality TV"), and classified all other series into the fourth umbrella category. To exclude the effect of country on our analysis, we only considered American texts. The relative frequencies of the familiarizers in the four subcorpora we created are presented in Table 3. It shows that "dude" and "bro" are more frequent in animated and in reality television series than in the other two categories. Animation also exhibits the highest frequency of "sis". As we expected, the frequency of the four address terms is the lowest in documentaries.

Table 3. Frequency of the familiarizers by genre

	Tokens	Dude	Bro	Sis
Scripted	209,823,804	10.53	3.44	0.54
Animation	16,117,503	37.56	7.27	1.15
Reality TV	10,967,036	23.67	8.32	0.24
Documentary	6,766,509	5.62	0.7	0.06

We created a negative binomial regression model to determine if the differences in frequency are significant, with time and genre as independent variables. As no reality television series are included in the corpus before 2000, we only considered US data dating from 2000. The results show significant differences between all genres. "Dude" and "bro" are more frequent in animated series than in other genres. They are also more frequent in reality television series than in documentaries and scripted series (other than animated series). "Sis" is also more frequent in animated series than in any other genre and more frequent in scripted series than in reality television and in documentaries.

Table 4. Regression models with genre and time as the dependent variables, with coefficient and confidence intervals (*p<0.05; **p<0.01)

	Dude	Bro	Sis
Intercept	0.000** (0.00, 0.00)	0.000** (0.00, 0.00)	0.000** (0.00, 0.00)
Animation	2.464** (2.12, 2.88)	2.011** (1.66, 2.45)	2.188** (1.58, 3.06)
Documentary	0.391** (0.30, 0.51)	0.167** (0.11, 0.25)	0.111** (0.03, 0.29)
Reality TV	1.653** (1.33, 2.08)	1.550** (1.19, 2.05)	0.339** (0.18, 0.62)
Year	1.017**(1.00, 1.03)	1.056** (1.040, 1.072)	-

6. Conclusions

Our study shows that "dude" is the most frequent of the four terms we analyzed, and that its frequency has increased dramatically over the past three decades, especially as an address term. The fact that "dude" may be becoming more gender-neutral (Kiesling, 2004; Pastorino, 2022) may account for its rise in popularity: it is no longer a word used only by men, to talk to men. The fact that, in our data, several series that exhibit the highest relative frequency of "dude" are series that mostly feature female characters (*Broad City*, *Kath and Kim*, *Girl/Girl Scene*) seems to support this. Like many other masculine terms, such as "man" or "guys", "dude" seems to have taken

on a generic meaning. "Dudette", on the other hand, seems to have known the fate predicted by Hill (1994), who described it as "artificial slang". Mostly used in one series, during a short period of time, it then disappeared from the corpus. Kiesling (2004) suggests that the lack of success of "dudette" has to do with the fact that it is a diminutive derivative of "dude" and has a negative connotation. The analysis of the pair "bro"/"sis" also reveals an asymmetry between the two address terms. Like "dude", "bro" rises in popularity over the years. However, this increase in frequency only concerns the address term, and not the reference term. In the *TV Corpus*, "bro" is less frequent than "dude", probably because the term indexes a specific type of masculinity. However, the term assumes a more generic meaning than "sis". The clipping of "brother" can be used to address a family member or a man, while, we hypothesize, "sis" is primarily used to talk to a speaker's sister. Again, looking at the series where "sis" is the most frequent supports our analysis. "Sis" is the most frequent in *Sonic Underground*, *Fantastic Four*, and *The Spoils of Babylon*, three series that depict fraternal relations (Sonic the Hedgehog and his sister Sonia, Lauoreighiya Samcake, Eric Jonrosh's sister in *The Spoils of Babylon*, and Susan Storm and her brother Human Torch in *Fantastic Four*). Thus, we conclude that not only is "sis" gender-specific, but it may also be mainly kinship-specific. This may explain why the frequency of the address term has remained stable since its appearance in the corpus: it has not taken any additional meaning other than "sister" or, if it has, this other meaning remains rare in television texts.

The analysis of the four genres shows that animated series use familiarizers more frequently than scripted series, documentaries, and reality television series. Since animated series are often geared toward children and teenagers, this confirms the connection between "dude", "bro" and teenage speech. Including reality television in our analysis was an attempt to find out if the frequency of address terms in scripted series reflects actual usage. It was based on the idea that since reality television shows are not scripted, they may reflect spontaneous speech more accurately. If we accept this hypothesis, then our results suggest that "dude" or "bro" may be more frequent in spontaneous interactions than in TV dialogue, since we found a significant difference. However, other studies such as Quaglio (2009) and Formentelli (2014) found that familiarizers are more frequent in TV dialogue than in spontaneous speech. Thus, it is possible that the high frequency of "dude" and "bro" in reality television texts may be due to the specific interactions of the reality television genre, which may not accurately reflect natural occurring conversations.

The comparison between the three varieties of English indicates, as we expected, that the familiarizers studied here are a feature of American English, and to a lesser extent of Canadian English. It confirms what Leech (1999) noted in a corpus of British and American conversations. Our analysis reveals a significant difference, but with a relatively small effect size, between Canadian and American English. This difference may be due to the nature of the texts included in each corpus. For instance, there may be more animated movies and reality

television shows in the American corpus, which could account for the difference. The increase in the frequency of "bro" and "dude" with time in the *TV Corpus*, and the fact that they are found more frequently in the American portion of the corpus than in other subcorpora, is in line with studies pointing to the rise of familiarity in American English which, according to Murray (2002), is driven by teenagers and young adults.

Finally, our study shows that caution must be taken when performing quantitative analyses of the *TV Corpus*, especially because of the smaller number of tokens included in the first four decades in the corpus, and because these early years feature a higher proportion of documentaries, which seem to use quite a formal language, than later decades. We have to remember that, like all diachronic corpora, the *TV Corpus* is, despite its large size, a "narrow lens that provides an insight into the language that has been preserved" (Brezina 2018, 222). Conducting inferential analyses is thus not sufficient to generalize the findings to a whole language variety.

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The Expression of Epistemicity in British Internet Discussion Forums in Contrast with Newspaper Opinion Articles and Political Speeches[1]

Abstract: This paper sets forth a quantitative analysis of expressions of epistemicity, a category covering the expression of commitment to the information transmitted, in a corpus of 25 threads extracted from British discussion forums. Epistemicity is divided into three categories: epistemic modality, evidentiality and factivity, each divided into subcategories. The results are analysed in contrast to comparable corpora of newspaper opinion articles and political speeches. The analysis uncovers significant differences in the expression of epistemicity in the three genres, in terms of both frequency and distribution across categories, the subcategory 'cognitive attitude' being a case in point. Epistemicity in the discussion forums is also proved to display features of orality and routinisation.

Keywords: epistemic modality, evidentiality, factivity, discussion forums, cognitive attitude, orality, routinisation

1. Introduction

This paper presents part of the research carried out in the STANCEDISC project,[1] aimed at the analysis of several dimensions of stance. Stance may be defined as the speaker/writer's attitude towards the information transmitted, not understood as an individual private opinion, but as "a linguistically articulated form of social action whose meaning is to be construed within the broader scope of language, interaction and sociocultural value" (DuBois 2007, 139). Stance has multiple dimensions, some of which are epistemic stance, effective stance and evaluative stance (Marín-Arrese et al. 2020, 270). This paper addresses epistemic stance (also called epistemicity), which concerns the speaker/writer's dialogical positioning in providing justificatory support for the communicated proposition (Boye 2012; Langacker 2013; Marín-Arrese 2015; 2021a; 2021b). Epistemic stance will be divided into three subtypes: evidentiality, which provides epistemic justification in terms of kind, source and/or evaluation of evidence; epistemic modality, which provides epistemic support by estimating the chances for a proposition to be or become true (cf. Nuyts 2001, 21);[2] and factivity, which concerns the factual assignment of a proposition. Throughout the paper, the label 'epistemic(ity)' refers to the larger category, while 'evidential(ity)', 'epistemic modal(ity)' and 'factive(ity)' refer to the respective categories. Evidentiality, epistemic modality and factivity are illustrated in examples (1), (2) and (3), respectively:

(1)   Reading your latest entries it **seems** <EP, IIE> you're up and down and you're drinking a bit more. (ENGF-06)[3]
(2)   BTW if you insist on ignoring what I've said so far, beg, borrow, buy, or steal a copy of "The Selfish Pig's Guide to Caring" by Hugh Marriott - it **might** <EP, EM> save your sanity, your caree's life, or even your life. (ENGF-04)
(3)   [BTW, I have a case involving a B-2 entry in 19-eighty-7 -- the government claims fraud as such: "You falsely stated you were coming to see your boyfriend. **The true fact** <EP, IFV> was that you had a home and job of three years in the United States you were returning to." (ENGF-25)

This paper reports the results of an analysis of a number of epistemic expressions in a corpus of English discussion forums, in comparison to other discourse types also covered in the STANCEDISC project, English newspaper opinion articles and political speeches, which have been analysed in Domínguez-Romero and Martín de la Rosa (2023).[4] The three genres compared have in common the British sources as well as an argumentative nature, in the sense that the main purpose of the writers is to present their opinion about controversial issues (see Section 2). The comparison aims at (dis)confirming two research hypotheses:

Hypothesis 1: epistemic expressions will be more frequent in discussion forums than in the other two genres. The reason is that political speeches and opinion

articles are explicitly delivered by non-anonymous professionals, who are supposed to be experts on the matters discussed and have to consider the ideology of the political party or the newspaper they are working for. By contrast, participants in discussion forums are anonymous and non-professional persons who need not know more about the issues discussed than the average person. A consequence of these differences is that participants in discussion forums have much fewer restrictions for expressing their voice than writers of political speeches or opinion articles. In the case of epistemicity, this lack of voice restrictions may lead to unashamed qualifications of commitment, as in example (4), extracted from a forum titled "The pros and cons of (alcohol) self-medicating", whose wording would be hardly conceivable in a political speech or newspaper opinion article:

(4)   Someone who helped me a great deal once told me that the only good thing that came from suffering with this is that we could understand and so know what to say to others.
I suppose <EP, CGA> it is an important benefit but **I think** <EP, CGA> I will only fully appreciate that when the pain is by. (ENGF-06)

The writer uses two expressions which explicitly mention the writer as conceptualiser of epistemic judgements overtly lacking total commitment to the communicated content. The observation of occurrences of this kind leads to the second hypothesis:

Hypothesis 2: expressions of cognitive attitude, which include first person constructions, such as *I think*, *I believe* or *I suppose*, will be significantly more common in discussion forums than in political speeches and newspaper opinion articles.

The choice of the genre of discussion threads is due not only to the hypothesised high number of epistemic expressions, but also to the importance of this genre nowadays, as a popular arena for social interaction which enables voicing opinion about controversial issues anonymously (Sánchez-Moya and Maíz-Arévalo 2023). Noticeably, a number of academic studies have covered threads about burning issues such as infertility (Lee 2017), partner violence (Sánchez-Moya 2019; Nacey 2020), eating disorders (Figueras-Bates 2015), or involuntarily celibate men 'incels' (Prażmo 2020), among many others.

The structure of the paper is as follows: Section 2 describes discussion forums and threads in terms of genre and register. Section 3 addresses the types of epistemicity and their subtypes. Section 4 describes the corpus and specifies the method of analysis. Section 5 presents and discusses the results, and Section 6 sums up the main conclusions.

2. Characterisation of discussion forums and threads in terms of genre and register

An internet discussion forum is an online discussion site where people hold asynchronous conversations in the form of posted messages. Discussion forums contain threads on different topics. Discussion threads may be considered a well-defined genre, in the systemic-functional sense of "a staged, goal-oriented, purposeful activity in which speakers engage as members of our culture" (Martin 1984, 25). The characterisation of threads in terms of the three elements of the definition, namely stages, goals and culture, is as follows:

1) As for stages, their schematic structure is simple at the highest level:
   Initiation (the initiator's turn) + Responses (all the following turns)

   Within the Responses, each contribution by a participant may be considered as a stage. Stages vary in internal complexity: a single stage commonly has more than one discourse function (for example, giving advice plus giving reasons for the advice), but their rhetorical structure lies outside the scope of this paper. Threads normally end spontaneously, not with a concluding turn, since such a turn would (most often impolitely) deter further contributions.

2) The goals of discussion forums are also clear. The initiator aims mainly at obtaining information or opinions about a given issue, and the other partici-pants aim at trying to help the initiator (and also other participants) by stating their opinions. In principle, participants have no other personal interests (such as getting money or favouring a given political party), although they may have subsidiary goals, such as receiving support or compliments about their view of the issue, which would enhance their need to be appreciated, i.e. their positive face in terms of Brown and Levinson (1987).

3) Concerning culture, discussion forums do not display national or cultural differ-ences in a comparable way to other kinds of genres such as marriage ceremonies or Christmas home parties. However, the present corpus was obtained from British sites (see Section 4), and some of the topics are British (for example, "Britain's drink problem" (ENGF-02) or "Is renting in the UK really that bad?"(ENGF-21)). The forums are open to all participants, having no restrictions of nationality or origin. Nevertheless, they may be said to have a certain 'British flavour', due to the sites, the most likely participants and some of the topics.

It must also be noted that discussion threads count as argumentative discourse rather than expository discourse, since the contributions concern controversial issues which do not lend themselves to unique viewpoints, rather than facts. In this

sense, the threads may be considered a dialogic genre, as participants are aware that their views of the issues in question need not coincide with those of other participants. However, participants wish their contributions to be appreciated. In this sense, discussion threads provide a good window to perceive the double nature of human beings (Weigand 2010, 47-48; Carretero 2014, 60). On the one hand, individuals need self-assertion; in this respect, anonymity provides a safe way for expressing personal opinions, even if they are unpopular or radical;[5] on the other hand, individuals are also social beings who need to respect others in order to be accepted in the community. Epistemic expressions are a powerful device for reconciling these different needs. This capacity is illustrated with example (5), extracted from the thread titled "Britain's Drink Problem":

(5)   *Participant 1:* Anyway, **I think** <EP, CGA> people who are not responsible enough to have a drink should not be allowed to drink at all.
      […]
      Participant 2: That would be completely unenforcable.
      […]
      Participant 3: You are **probably** <EP, EM> right. Although it wouldn't be practical to enforce such a law **I** still **think** <EP, CGA> there is a genius idea out there to combat anti social binge drinking that no one has mentioned yet. (ENGF-02)

The contribution by Participant 1 may be interpreted as giving priority to the need for self-assertion, since the idea is radical indeed, and uses *I think* to acknowledge that it is his/her opinion, and that not everyone shares this opinion. Participant 2 straightforwardly opposes the idea on the grounds that it is unenforceable, but Participant 3 uses epistemic expressions to assess the idea as not totally lacking common sense, thus fulfilling Participant 1's social need that his/her contribution should be considered.

The other two genres considered, newspaper opinion articles and political speeches, are also argumentative, since the writers' main aim is to present their viewpoints about given issues, acknowledging that there are other possible views but trying to persuade readers that the view they propose is better. However, these genres differ from discussion forums in that writers are not anonymous and are more conditioned by the lines of the corresponding newspaper or political party and also by the interest to acquire or maintain prestige in the institution they work for or belong to. Therefore, they are more cautious in the way they express their messages, which, I believe, will be reflected in the expression of epistemicity.

In terms of register, discussion threads may be characterised as follows by means of the dimensions of field, tenor and mode (Eggins 2004, 90–109):
–   As for field, namely the entity or activity about which the text is concerned, discussion threads are variable, since they cover different topics.

–   Concerning tenor, namely the social role relationships between interactants, participants may be considered to have equal power, with the caveat that, concerning expert power (Spencer-Oatey 2000, 33), the initiator may consider him/herself to be less knowledgeable or experienced about the issue in question than the prospective responders, thus considering them superior. There is no contact between participants, since they do not know one another, but they express affective involvement through the use of informal language.
–   With regard to mode, discussion threads are characterised as an instance of asynchronous computer-mediated communication (Marcoccia 2003).

3. Types of epistemicity

As stated in Section 1, epistemicity is approached as the speaker/writer's dialogical positioning in providing justificatory support for the communicated proposition (Boye 2012; Marín-Arrese 2021a; 2021b; Carretero, Marín-Arrese, and Lavid-López 2017; Marín-Arrese and Carretero 2022; Domínguez-Romero and Martín de la Rosa 2023). As stated in Section 1, epistemicity is divided into evidentiality, epistemic modality and factivity. In their turn, each of these categories is divided into subtypes. The division is as follows:

A)   The subtypes of evidentiality have been established according to the mode of access to the evidence (Marín-Arrese 2015; 2017; Carretero, Marín-Arrese, and Lavid-López 2017):

Indirect-inferential evidentiality (IIE). In this type, the mode of access to the evidence is indirect, through inferences by the speaker/writer based on their personal access to evidence. The evidence may be obtained through one or more evidential bases (Izquierdo-Alegría 2016, 64–67): perception, cognition, or (spoken or written) communication. Some expressions of IIE are certain occurrences of the verbs SEE, SEEM, APPEAR, LOOK and SUGGEST, the adverbs *evidently* and *obviously*, and the adverb *clearly* with evidential meaning, in contrast to the meaning of manner (as in "She spoke clearly").[6] An example of IIE is (6), extracted from a thread about trading with China:

(6)   I am sorry to say that too many people **seem** <EP, IIE> to forget that they are risking their own money and their own future in any new venture. (ENGF-09)

Indirect-reportative evidentiality (IRE). The mode of access is also indirect; it consists in epistemic justification based on communicative spoken or written messages, without further inference. IRE is difficult to distinguish from reported speech, understood as the attribution of information to an external communicative source with varying degrees of faithfulness. According to Chojnicka (2012), who

proposes a continuum between the two categories, the main aim of reported speech is the attribution of information to an external communicative source (with varying degrees of faithfulness), while the main aim of reportative evidentiality is to mark information as "coming from another speaker(s)" (2012, 173). In this paper, reporting verbs will be considered to be markers of reportative evidentiality only if the communicative source is not explicit, i.e. in the passive voice, as in (7), or with a non-specific source such as *people*, *everyone* or generic *they*.

(7)   I am waiting for an appointment to come through to get some therapy for myself to deal with all of the above, but **I've been told** <EP, IRE> the waiting list is very long (ENGF-03)[7]

B)   The expressions of epistemic modality are divided into the following subtypes:

Epistemic modality "proper" (EM), which consists in the expression of degrees of certainty for a given proposition to be or become true. Expressions of EM are the modal auxiliaries when they have epistemic meaning, and adverbs such as *certainly*, *probably*, *perhaps* and *maybe*:

(8)   Hi mate the CANTON FAIR is coming and there will have tons of suppliers attend it, **maybe** <EP, EM> you can find some sppliers at there,Just ask uncle google for some informations, It will start at the middle of April. (ENGF-09)

Cognitive attitude (CGA): the expression of beliefs regarding the truth of a proposition. Sample expressions of CGA are first-person occurrences of verbs of thought such as THINK, BELIEVE or SUPPOSE (see example (9)), and adverbs or adverbials such as *undoubtedly*, *no doubt, without doubt, presumably* or *supposedly*. The construction SEEM + *to me* has also been considered as CGA, since the explicitness of the conceptualiser makes it more akin to *I think* or *I believe* (Marín-Arrese, Carretero, and Usonienė 2022, 68–69).

(9)   **I think** <EP, CGA> we're the only people not having issues with CHC funding, as we've never even had to "fight our corner" regarding fees for anything care-related. **I do believe** <EP, CGA> the nursing home charges small fees for things like hairdressing, but this is to be expected and we're more than happy to pay for it. (ENGF-03)

C)   The subtypes of factivity are the following:

Personal Cognitive Factivity (PFV), which covers the expression of the speaker/ writer's strong commitment to the truth of the proposition, which is presented as

knowledge. The most frequent expression is the verb KNOW in the first person; other resources are expressions such as *I/we can tell/say*:

(10) **I know** <EP, PFV> in my heart of hearts that I myself am not ready for a new relationship because I would probably <EP, EM> end up hurting myself and the other person. (ENGF-07)

Impersonal Cognitive Factivity (IFV), which covers speaker/writer's commitment to the truth status of the proposition presented as a truth or fact. Sample expressions are *in fact*, *in truth*, *the fact/truth (is) that*…

(11) As a Christian yourself, you might appreciate that the teachings of Jesus were an improvement on the often barbaric traditions of the Old Testament (**in fact** <EP, IFV> they were so controversial at the time that they cost Jesus his own life!). (ENGF-01)

4. Data and method of analysis

4.1 The corpus

The corpus under analysis is part of the English corpus of discussion forums compiled in 2019 by Carmen Maíz-Arévalo and Alfonso Sánchez-Moya.[8] The corpus consists of posts extracted from different British sites from complete forum threads. The contributions were posted between 2006 and 2019. The following criteria were considered for the compilation:

– All the forums included the extension co.uk in their web address, in order to ensure that they belonged to the United Kingdom, with the caveat that it is not possible to guarantee that all the posts were sent from UK or by Britons. This feature favours comparability with the other two subcorpora, which were obtained from British newspapers and political parties.

– In order to comply with the ethical issues of privacy and anonymity, all the forums were publicly accessible and available, not password-protected, and the writers of the posts were anonymous.

– The maximum number of threads of the same forum is two, so as to prevent possible biases caused by the style of any specific forum.

– The threads have a wide range of different topics, such as social issues, business, culture, environment, education, immigration, sports and leisure, etc.

For the present paper, 25 threads have been selected, discarding the 'soft' topics of sports and leisure for the sake of comparability, since neither the opinion articles nor the political speeches have these issues as main topics. Sample titles of the selected threads are "Threatening gay marriage", "Britain's drink problem",

"Climate change and diseases" or "Tenancy deposit rules fixed". The total number of words of the texts are 96,256. The distribution of threads and words across topics is summarised in Table 1.

Table 1. Distribution of threads and words across topics in the selected corpus

Topic	No. of threads	No. of words
Society – Social issues	6	26,974
Business	2	20,049
Culture	3	14,476
Career	2	11,731
Environment	2	8,792
Immigration	2	5,119
Housing	2	3,168
Technology	2	2,548
Education	2	2,058
Wedding	2	1,341

The metadata of the selected threads are specified in the Appendix. In many cases, posts contain citations of previous contributions, which indicate the precise stretches of previous posts to which responses are addressed. These citations have been deleted for the quantitative analysis of epistemic expressions. The corpus without the citations totals 80,293 words.

4.2 Method of analysis

A search was carried out on a number of expressions (markers) of epistemicity, which, for the sake of comparability, coincide with those selected in Domínguez-Romero and Martín de la Rosa (2023) for the analysis of the English subcorpora of newspaper opinion articles and political speeches.[9] The search includes the following expressions:

A) Expressions from the domain of perception:
–   Verbs which may have the conceptualiser as Subject in the active voice: SEE and HEAR;
–   Verbs with constructions that impersonalise the perceiver: SEEM, APPEAR, LOOK (*like*) and SUGGEST ("this suggests that…");
–   the adverbs *apparently*, *clearly*, *evidently*, *obviously* and *seemingly*.
B) Expressions from the domain of cognition:
–   the verbs THINK, BELIEVE, SUPPOSE, DOUBT and KNOW;
–   the adverbs or adverbials *supposedly*, *presumably*, *no doubt*, *undoubtedly*, *without doubt*.
C) Expressions from the domain of communication:

-     the verbs SAY, TELL, REPORT, ALLEGE, CLAIM, SUGGEST;
-     the adverbs *allegedly* and *reportedly*.
D)   Modal verbs and adverbs:
-     modal auxiliaries: *must*, *may*, *might*, *could*;[10]
-     epistemic modal adverbs: *certainly*, *probably*, *perhaps*, *maybe*;
-     2 nouns of factivity: *truth* and *fact*.

The search on the expressions listed above was manual, for two reasons. Firstly, epistemic and non-epistemic occurrences had to be discriminated for many of the expressions. Examples of discarded occurrences were those of the modal auxiliaries with deontic or dynamic meanings, *clearly* with the meaning of manner, the verbs SEE and HEAR scoping over non-finite clauses (see Note 7), or non-clausal constituents (as in "a couple of friends went to see him in the pub", ENGF-02), the verb SAY introducing direct or indirect reported speech, or the verb KNOW occurring as part of the discourse marker *you know*.

Secondly, many expressions may belong to different categories, depending on the linguistic context. For example, the verb KNOW is a PFV marker when it categorises the information transmitted as knowledge and a CGA marker when it expresses limitation of knowledge, as in *I don't know* and *so far as I know*. In a similar fashion, the verb SAY belongs to the CGA category in (12) and to 1RE in (13):

(12) **I would say** <EP, CGA> it is risky buying from overseas manufacturers anywhere in the world, not just China. I'm sure you can find ligitimate manufacturers from Alibaba, but it's difficult telling the frauds from the ligitimate. **I would say** <EP, CGA> the only way to pay is via Paypal as they do provide some security. **I would say** <EP, CGA> avoid any company which doesn't have Paypal as an optional payment method. (ENGF-09)

(13) **It is** often **said** <EP, IRE> that carers are slaves ... slaves to the system perhaps <EP, EM> but ... not necessarily to their carees? (ENGF-03)

The actual expressions found for each type and subtype of epistemicity, together with the number of occurrences, are included in the discussion set forth in Section 5.

5. Results and discussion

This section presents and discusses the results of the analysis of epistemicity in the selected threads of discussion forums, in contrast to the subcorpora of newspaper opinion articles and political speeches. The first subsection (5.1.) covers the overall frequency of the epistemic expressions and their subtypes across the three genres; the following subsections (5.2. to 5.7.) describe the realisations of the

different subtypes of epistemicity in the discussion forums analysed, including observations about the occurrences of some expressions in the forums and in the other two corpora for comparative purposes.[11] The last subsection (5.8.) rounds off the discussion with an overall perspective of the findings.

5.1 Overall frequency of epistemic expressions and their subtypes

The total number of epistemic expressions in the discussion forums is 638. This frequency was compared with that of the corpora of newspaper opinion articles and political speeches by means of a one-sample chi-square test using the observed and expected frequencies on the basis of the null hypothesis of no preferential association. The results, specified in Table 2, confirm Hypothesis 1, since the differences in the distribution of epistemic expressions across the three genres are proved to be significant.

Table 2. Total number and expected frequencies of epistemic expressions in discussion forums, newspaper opinion articles and political speeches

	Discussion forums (80,293 words)		Newspaper opinion articles (100,699 words)		Political speeches (100,985 words)	
Epistemic expressions	Total no.	Expected frequency	Total no.	Expected frequency	Total no.	Expected Frequency
	638	469.27	654	588.53	356	590.20
	$\chi2= 160.88$, df = 2, p < .001					

These numbers, together with the respective ratios per thousand words (7.95 for discussion forums, 6.50 for opinion articles and 3.53 for political speeches), uncover that the difference between the frequency of epistemic expressions in discussion forums and opinion articles is much smaller than the difference between these two discourse types and political speeches. According to Domínguez-Romero and Martín de la Rosa (2023, 95), the abundance of epistemic expressions in opinion articles

> seems to imply the need to evoke a journalist conceptualizer who can better connect and engage with the readership through open statements (1) to accommodate the different views of readers and (2) share some responsibility with them while negotiating meaning.

Authors of posts in online forums seem to share this need to evoke the conceptualiser with journalists. Consequently, they both tend to perspectivise their messages as heteroglossic, in the sense that the locution is represented "as but one view among a range of possible views. […] to recognise that the text's communicative backdrop is a diverse one" (Martin and White 2005, 99). Epistemic expressions are a major

device for providing this heteroglossic perspective, by acknowledging that there are other possibilities apart from the one presented in the modalised clause.

The total number of epistemic expressions of different types across the three genres is specified in Table 3. According to the chi-square test of independence, the distribution displays significant differences. Especially remarkable is the frequency of CGA expressions in the discussion forums, whose occurrences almost double those in the political speeches and quadruple those in the opinion articles. Hypothesis 2 is therefore confirmed.

Table 3. Number of expressions of the different types of epistemicity in the three genres

Type of epistemicity	Discussion forums (80,293 words)	Newspaper opinion articles (100,699 words)	Political speeches (100,985 words)
	Total no.	Total no.	Total no.
IIE	105	127	30
IRE	17	27	5
EM	270	398	127
CGA	177	47	96
PFV	41	11	79
IFV	28	44	19
$\chi2= 273.53$, df = 10, p < .001			

The difference in the number of CGA expressions between the forums and the opinion articles is remarkable, considering that both genres share the need for heteroglossic statements. However, writers in both genres differ in the power relationship between them and their audience. As was stated in the Introduction (Section 1) and in the account of tenor provided in Section 2, participants in discussion forums may consider themselves as equals to their readers, while authors of opinion articles are supposed to have expert power (Thomas 1995, 127-128) over readers. For this reason, discussion forums contain more occurrences of expressions such as *I think*, *I believe* or *I suppose*, which confer a subjective flavour to the epistemic judgement due to the explicit mention of the writer. By contrast, authors of newspaper opinion articles tend to restrict the use of expressions of this kind. This finding agrees with Marín Arrese's (2017) claim that, in newspaper discourse, direct evaluations are avoided, more impersonal formulations being preferred.

Another fact worth commenting is that discussion forums do not display the lowest number for any of the categories, but always display either the highest or the second highest number. Therefore, the forums do not have poorly represented categories in comparison to the other two genres.

The three subcorpora share the distributional traits that EM is by far the most

frequent type and that IRE expressions are scarce. As for the remaining subtypes, the frequency of IIE expressions in the discussion forums and opinion articles is roughly similar, with ratios per thousand words of 1.31 and 1.26 respectively, and so is the frequency of IFV expressions, the respective ratios being 0.35 and 0.44. The number of PFV expressions in the discussion forums lies in the middle between the low number shown by the articles and the highest number of the political speeches, which agrees with the characterisation by Domínguez-Romero and Martín de la Rosa (2023: 96) of these speeches as "more reflective and personal" in comparison to newspaper opinion articles.

5.2 Evidential indirect-inferential expressions (EP-IIE)

The 105 occurrences of IIE in the forums are mostly realised by verbs. Within this word category, there is a strong predominance of verbs from the domain of perception that impersonalise the perceiver. The most common verb is by far SEEM, which totals almost half the occurrences: there are 60 cases of *seem, seems* and *seemed*, but no cases of *seeming*. The other verbs, APPEAR, LOOK and SUGGEST, display 9, 3 and 2 occurrences, respectively. This high frequency of verbs of this type for the expression of IIE is also present in the other two subcorpora.

As for verbs that may have the perceiver as subject in the active voice, SEE occurs 12 times. The conceptualiser is nearly always explicit, with 8 occurrences of *I see* and one of each of *I can see* and *I've seen*. No occurrences of *we see* were registered, which means that writers do not often include readers (or people in general) when making the conceptualiser explicit. There is only one occurrence of the verb SEE as IIE without explicit conceptualiser (*it's difficult to see*). The verb SEE is less common in the other two subcorpora (5 occurrences in the opinion articles and 4 in the political speeches), with only one occurrence in the first person singular for each subcorpus. This distribution provides additional evidence that participants in discussion forums are more prone to explicitly mention themselves as conceptualisers of epistemic judgements than authors of opinion articles.

The adverbs are comparably less frequent, the occurrences of *obviously*, *clearly* and *evidently* totalling 12, 8 and 1, respectively. The higher frequency of *obviously* in comparison to *clearly* makes a difference between the forums and the opinion articles, which total 16 cases of *clearly* and only 2 of *obviously*. This difference brings the discussion forums nearer spoken discourse, if we consider that, according to research on epistemic adverbs, *clearly* is more common in written corpora and *obviously* in spoken corpora (Carretero, Marín-Arrese, and Lavid-López 2017: 41-42; Rozumko 2019, 587). As for the political speeches, there are no occurrences of *clearly* and there is only one of *obviously*.

5.3 Evidential indirect-reportative expressions (EP-IRE)

The 17 occurrences of IRE in the discussion forums are distributed as follows: 7 of *apparently*, 5 of the verb SAY with generic subject or in the passive (*people say*, *they say*, *it is said*), 4 of TELL with the writer as subject of the passive voice (*I have been told*, *I was told*), and one with the verb SUGGEST (*research suggests*). Noticeably, no cases were found of the verb HEAR with reportative value, nor of *allegedly* and *reportedly.* According to Marín-Arrese, Carretero, and Usonienė (2022, 75), the two adverbs are much more frequent in newspaper discourse than in spoken discourse. This absence in the discussion forums may then be considered to bring them closer to spoken discourse in comparison to the opinion articles.[12]

5.4 Epistemic-modal 'proper' expressions (EP-EM)

The EM expressions, which constitute the most common group, are realised by the modal auxiliaries *must*, *may*, *might* and *could* and the epistemic-modal adverbs *certainly*, *probably*, *perhaps* and *maybe*. The total number of EM expressions is 270, of which 144 are adverbs and 126 are modal auxiliaries. The frequencies of modal auxiliaries and adverbs are specified in Table 4, which shows that the epistemic adverbs as an overall category are slightly more frequent than the modal auxiliaries.

Table 4. Number of EM expressions in the discussion forums

Expression	Discussion forums (80,293 words)
	Total no.
Must	14
May	49
Might	42
Could	21
Total epistemic modal auxiliaries	126
Certainly	15
Probably	57
Perhaps	24
Maybe	48
Total epistemic modal adverbs	144
TOTAL	270

Concerning the modal auxiliaries, *must* is less frequent than the three adverbs of lower probability *may*, *might* and *could*. It has to be noted, though, that epistemic *must* occurs 14 times in the discussion forums, but only 4 times in the newspaper opinion articles and never in the political speeches. This relatively higher frequency

of epistemic *must* in the discussion forums may be interpreted as one more feature that brings them nearer spoken language: according to Biber et al. (2002, 494), *must* in conversation is most often used to express logical necessity (i.e. epistemic modality), while in academic prose, this modal is more common with the meaning of personal obligation.

As for the adverbs, the most common in the forums is *probably*, which expresses medium commitment, followed by the low-commitment adverbs *perhaps* and *maybe*; the high-commitment adverb *certainly* is less common. In order to check whether this distribution is comparable to those of the opinion articles and the political speeches, a comparative quantitative analysis was carried out. The frequencies were submitted to the chi-square independence test (see Table 5), which proves the distributional differences to be significant. The totals show that *probably* registers the greatest cross-genre difference, and that all the adverbs are scarce in the political speeches and most frequent in the forums. As for the adverbs expressing lowest epistemic commitment, the forums prefer *maybe* over *perhaps* while the opposite is true for the opinion articles. Considering Rozumko's (2019, 588) observation that these four adverbs display a higher normalised frequency in the spoken than in the written part of the *British National Corpus*, the quantitative data once again provide evidence that discussion forums have a higher degree of orality compared to opinion articles.

Table 5. Frequency of the epistemic adverbs *certainly*, *probably*, *perhaps* and *maybe* in the three genres

Adverb	Discussion forums (80,293 words) 144 adverbs	Newspaper opinion articles (100,699 words) 98 adverbs	Political speeches (100,985 words) 16 adverbs
certainly	15	11	4
probably	57	18	3
perhaps	24	53	9
maybe	48	16	0
	$\chi2= 50.2898$, df = 6, p < .001		

5.5 Expressions of Cognitive Attitude (EP-CGA)

As for CGA, as was stated earlier, these expressions are significantly more frequent in the discussion forums than in the other two genres. The majority of the expressions specify the writer as the conceptualiser of the epistemic qualification: the most common expression is by far *I think*, which occurs 93 times as such and 125 times including other constructions with this verb, i.e. negative occurrences (*I don't think / I do not think*…) and alternatives such as *I really think*, *I still think* or *I like to think*. The expression of the category CGA may then be considered to

be highly routinised, with the overwhelming presence of *I think* resembling the results of Kärkkäinen's (2003) analysis of epistemic stance in American English conversation.

Other expressions which specify the writer as conceptualiser are *I would say / I'd say* (12 occurrences), *I believe* (7 occurrences, including affirmative and negative cases), *I suppose* (7 occurrences), *I don't know* (4 occurrences), *as/so far as I know* (3 occurrences), and other expressions occurring once or twice: *I suggest, I doubt, I'm not sure, I can't say, so far as I can tell, seems to me*. There is also an occurrence of the more creative expression *my head says*.

This frequency of the explicit conceptualiser in the first person singular contrasts with the few cases of explicit conceptualiser in the first person plural, with only 3 occurrences of *we think*. Also rare are the adverbials, with 4 occurrences of *no doubt* and one occurrence of each of *presumably, supposedly* and *undoubtedly*.

As for the expression of CGA in the newspaper opinion articles and political speeches, the expressions with explicit conceptualisers also play an important role within the category, according to Domínguez-Romero and Martín de la Rosa (2023, 83). Then, the cross-genre difference for this category is quantitative rather than distributional. As stated earlier, the higher frequency of these expressions in discussion forums provides evidence that participants in this genre are more inclined to formulate epistemic judgements explicitly indicating their role as conceptualisers than writers in the other two genres, especially in the case of the newspaper opinion articles.

5.6 Expressions of Personal Factivity (EP-PFV)

The most common expression of PFV is *I know*, which totals 27 occurrences out of the 41 PFV expressions; therefore, the expression of this category is also quite routinised. There are other 5 occurrences of the verb KNOW in the first person (*I just know, I was relieved to know, I do know…*). Another expression with the conceptualiser in the first person is *I can tell* (2 occurrences). Expressions with the conceptualiser in the first person plural total 7, thus being comparably more represented than in the category of Cognitive Attitude; these expressions include 4 cases of *we know* and one of each of *we also know, sometimes us non-gypsies know* and *those of my generation know*.

This predominance of the verb KNOW is also present in the genre of political speeches, where the category of personal factivity is almost twice as frequent as in the discussion forums, with *I know* and *we know* totalling 54 out of the 79 occurrences. The distribution of this verb in the two genres differs in that the political speeches display more cases of *we know* (30 occurrences) than of *I know* (24 occurrences).[13] It may be said, then, that KNOW in forums is more often used to signal the information given as personal knowledge; in political speeches, however, it serves more often to claim common ground, which often concerns the ideology or aims

of the corresponding political party. An instance of this use is found in example (14), extracted from a Labour Party speech, which shows the party's concern that children in disadvantaged environments should be provided with more opportunities to develop their potential.

(14) **We know** <EP, PFV> the earliest years are a crucial time to open up children's life chances. Yesterday I visited the Greenhouse nursery in Liverpool and heard their experiences. But across the country, nurseries can't make ends meet and youth clubs and nurseries are closing.

By contrast, the verb KNOW expressing factivity is scarce in the newspaper opinion articles, where *I know* and *we know* together only sum up 5 occurrences.

5.7 Expressions of Impersonal Factivity (EP-IFV)

This category, which totals 28 cases, is nearly always realised with the noun *fact*, with 12 cases of the discourse marker *in fact* and 14 occurrences including the noun *fact*, such as *the fact* (8 occurrences), *a fact*, *this is fact*, and other occurrences where the noun *fact* is premodified (*the mere fact*, *the true fact*, *a known fact*, *unfortunate fact*). The remaining 2 occurrences contain the noun *truth*: *in truth*, *truth be told*.

Concerning the frequency of *in fact* across the three genres, 13 occurrences were found in the newspaper opinion articles; its frequency is then higher than in the discussion forums in absolute terms, but proportionally lower within the realisations of the IFV category, which totals 44 occurrences. As for the political speeches, only 2 occurrences were found. This higher proportion of *in fact* in the forums than in the opinion articles may again be considered as a feature of orality, since its normalised frequency in the spoken part of the *British National Corpus* doubles that of the written part of this corpus (0.30 versus 0.15 occurrences per thousand words).[14]

5.8 Overall discussion of the results

The results of the analysis of the expressions of epistemicity carried out above have uncovered that, in the discussion forums, they display a slightly higher normalised frequency than in the opinion articles and a much higher normalised frequency than in the political speeches. In addition, all the subcategories of epistemicity are well represented in the forums in comparison to the other two genres; in fact, the forums did not display the lowest frequency for any of the subcategories under analysis.

This richness of epistemic expressions in the forums across categories seems

largely due to a number of features that characterise this genre. One of these features, which forums share with opinion articles, is the need felt by writers to opt for open statements rather than categorical statements in order to connect and engage with the readership by accommodating different worldviews. This feature is not so obvious in political speeches, in which writers tend to defend their worldviews more straightforwardly and unashamedly, influenced by the ideology and/or interests of the corresponding political party. This difference accounts for the higher frequency of IIE and EM expressions in the forums and opinion articles than in the political speeches, since the expressions included in these categories mostly express tentative epistemic qualifications with medium or low commitment to the information transmitted.

A second feature, which discussion forums seem to share with political speeches but not so much with opinion articles, is the need to opt for expressions that highlight personal reflection. This difference accounts for the higher numbers displayed by the CGA and PFV categories for the forums and political speeches than for the opinion articles. However, there are differences between the forums and the political speeches in the distribution of these two categories. In the forums, CGA expressions are more than four times as frequent as PFV (177 vs. 41 occurrences); this is due to the need felt by participants to have an open approach to different worldviews, which lead them to strongly prefer *I think* over *I know*. Moreover, the forums contain many more occurrences of the explicit conceptualiser in the first person singular than in the first person plural, which indicates that participants favour the presentation of their worldviews as their own rather than as shared with other readers. By contrast, in the political speeches CGA is still more frequent than PFV, but the difference is much smaller (96 vs. 79 occurrences), which is coherent with the need to display adherence to the worldviews advocated by the corresponding political party; these views are often presented as common ground using the first-person plural expression *we know*.

A third feature of the expression of epistemicity in the discussion forums is its stronger resemblance to the expression of epistemicity in spoken discourse in comparison to the other two genres, even if political speeches are written to be spoken. Two kinds of evidence point towards this consideration. Firstly, some categories are realised very frequently by one or two expressions, while the other expressions are much less common; this distribution indicates a high degree or routinisation (cf. Kärkkäinen 2003): examples of frequent expressions are the verb SEEM for IIE, *I think* for CGA, *I know* for IFV and *in fact* for PFV. And secondly, the discussion forums display a higher number of expressions proved by other research to be more common in spoken language than in written language: the distribution of expressions in the category EM is a case in point, due to the comparably higher frequency of epistemic *must* and of the adverbs, in particular *probably*.

6. Conclusions and suggestions for further research

This paper has set forth a quantitative analysis of epistemic expressions in discussion forums, and contrasted the results with those of comparable corpora of newspaper opinion articles and political speeches. The main findings are summarised as follows:

1. The number of epistemic expressions in the corpora of the three genres has displayed significant quantitative differences, which, together with the highest ratio per thousand words displayed by the discussion forums, has confirmed Hypothesis 1: epistemic expressions are more frequent in discussion forums than in newspaper opinion articles and political speeches. It must be noted, though, that the difference between forums and political speeches is much larger than that between forums and opinion articles.

2. The quantitative analysis has also uncovered significant distributional differences between categories of epistemicity across the three genres. In particular, cognitive attitude (CGA) expressions are overwhelmingly more common in the forums than in the other two genres. Therefore, Hypothesis 2 has also been confirmed.

3. Discussion forums have also been proved to display epistemic expressions of all the categories; this distribution seems due to the coexistence of two needs felt by participants, one of which is shared with each of the other genres under analysis. Writers in discussion forums share with authors of opinion articles the need to present their worldviews openly, acknowledging other possible positions, and they share with writers of political speeches the need to sound reflective and personal.

4. The frequency of epistemic modal adverbs has displayed significant differences between the three genres, the highest number corresponding to the forums. Concretely, the adverb of medium commitment *probably* is overwhelmingly more common in the forums than in the other genres.

5. Epistemic expressions in discussion forums have been proved to display features of orality, concretely routinisation and abundance of linguistic devices associated with spoken discourse, to a higher extent than the other two genres.

   The similarities and differences found between the epistemic expressions in the three genres under consideration lead to predict the fruitfulness of prospective comparative analysis by adding comparable English corpora of other types of argumentative discourse, such as letters from readers in newspapers, essays of diverse kinds (scientific, philosophical, theological…), legal texts (judgements, appeals…) or commercial advertising speech. The research could also be extended to corpora collected in other Anglophone countries or to other languages.

Notes

1 The full reference of the project is specified in the Acknowledgements.

2 Throughout the paper, the terms *true* and *truth* are used considering human limitations of access to reality, through our bodies and minds.

3 The coding of the texts consists in the acronym ENGF, which means "English Forums", and a number assigned for each text. The annotation system (with angle brackets) contains the label EP for epistemicity, followed by another label corresponding to the subtype of epistemicity (see Section 3). Throughout the paper, the examples quote extracts from the forums in the original form, with no correction of errors of grammar, spelling or punctuation.

4 Domínguez-Romero and Martín de la Rosa's paper includes comparative analysis across languages (English and Spanish) and ideologies (conservative and progressive). The present paper includes only one ideological consideration, included in Section 5.6.

5 See, for instance, the 'incel' forums analysed in Prażmo (2020).

6 In a number of references (Lampert, 2015; Musi and Rocci, 2017; Carretero 2020), the epistemic meaning of *clearly* is considered as epistential, on the grounds that it has an evidential component of conclusive evidence and an epistemic modal element of strong commitment to the truth of the proposition. Following the lines of Domínguez-Romero and Martín de la Rosa (2023), in the present paper epistentiality is not considered as a category and epistemic *clearly* is included in evidentiality.

7 There is another kind of evidentiality, direct perceptual evidentiality (DPE), which indicates direct access to visual or some other sensory form of evidence. In English, direct perception is most often expressed by categorical statements without explicit evidential markers. An example with an explicit expression of DPE would be *I see you're crying* when the speaker is witnessing the event. In the discussion forums, no instances of DPE were found. There are a few cases of the verb *see* followed by a non-finite clause, such as (1) below:
(1) Do shop around, as **I've seen** a lot of people on here say they've had custom rings which have been surprisingly well-priced. (ENGF-18)
However, following Boye (2012, 285-286) the present approach does not consider these cases evidential on the grounds that the verb SEE scopes over a state of affairs (which can be said to occur, not to have a truth value), while evidentiality always scopes over a proposition (which has truth value).

8 For a description of the whole corpus see Sánchez-Moya and Maíz-Arévalo (2023), where it is analysed in terms of evaluative stance.

9 Two papers with a similar selection of markers are Marín-Arrese (2021a, 2021b).

10 The modal auxiliaries *will* and *would* can also express epistemic modality, but were not included in the model, given the complexity of their semantics (see, for

example, Coates 1983; Carretero 1995) and their high number of occurrences in all the discourse types. *Should* and *ought to* have also been excluded, for the reason that they do not frequently express epistemic modality (Coates 1983).

11   The quantitative data about newspaper opinion articles and political speeches have been extracted from Domínguez-Romero and Martín de la Rosa (2023) and, for a number of specific expressions, from the English corpora used in said paper.

12   In terms of Stefanowitsch (2006, 62), this absence of *allegedly* and *reportedly* is accidental rather than significant, since the occurrence of these adverbs in discussion forums is not ungrammatical, nor is it pragmatically inadequate *per se*. In fact, a small number of occurrences (for example, one case of each adverb) instead of total absence might still have been considered as a feature bringing the forums closer to spoken discourse in comparison to the opinion articles.

13   A remarkable difference was found between the speeches of the two parties under analysis: *I know* is more common in the speeches of the Conservative Party, and *we know* in those of the Labour Party.

14   The calculation was carried out by the author, using the *BNC World Edition*, rounding off the total number of words of the written and spoken components to 90 million and 10 million words respectively.

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Appendix:

Metadata of the discussion forums and threads under analysis. The word count includes citations of previous contributions.

GENRE	SOURCE	URL	TITLE	DATE	WORDS	CODE
FORUM-SOCIETY	FORUM-TALK-UK. COM	1	Threatening Gay Marriage	05-09-2012	5118	ENGF-01
FORUM-SOCIETY	FORUM-TALK-UK. COM	2	Britain's Drink problem.	05-09-2006	7626	ENGF-02
FORUM-CAREER	CARERS UK FORUM	3	Mental Exhaustion	06-06-2019	6447	ENGF-03
FORUM-CAREER	CARERS UK FORUM	4	Tips for Newbie carers	28-12-2015	5284	ENGF-04
FORUM-SOCIAL ISSUES	SANE FORUM UK	5	What If I Just want To Stay In Bed All Day	02-11-2018	1808	ENGF-05
FORUM-SOCIAL ISSUES	SANE FORUM UK	6	The pros and cons of (alcohol) self medicating	06-10-2018	9001	ENGF-06
FORUM-SOCIAL ISSUES	GINGERBREAD FORUM	7	2 years on from divorce	13-03-2019	2629	ENGF-07
FORUM-SOCIAL ISSUES	GINGERBREAD FORUM	8	Single parent dad looking for groups in Birmingham	27-06-2019	792	ENGF-08
FORUM-BUSINESS	UK BUSINESS FORUMS	9	Is buying from China risky?	16-01-2013	8143	ENGF-09
FORUM-BUSINESS	UK BUSINESS FORUMS	10	What will difference will President Obama Make?	04-11-2008	11906	ENGF-10
FORUM-CULTURE	THE LITERATURE NETWORK FORUMS	11	Which is your favorite Dickens novel?	27-05-2019	5898	ENGF-11
FORUM-CULTURE	THE LITERATURE NETWORK FORUMS	12	The trend of adapting classic novels into musicals	13-09-2011	5537	ENGF-12
FORUM-ENVIRONMENT	CLIMATE DEBATE FORUM	13	What about the sinking islands?	09-10-2015	8139	ENGF-13
FORUM-ENVIRONMENT	CLIMATE DEBATE FORUM	14	Climate change and diseases	09-01-2018	653	ENGF-14
FORUM-EDUCATION	PHD DISCUSSION FORUM	15	To PhD or not to PhD	16-07-2008	765	ENGF-15
FORUM-EDUCATION	PHD DISCUSSION FORUM	16	PhD loans – what do you all think?	11-05-2018	1293	ENGF-16
FORUM-IMMIGRATION	FORUM FOOTBALL. CO.UK	17	Is Crime in UK getting out of control?	21-07-2017	2589	ENGF-17

FORUM-WEDDING	HITCHED.CO.UK/CHAT/FORUMS	18	Wedding ring dilemma	26-05-2019	443	ENGF-18
FORUM-WEDDING	HITCHED.CO.UK/CHAT/FORUMS	19	Family fall out	19-06-2019	898	ENGF-19
FORUM-HOUSING	House Price Crash Forum	20	Tenancy Deposit Rules Fixed	19-05-2012	1189	ENGF-20
FORUM-HOUSING	House Price Crash Forum	21	Is renting in the UK really that bad?	28-12-2017	1979	ENGF-21
FORUM-TECHNOLOGY	TechRepublic Forums Smartphones	22	Do more expensive smartphones last longer than cheaper ones?	10-06-2019	776	ENGF-22
FORUM-TECHNOLOGY	Tom's Hardware Forum	23	Discussion Mac vs. Windows	19-02-2019	1772	ENGF-23
FORUM-CULTURE	BRITMOVIE FORUM	24	Original Memories of Films on TV	23-04-2019	3041	ENGF-24
FORUM-IMMIGRATION	BRITISHEXPATS.COM	25	Immigration Fraud - Just Don't Do It	05-08-2009	2530	ENGF-25

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6. http://www.sane.org.uk/support_forum/viewtopic.php?f=4&t=33781
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Figurative Conceptualizations of Nations, Countries, and Institutions in Newspaper Articles on Migration

Abstract: The paper discusses figurative conceptualizations of nations, countries, and institutions as either A CONTAINER, A PERSON, A SINKING SHIP, A FABRIC, or HELL in media discourse on the European migrant crisis. Applying Steen et al.'s (2010) three-dimensional model of metaphor analysis, we analyze a specific set of metaphorical linguistic expressions, which are inextricably related in the segments of the real discourse on migration, to discuss their rhetorical power and communicative function. The aim of this paper is to describe and identify cases when these are used as perspective-changing devices to influence readers' opinion on an important issue such as migration.

Keywords: Deliberate Metaphor Theory, deliberate metaphor, media discourse, migration discourse

1. Introduction

A conceptual metaphor is a cognitive device where the more concrete, or physical, domain (the source domain) is used to comprehend the more abstract one (the target domain). Kövecses (2010, 23) lists the concepts SOCIETY and NATION among the most common target domains, which are "abstract, diffuse, and lack clear delineation; as a result, they "cry out" for metaphorical conceptualization". He (2010, 23) points out that, due to their complexity, these concepts call for metaphorical understanding in terms that they are comprehended using more familiar and simpler concepts. Thus, nation is commonly construed figuratively as A PERSON, THE HUMAN BODY, A CONTAINER, FABRIC, A SINKING SHIP, A HEAVEN/HELL, etc. The choice of these source domains that we have at our disposal depends on which aspect(s) of the target domain NATION we want to highlight.[1] Different source domains are, however,

exploited to highlight different aspects of nation as to suit our rhetorical goals. For instance, Grady (1997a, 54) points out that a feature of fabric which maps onto societies is

> the tight, multidirectional *interdependence* of the many parts which make up its structure. To say that a society is *unraveling* is to say that the many parts of which it is composed (people and subgroups) are no longer organized in the same way or to the same degree. These changing relations are more difficult to describe using the SOCIETY IS A BUILDING compound, since erect physical structures do not embody the same principles of symmetrical interdependence.

The conceptual metaphors NATION AS A PERSON, NATION AS THE HUMAN BODY, NATION AS A CONTAINER, NATION AS FABRIC, NATION AS A SINKING SHIP, and NATION AS HEAVEN/HELL may be more or less clichéd, more or less frequent, but the fact is they serve to help comprehend different aspects of the concept of NATION. Kövecses (2010, 24), for instance, provides a set of examples of NATION being conceptualized as a person (*neighboring* countries, a *friendly* nation) and the human body[2] (the *ills* of society), where human qualities are assigned to things that are not human. In other words, COUNTRY/SOCIETY/NATION is personified in terms that we are selecting different aspects of a person, human interaction, ways of looking at a person, etc. to comprehend this target domain. Such conceptualizations "allow us to make sense of phenomena in the world in human terms – terms that we can understand on the basis of our own motivations, goals, actions, and characteristics" (Lakoff and Johnson 1980, 34).

Musolff (2010) claims that the exploitation of STATE IS A BODY/A PERSON metaphors by the contemporary media is "linked to culture-specific theories or ideologies." Thus nations are attributed the undesirable human properties and behaviors in order to build more convincing arguments that support our ideological worldviews. The countries are sometimes described as 'cooperating on good terms' or acting 'selfishly' to protect themselves amidst the crisis. They may employ the social unity against 'the others' as a form of defensive mechanism from migration.

Social unity may also be metaphorically referred to as a fabric of a society (cf. Charteris-Black 2011; Grady 1997a; 1997b; Bošnjak 2020). Patterns of relationships among social groups, i.e. social networking, is seen in terms of a textile with often complex warps and weaves, which evokes wholeness (Santa Ana 2002, 316). The issues may arise when this conceptualization of a society as a fabric implies social exclusion (the insider/outsider entailment). Some groups may be depicted as a threat to social unity due to the ideological claim that different groups of foreigners pose a threat not only to group identity conceptualized as closeness (using the concept of FABRIC), but also to the so-called 'group effectiveness' because the prevailing stereotype is that the ideal nation is made up of people of the same race, culture, language, and values (Goatly 2007, 192).[3] As people feel that these national

determinants are endangered by the mass migration and multiculturalism, and that the social fabric of their community is fraying (cf. Papademetriou 2012, 1), the countries enforce more rigid policies and the backlash against migration.

The country constantly exposed to new arrivals of 'others' is often conceptualized as a pressurized container (cf. the 'container metaphors' in Lakoff and Johnson 1980, 29–31) with distinct boundaries that delineate those on the outside from those inside. This is a basis for segregation of migrants as outsiders that want to enter the container with a limited capacity. The increase in the number of migrants is actually the increase of the pressure inside to bursting point (cf. 'space-container' scenario in Musolff 2015, 45). This is the case with all the European countries, but what is specific for the UK is that "Britain's geographical status as an island encourages perceptions of it as a container: in right-wing political communication its walls are represented as ideally strong and rigid but as under constant threat of perforation and rupture - and therefore in need of continuous support and reinforcement" (Charteris-Black 2006, 575).

The most common metaphorical portrayal of a nation endangered by migration is to conceptualize it either pressurized or flooded by the arrival of migrants (cf. Santa Ana 2002; Mujagić 2018). According to Santa Ana (1997, 321), the concept of a sinking ship is assigned to the domain of DANGEROUS WATERS, i.e. the conceptual metaphor MIGRATION IS DANGEROUS WATERS, within which the factors of volume, movement, and control influence migration process and "the crush of illegal immigrants" into the country, which is then likened to "overloading the lifeboats of a sinking ship". It is only logical that the image of a country as a sinking ship is terrifying in the eyes of its citizens, but securing the place at that metaphorical lifeboat is possibly the only chance for migrants to reach the desired location, which they consider their safe haven. That safe place, i.e. a country that migrants want to reach, is often conceptualized as HEAVEN. Opposed to that, migrant camps on migrant routes are conceptualized as HELL.[4]

The described set of metaphors indicates that there is a powerful rhetorical link between the concepts which we have at our disposal to metaphorically portray a nation or a country facing migration crisis and institutions responding to the crisis. This framework evokes powerful emotions, such as fear and the desire for protection. Previous research, however, does not strictly focus on the rhetorical effects these metaphors have regarding a more specific discourse topic. As geopolitical and social situation changes, it is necessary to discuss how nations, countries, and institutions are structured by metaphor in the context of recent social phenomena, such as the European migrant crisis. Indeed, migration discourse has been a subject of numerous books and linguistic papers in recent years, but this paper investigates a specific set of metaphorical linguistic expressions excerpted from newspaper articles on migration. It is studied through the lens of newly devised theory (the Deliberate Metaphor Theory, henceforth, the DMT) and refined, objective methodological framework (the three-dimensional model of metaphor analysis. Moreover,

we give insight into the ways the authors frame the migration process itself, as well as how they write about what are supposed to be 'countries of transit' (such as Greece) and 'countries of destination' (the UK). On the other hand, we gain insight into how recipients perceive the topic, as well as how metaphors are used as perspective-changing devices. To our knowledge, the concepts of nations, countries, and institutions affected by migration have not been the main focus of previous studies of metaphor in migration discourse to which this particular methodological framework is applied.

In section that follows, an overview of applied methodology is given. Subsequently, examples extracted from the analyzed newspaper articles are grouped according to the source domains they belong to and presented in different sections (hence a CONTAINER metaphor, a PERSON metaphor, A SINKING SHIP metaphor, a FABRIC metaphor, and HELL metaphor). This analysis is followed by the concluding remarks in section 8.

2. Research methodology

In order to analyze metaphors in segments of real discourse, we rely on one of the most objective, reliable and detailed models of metaphor analysis proposed by Steen (2010; 2015). His three-dimensional model of metaphor analysis distinguishes three dimensions of metaphor: the linguistic dimension of (in)directness, the conceptual parameter of conventionality, and the communicative dimension of (non)deliberateness. Each of these dimensions serves as the basis for analysis of metaphor at the next level (thus linguistic, conceptual, and communicative levels of analysis). Potentially metaphorical expressions are identified by applying the MIPVU procedure devised by Steen et al. (2010). The MIPVU, the six-step procedure for identifying metaphorical linguistic expressions (i.e. linguistic metaphors at the first level of the aforementioned Steen's three-dimensional model) is explained in detail in Steen et al. (2010, 25-26). The MIPVU instructs an analyst to determine the basic and contextual meanings of an expression by consulting dictionaries. For instance, in the sentence "Small shops help to maintain *the fabric of neighbourhood life*." (*Macmillan*), the expression *fabric* is identified as potentially metaphorical and is looked up in dictionaries. The basic meaning of *fabric* is "cloth, especially when it is used for making things such as clothes or curtains" (*Macmillan*), while its contextual meaning is "the basic structure of a society or organization" (*Macmillan*). These meanings are compared and contrasted in order to determine the level of similarity and distinctness between the two.[5] Therefore, MIPVU procedure is a reliable tool to confirm whether the expression is indeed metaphorical, and serves as the basis for further analysis at the linguistic level.

After establishing that the identified expression is indeed metaphorical, an analyst proceeds to determine whether it is indirect, direct, or implicit metaphor.

The guidelines to determining the type of metaphor at the linguistic level are given in Steen et al. (2010, 33; 38–40) and Krennmayr (2011, 51-52; 58–60). Indirect metaphors imply the indirect use of language when one speaks about one concept in terms of another, i.e. when one tries to conceptualize one phenomenon in terms of another. The metaphorical linguistic expression *fabric* identified in the sentence above is an example of indirect metaphor use – where a concrete concept is used to comprehend more abstract concept of social unity. On the other hand, direct metaphors refer to the use of overt lexical units, which nevertheless activate cross-domain mapping. Direct metaphors are identified as local referent and topic shift, or the incongruous expressions integrated within the overall referential and/or topical framework through comparison (Steen et al. 2010, 38). Also, certain lexical signals, i.e. signals of potential cross-domain mappings (cf. Steen et al. 2010, 40) may point to metaphorical use of language (e.g. *like*, *as*, *as if* are metaphor signals). One such example of direct metaphor provided by Steen et al. (2010, 93) is: "He's *like a favourite old coat*" – where a cross-domain comparison between a person and a coat is expressed directly at the level of linguistic form (signaled by *like*). Apart from A IS (LIKE) B type of direct metaphor, Steen (2007b; 2008; 2009a) describes another type of direct metaphor, the so-called *extended metaphor*, which includes creative instances of figurative language use. When it comes to implicit metaphor, Steen et al. (2010, 39) point out that it "does not have words that clearly stand out as coming from an alien domain. It comes in two forms, implicit metaphor by substitution and implicit metaphor by ellipsis." They (2010, 39) provide the following examples:

> 'Naturally, to embark on such a step is not necessarily to succeed immediately in realising *it*.' Here *step* is related to metaphor, and *it* is a substitution for the notion of 'step' and hence receives a code for implicit metaphor.
> When a text displays ellipsis and still conveys a direct or indirect meaning that may be explained by some form of cross-domain mapping from a more basic meaning or referent than the contextual meaning recoverable from the presumably understood lexical units, insert a code for implicit metaphor ('implicit'). An example is *but he is,* which may be read as *but he is [an ignorant pig]*, when that expression is taken as a description of a male colleague discussed before. The verb *is* may be coded as a place filler by the code <MRW, impl>.

After the linguistic level analysis is completed, we proceed with metaphor analysis at the conceptual level, which involves the conceptual parameter of conventionality, i.e. establishing whether the identified metaphorical linguistic expression is conventional or novel, and whether it belongs to a conventional or novel conceptual metaphor. This means that the parameter of conventionality refers to linguistic expressions as well as to conceptual domains. For example, a metaphorically used expression *pig* (as in, e.g. *ignorant pig* above) has the basic meaning "a pink or

black animal with short legs and not much hair on its skin" (*Collins*), and the contextual meaning "If you call someone a pig, you think that they are unpleasant in some way, especially that they are greedy or unkind." (*Collins*). The fact that this contextual meaning has entered dictionaries means that it is entrenched, clichéd way of describing certain type(s) of people. This means that the metaphorical linguistic expression *pig* is conventional. Furthermore, it belongs to the conventional conceptual metaphor HUMAN AS ANIMAL.[6] The same applies to the expression *fabric* mentioned above: it is conventional metaphorical linguistic expression belonging to the conventional conceptual metaphor. On the other hand, novel metaphors are metaphorical linguistic expressions whose contextual meanings are not listed in dictionaries. As an example, Kövecses (2010, 36) cites the song 'The Road Not Taken', in which Robert Frost uses the conventional metaphor LIFE IS A JOURNEY in an unconventional way. In other words, conceptual metaphor is conventional, but metaphorical linguistic expressions are not. In contrast, it is difficult (but not impossible) to find conventional linguistic expressions for an unconventional conceptual metaphor. Lakoff and Johnson (1980, 139) give a new, unconventional conceptual metaphor LOVE IS A COLLABORATIVE WORK OF ART, but they do not cite any conventional metaphorical linguistic expressions to substantiate their example. However, Kövecses (2010, 36) does give LIFE IS A MIRROR as an example of a novel conceptual metaphor: "Life is a mirror. If you smile, it smiles back at you; if you frown, it frowns back."

The linguistic and conceptual levels of metaphor analysis serve as a firm basis and meet the challenge of identifying a deliberate metaphor in communication (Steen 2007a; 2008; 2011a; 2011b; Steen et al. 2010). At the communicative level of metaphor analysis, the cases "when language users attempt to take voluntary control over the way they use metaphor for highlighting and hiding in expression, conceptualization, and communication" (Steen 2017, 2) are identified. Those are the cases when language users provide an alien perspective on the topic of utterance, and "the addressee has to move away their attention momentarily from the target domain of utterance or even phrase to the source domain that is evoked by the metaphor-related expression" (Steen 2015, 68). At this level, the IDeM protocol (Krennmayr 2011, 154-155) is used to identify instances of deliberate metaphor use. We determine "whether the metaphorical expression that has been identified by MIP/MIPVU is meant to change the recipient's perspective on the topic of the text" (Krennmayr 2011, 154). Deliberate metaphors imply the use of certain types of signals (quotation marks, direct metaphor signals) or innovative language (novel metaphors, and extended metaphors).[7]

> Using different types of signals for deliberate metaphor leaves room for the manipulation of concepts and signals, using different discourse strategies to achieve the desired rhetorical effect. By deciding what to emphasize with signals or what concepts to elaborate on creatively, the author manipulates the addressee in a certain way, influences their reasoning and change of perspective (Mujagić and Berberović 2019, 31).

In the example sentence above, metaphorical linguistic expression *fabric* is neither signaled nor in the A IS (LIKE) B form; it is not novel, and does not participate in a wordplay. Thus, it is an example of non-deliberate metaphor use (according to the IDeM protocol criteria). On the other hand, *He is an ignorant pig* and *like a favourite old coat* are direct metaphors and automatically considered to be instances of deliberate metaphor use.

The corpus in this paper[8] is analyzed in accordance with the model elaborated above. The examples are retrieved from newspaper articles and columns about the European migrant crisis, published by *The Guardian*, *Daily Mail*, and *Daily Express* in the period from the beginning of August 2015 until the end of March 2016. The dictionaries used to annotate the texts from the British newspapers were *Macmillan Dictionary*, *Collins Cobuild Online*, *Oxford Dictionary Online,* and *Cambridge Dictionary Online*. After the three-level analysis, the metaphors identified in the corpus were quantified, taking into account the number of metaphorical linguistic expressions to obtain a statistical overview presented below:

Table 1. Source domains

Target domain	Source domain	Metaphorical linguistic expressions	Total
A NATION / COUNTRY / INSTITUTION	PERSON	*suicide* (19), *architect* (1), *social worker* (1), *shoulder* (4), *good shape* (1), *coalition* (2), *damned duty* (1), *nervous crisis* (1)	30
	CONTAINER	*pressure* (1), *full* (2), *pressurised* (1), *pressure cooker* (1)	5
	FABRIC	*fabric* (7), *patchwork* (1) *sharper knife* (1)	9
	SHIP	*rearranging the deck chairs on Titanic* (1)	1
	HEAVEN	*living hell* (1)	1
			46

Table 2. Overview of metaphors according to the three-dimensional model

Linguistic level – Linguistic metaphor	Expressions in the corpus	total
Indirect metaphor	*good economic shape* (1), *pressure* (1), *immigration pressure cooker* (1), *fabric* (7), *sharper knife* (1), *pressurized* (1), *shoulder* (4), *full* (2), *suicide* (19), *coalition* (2), *damned duty* (1), *nervous crisis* (1)	41
Direct metaphor	Examples of A IS B type: London is a *patchwork* of ghettos, „*Living hell*", *architect*, *social worker*; Creative: *rearranging the deck chairs on the Titanic*	5

Implicit metaphor		0
Conceptual level- Conceptual metaphor		
Conventional metaphor	*shoulder* (4), *good economic shape*, *pressure* (1), *immigration pressure cooker*, *full* (2), *fabric* (7), *patchwork*, *sharper knife*, *pressurized*, *architect*, *suicide* (19), *coalition* (2), *damned duty* (1), *nervous crisis* (1), *rearranging the deck chairs on the Titanic*; *living hell*	45
Novel metaphor	*social worker*	1
Communicative level		
Deliberate metaphor	*rearranging the deck chairs on the Titanic* (creative), „*living hell*" (direct, quotation marks included=signaled), *patchwork* (a is b type), *social worker*, (a is b type, novel), *architect* (a is b type), '*coalition*' (2), '*damned duty*' (1), (signaled)	8
Non-deliberate metaphor	*shoulder* (4), *good economic shape*, *pressure* (1), *full* (2), *fabric* (7), *sharper knife*, *pressurised*, *suicide* (19), *nervous crisis* (1), *pressure cooker*	38

We focus on a specific set of metaphorical linguistic expressions[9] used in newspaper articles to talk in figurative terms about nations, countries, and institutions involved in the European migrant crisis. These are then conceptualized as either A PERSON, A CONTAINER, A SINKING SHIP, A FABRIC, OR HELL. However, the paper approaches their description in terms of their communicative function in newspaper texts, whereby the rhetorical effects of their (non-)deliberate use in migration discourse are considered.

3. The CONTAINER metaphor

As mentioned above, the country to which migrants come is often conceptualized as a container – which is already full and still under the pressure of invasive forces from both the outside and inside. According to Kövecses (2010, 22), force may take many forms in the physical world (waves, wind, storm, fire, and agents pushing, pulling, driving, or sending another thing) and effect various changes on things it acts on in various ways. In this regard, it may be said that migrants are represented as a different spectrum of forces to show their harmful effects. The first thing that is under the direct action of force (or forces) is a state border (i.e. the edges of a container). The constant arrival of migrants creates pressure on the borders of the country they come to, which is then presented as a pressurized container on which the force acts in two ways. First, the force acts from the inside because a significant number of migrants has already entered the country. Second, the force acts from the outside because a large number of migrants is waiting at the borders to enter the already overcrowded country (the full container). Given

the encyclopedic knowledge that a container bursts when a force acts on its edges and/or surface, the recipient expects the European borders to burst at some point as well. Facing such a difficult situation, the EU and its members are conceptualized as pressurized containers using, for instance, conventional metaphorical linguistic expression *pressure cooker*:

(1)   The piecemeal unilateral moves being taken across Europe – this week alone Hungary, Belgium, and Austria announced solo moves on immigration curbs – are adding to the sense of chaos and impotence in the EU and are turning Greece into Europe's *immigration pressure cooker*. ("Europe braces for major 'humanitarian crisis' in Greece after row over refugees", *The Guardian*, February 25, 2016)

The basic meaning of *pressure cooker* is "a deep cooking pan with a tight lid that allows the pressure of steam to cook food quickly" (*Macmillan*). The following descriptors related to the basic meaning of *pressure cooker* are found in the dictionaries: 'quickly' (*Oxford, Collins, Cambridge*), 'under steam pressure' (*Oxford*), 'using steam at high pressure' (*Collins*), 'above the normal boiling point of water' (*Collins*). Its contextual meaning refers to "a highly stressful situation or assignment" (*Oxford*), i.e. "a difficult situation in which people have to work very hard or experience a lot of strong emotions" (*Macmillan*). This is an example of indirect metaphor at the linguistic level of analysis. Furthermore, we checked the use of *pressure cooker* on Google and found that it is used not only in the context of the European migrant crisis, but also in media discourse on migration in e.g. 1998, 1999, 2013, and 2017. Thus, the metaphorical expression *immigration pressure cooker* in example (1) is marked as a conventional, or established way of talking about migration. Metaphorically speaking, if a container (usually a country, but in our example, the EU – a political and economic union consisting of 27 member states) is left unattended (lacks control of the number of migrants), its edges (the union borders) may burst, which results in its destruction (a complete cessation of its functioning). In (1), 'countries of destination' (Hungary, Belgium, and Austria) are announcing stricter policies as they believe the force (migrants) acts from outside to pressurize the container. On the other hand, 'country of transit' (Greece) is metaphorically presented as an already full container.

According to the IDeM protocol, this is an example of non-deliberate metaphor. But this does not mean its effects are harmless. The effect of indirect metaphors in our cognitive system is covert – unlike the direct use of language, where the use of signals for direct metaphor is overt.

4. The PERSON metaphor

The metaphorical linguistic expressions from PERSON domain that are identified in the corpus refer either to body parts (e.g. *shoulder*) or physical and mental actions taken by humans (*willingness*, *duty*, and *suicide*), as well as mental states (a *nervous* crisis).

(2) And yet the alleged inability to provide adequate care to asylum seekers landing in Kent, or locked up in Yarl's Wood, masks what is perhaps a much deeper ethical lapse: the failure to resettle significant numbers of refugees directly from the Middle East, and the expectation that Middle Eastern countries should instead *shoulder* the refugee burden themselves. ("The shame of the migrant shed masks a deeper scandal," *The Guardian*, March 8, 2016)

(3) In mid-February, the German government confidently presented a plan in which a "*coalition of the willing*" – including Austria, Germany, Sweden and the Benelux trio – would take 300,000 refugees from Turkey a year. ("EU-Turkey summit to focus on stemming flow of migrants to Europe," *The Guardian*, March 6, 2016)

(4) It has been clear for some time that the appetite for redistribution quotas in Europe was minimal, he said. "The so-called '*coalition of the willing*' involving France that German politicians talked about for a while has turned out to be practically non-existent." ("EU-Turkey summit to focus on stemming flow of migrants to Europe," *The Guardian*, March 6, 2016)

(5) Even last week, she said in an interview on German television that it was her "*damned duty*" for Europe to find a common path. Asked if she had a plan B for the Brussels summit, Merkel responded with a passionate: "No, I don't." ("EU-Turkey summit to focus on stemming flow of migrants to Europe," *The Guardian*, March 6, 2016)

(6) "Europe is in the midst of a *nervous* crisis, primarily for reasons of political weakness," the prime minister told top cadres in his Syriza party on Sunday. ("Refugee bottleneck in Greece leads to warning of humanitarian crisis," *The Guardian*, March 6, 2016)

(7) Behind all the manipulative propaganda about the plight of the refugees the reality is that the open-door approach amounts to a form of *suicide* for Europe. ("Mass immigration will destroy the European Union," *The Daily Express*, September 24, 2015)

Moreover, the conventional metaphorical linguistic expression *to be in a good shape* in the example below makes manifest the conventional conceptual metaphor STATE AS A PERSON. In this particular case, the author refers to several countries having something in common (the Netherlands, Austria, Denmark, Norway, Sweden, and Finland, thus the use of 'they'):

(8)   What are the problems in the Netherlands that help build these rightwing populist movements? It is one of the richest countries in the world – the same with Austria, Denmark, Norway and the same now with Sweden and Finland. Perhaps it is the idea that because they are in *good economic shape*, you might be in danger of losing something. I do not fully understand it. ("EU may have to limit migrant benefits like UK, says Hamburg mayor", *The Guardian*, March 1, 2016)

The basic meaning of (*good*) *shape* is "good physical condition" (*Oxford*), i.e. "how healthy or fit someone is" (*Macmillan*), and its contextual meaning is "the condition of something, especially in relation to its ability to be effective or successful" (*Macmillan*). It is a conceptual metaphor within which the country's economic status is metaphorically presented as health condition of a person (the so-called 'economic metaphors'), i.e. economic systems and/or economic institutions are conceptualized as human beings. According to Kövecses (2010: 68-69), it is "possible to think of neighboring countries as 'neighbors,' who can be friendly or hostile, strong or weak, and healthy or sick. Strength corresponds here to military strength and health to economic wealth. This metaphor has certain implications for foreign politics. A country can be identified as strong and another as weak."

The metaphorical linguistic expression *architect* identified in (9) is conventional at the conceptual level, but it is direct metaphor of A IS B type at the linguistic level and thus classified as deliberate metaphor at the communicative level.

(9)   The march towards a federal superstate was meant to usher in a new era of prosperity and solidarity. Instead it has brought only division, fear, wreckage and despair. What we are now facing is suicidal destruction masquerading as compassion. The European Union is the chief *architect* of the present migrant crisis. With wilful contempt for the people of Europe, Brussels promoted the idea that nationhood is a danger and patriotism a vice, while the removal of frontiers has been seen as a central task on the way to the creation of the superstate. ("Opening national borders has been an abject failure", *The Daily Express*, September 3, 2015)

Macmillan provides the following basic meaning of *architect* – "someone whose job is to design buildings", and the contextual meaning as follows "the person who has the idea for something such as a plan or policy and makes it happen". In the context of the European migrant crisis, *architect* implies that the EU is the creator of the current situation, i.e. that the migrant crisis is a construct of the EU. Using this metaphorical expression, the author of the article implies that the EU has caused this situation in some way – it has created its migration policy and now (as an architect) it should have a valid action plan and strategy for its realization.

In (10), the metaphorical linguistic expression *social worker* is a direct metaphor of A IS B type at the linguistic level, a novel metaphor (the conceptual level), and a deliberate metaphor at the communicative level.

(10) Furthermore the EU's obsession with free movement has totally emasculated the forces that should be protecting European societies, such as the police and army. Once they were our guardians. Now they act as ferry services and tour guides for the migrants. With its usual grandiosity, the EU has also encouraged the theory that we are the world's *social worker*, bearing responsibility for the planet's suffering masses. How many does the EU think we should allow to settle here? All 120 million of the world's displaced people? All two billion of those who, according to the United Nations, are living under oppression? We are always told by the ideologues about the joys of mass immigration, how much it boosts our economy and enriches our society. ("Opening national borders has been an abject failure", *The Daily Express*, September 3, 2015)

Macmillan lists only one dictionary entry, i.e. only the basic meaning of *social worker* – "someone who is trained to give help and advice to people who have severe social problems". The absence of a semantic entry in the dictionary means that this contextual meaning is not conventionalized, i.e. that the metaphorical expression *social worker* in (10) is novel. It is, therefore, novel (at the conventional level).

5. The SINKING SHIP metaphor

The expression *rearranging the deck chairs on the Titanic* identified in (11) is used metaphorically in the sense "engaged in futile or ineffective actions" (*Collins*), i.e. "used for saying that someone is wasting time dealing with things that are not important, and is ignoring much more serious problem" (*Cambridge*). It is an example of indirect, conventional metaphor.

(11) It is not just women. Men across Europe are also and understandably getting angry but it might just be the female vote that pulls us out of the EU. The Prime Minister is often accused of ignoring women's issues and he certainly seems to be now, *rearranging the deck chairs on the Titanic* while doing nothing to protect the half of the population with XX chromosomes. When those migrants in Germany gain the right to settle there they will also gain the right to move here. If Mr Cameron can't do something about that then referendum or no, the European project is over. It may already be too late. ("Assaults on women will bring down EU, says Virginia Blackburn", *The Express*, February 17, 2016)

This idiomatic expression is analyzed following Steen et al.'s (2010, 135, 170) instructions for annotation of polywords and included in the corpus as a single unit. First, because it cannot be interpreted word-for-word without a loss in (idiomatic) meaning; second, because this multiword item is included as a single unit in a dictionary (cf. *Collins*, *Cambridge*, *Macmillan*). The metaphorical linguistic expression *rearranging the deck chairs on the Titanic* makes manifest the conventional conceptual metaphor NATION AS A SHIP – in this particular example, the UK is conceptualized as a sinking ship. In (11), this metaphorical expression was used humorously to emphasize the futility of an individual's actions (namely, the actions of the Prime Minister Cameron) in a failing system.

6. The FABRIC metaphor

The country to which migrants come is also conceptualized using the conventional metaphorical linguistic expressions *fabric* and *sharper knife* – which belong to the domain of FABRIC. The basic meaning of *fabric* is "cloth, especially when it is used for making things such as clothes or curtains" (*Macmillan*), and the contextual "the fabric of a society or system is its basic structure, with all the customs and beliefs that make it work successfully" (*Collins*). The adjective *sharper*, whose basic meaning is "having a thin cutting edge or a fine point; well-adapted for cutting or piercing", is metaphorically used in (12) in the sense "acute and penetrating".[10]

(12) This is a country with a history of accepting refugees in great numbers. Now its reputation for tolerance seems irrevocably lost. Is there *a sharper knife* that tears at the *fabric* of society than the threat of physical violence on the basis of ethnicity, nationality, gender or political affiliation? The recent images of young men, wearing hoods and dressed in black, roaming the streets of central Stockholm looking for "north African street children" to "punish" for their mere existence reminded Sweden and the world of the worst elements of European history. ("Sweden's anti-refugee vigilantism has revealed its dark side", *The Guardian*, February 1, 2016)

In example below, a locality within a country (in this case, London) is conceptualized as *a patchwork of ghettos*. The basic meaning of *patchwork* is "needlework in which small pieces of cloth in different designs, colours, or textures are sewn together" (*Oxford*), while its contextual meaning refers to "a mixture of different things" (*Cambridge*), whether one talks about "a pattern that things make when you look at them from a long way away" (*Macmillan*) or "something that consists of many different and often confusing parts" (*Macmillan*). In (13), *patchwork* refers to a mixture of religions, cultures, and nationalities.

(13) Another migrant comments: 'The English are dying. They are declining fast.' He recalls in the street markets, there used to be only English voices shouting out, 'advertising their wares in the Cockney accent. But they've gone now'. A Met policeman, who was born in Nigeria, says: 'The English are vanishing. London is no longer an English city at all... London is a *patchwork* of ghettos.' Between 1971 and 2011, the white British share of London's population slumped from 86 per cent to 45 per cent, overwhelmingly the old Cockney working-class. Cockney, in fact, is predicted to die out in 15 years. ("How Labour turned London into a foreign city: Fewer than half the capital's population are white British, gangsters from Somalia terrorise the suburbs and even the tramps are immigrants, reveals astonishing new book", *The Daily Mail*, January 22, 2016)

These metaphorical linguistic expressions are marked conventional because their meanings are listed in dictionaries. They, however, differ at the linguistic level of analysis: *fabric* and *sharper knife* are indirect metaphors, while 'London is a *patchwork of ghettos*' is a direct metaphor with A IS B structure. It is automatically marked deliberate at the communicative level, which means it is an overtly used perspective-changing cognitive device.

7. The HELL metaphor

As mentioned above, we sometimes witness a figurative construal of certain localities within a country. In (14), the makeshift camp of Calais (also known as 'the Calais Jungle') is conceptualized as hell. This metaphorical hell is obviously the place where migrants have to stay until they reach the desired location in the EU. The metaphor of HELL is identified in a paragraph below:

(14) If the Calais camp is a "*living hell*" then there are no words to describe Dunkirk, where I spent a day. In Calais, aid has been allowed in and the refugees' efforts to build an infrastructure have been tolerated. Not so in Dunkirk. Police don't allow any materials that might be used to build shelters or pathways, so people live in tents and tracks of mud. Vehicles are not allowed in, so everything must be carried on foot. ("There's nascent hope in the Calais 'Jungle' camp. So why destroy it?", *The Guardian*, February 18, 2016)

The identified metaphorical linguistic expression belongs to the conventional conceptual metaphor BAD SITUATIONS ARE HELL (cf. Witczak-Plisiecka 2009, 336). At the linguistic level of analysis, this is an example of direct metaphor – which makes it deliberate at the communicative level. In this case, the author opted for a deliberate metaphor as a more prominent vehicle for evaluation (Calais as an

extremely unpleasant place) and persuasion attempt (emphasis on a place that causes great suffering) towards more empathetic view of migration conditions.

8. Conclusion

In British media discourse on the European migrant crisis, the countries, nations and institutions are conceptualized either as A PERSON (e.g. *in a good economic shape*, *architect*, *social worker*), CONTAINER (e.g. *pressure*, *immigration pressure cooker*), A SINKING SHIP (e.g. *rearranging the decks on the Titanic*), a fabric (e.g. *sharper knife, fabric, patchwork*), or HELL (e.g. *living hell*). Our choice of metaphors from what we have at our disposal (serving as source domains to comprehend the target domain) depends on which aspect of a target concept we want to highlight or hide. Conceptual metaphors are described as an amazing ability of the mind to filter correspondences between different entities in order to better understand one in terms of another (Dolić 2021, 52). This ability to filter is precisely what enables us to control the shape of the message, and gives media the power to manipulate public opinion.

The corpus analysis has revealed that most of the identified metaphorical linguistic expressions are indirect (at the linguistic level), conventional (at the conceptual level), and non-deliberate (at the communicative level). The 'insistence' on indirect metaphor use means that the metaphorical message is covert (unlike direct metaphor, which draws attention to the mappings between the two domains). Our analysis of metaphors at the conceptual level has shown that novel conceptual metaphors are less represented in newspaper reporting – as is also claimed by Deignan (2005, 40), Krennmayr (2011, 35), and Steen (2008, 220). This leads to the conclusion that people prefer conventional metaphors, i.e. they rarely resort to innovative metaphors to achieve figurative use of language. Conventional conceptual metaphors that have novel metaphorical linguistic expressions are more often used because "by manipulating familiar concepts (...) a creative, recognizable, effective and easy-to-remember language is created, and recipients have no greater difficulties in processing it because it is based on established concepts" (Berberović and Delibegović-Džanić 2014, 22). We did identify an example of a novel linguistic expression (*social worker*), but it belongs to the conventional conceptual metaphor (A PERSON metaphor). This ratio between conventional and novel metaphorical linguistic expressions gives us an insight into the extent to which some metaphors are naturalized (even clichéd), and yet with a clear rhetorical message they leave a significant effect on the recipient in communication.

Since novel metaphors are based on original mappings between two domains of experience, these are automatically considered deliberate at the communicative level. However, it needs to be pointed out that there are conventional metaphorical expressions identified in this corpus which are used deliberately, either as a part of

A IS B structure (e.g. *a patchwork of ghettos*) or as extended metaphors (i.e. creative stretches of figurative language). Apart from the fact that the extended metaphors may vary in structure (cf. Steen 2009a, 191), both novel and conventional expressions may undergo the creative stretching. Obviously, a metaphor is rhetorically more effective if it is used in a more striking way, and the rhetorical message conveyed by the innovative (i.e. novel) expression gains strength. However, the importance of creative elaboration of conventional metaphor lies in the fact that "the creative stretching of a conventional metaphor produces greater cognitive effects but at the same time remains understandable to the members of the discourse community" (Berberović 2013, 317). A good example of this is the metaphorical linguistic expression *rearranging the deck chairs on the Titanic* in (11), where the person responsible (the prime minister) obviously does not deal with essential but banal (decorative) things, while the country affected by migration (a sinking ship) in a serious situation. This metaphor not only warns of the seriousness of the situation, but also criticizes a person of authority with a dose of sarcasm.

It is worth pointing out that metaphors are not inherently good or bad (cf. Lakoff 1992), but rather depend on the context.[11] Previous research (cf. Santa Ana 2002; Musolff 2015, 46; Bošnjak 2020, 63-64) points to the existence of positive aspects of the analyzed metaphors that are underexploited. Santa Ana (2002, 299–301) offers examples such as "Immigration is the *lifeblood* of the California economy." and "This country was built on the *backs of immigrants*." that put into focus the 'gain' from migration. Thus, using more positive aspects of a person, a ship, or a fabric is possible. This, however, implies the shift from resorting to negatively connoted expressions from these domains, and the authors turning to neutral or positive reporting about the topic. Rather, some authors tend to use figurative language in a derogatory manner to fit their (ideological) viewpoints (e.g. to express concerns on how migrants would fit into the fabric of a society).

This analysis revealed that this set of metaphors is exploited for ideological purposes. The FABRIC metaphor draws on the idea of social unity, thus implying social exclusion of 'others', which results in their social marginalization. By drawing on the scenario of pressurized borders and countries exceeding their full capacity, the container metaphor fosters the implications of harmful effects of migration and potentially hostile behavior of migrants. It also reveals the relations among the EU countries amidst the crisis. Distinctions are made between the 'countries of transit' and the 'countries of destination (e.g. Greece is seen *as a pressurized immigration cooker*, Middle Eastern countries as the ones *shouldering* the crisis, while the UK is metaphorically presented as a sinking ship). The SINKING SHIP metaphor, which is made manifest by the use of metaphorical expression *rearranging the deck chairs on the Titanic*, is used to criticize the UK Prime minister's lenient migration policy-making. The PERSON metaphor is the dominant one in the corpus taken the number of the identified metaphorical expressions from this domain. These range from clichéd, conventional expressions (e.g. *shoulder*)

to extremely negative expressions (e.g. *suicide*). In our view, this difference in the use of metaphorical expressions (ranging from more to less negatively connoted) may be viewed in terms of the political orientation of newspapers in whose articles these have been identified. For instance, the metaphorical expressions *damned duty, nervous crisis*, and *suicide* are used to metaphorically describe Europe. The first two expressions are identified in The Guardian (center-left orientation, harboring the ideas of social democracy, social justice, and multiculturalism), while the latter expression is identified in Daily Express (right-wing-oriented, typically favor socially traditional ideas). Furthermore, Daily Mail (right-wing-orientated newspaper) uses *the patchwork of ghettos*, while The Guardian uses *sharper knife* and *fabric*. In other words, both newspapers exploit conventional metaphorical expressions from the same source domain (fabric). While The Guardian author used an indirect, non-deliberate metaphor, the Daily Mail author opted for a direct, deliberate metaphor, i.e. resorted to the overt use of metaphor as a perspective-changing device. Of course, extensive research is necessary to make any further claims or draw final conclusions about this. We suggest future research to focus on the potential cases when authors merely want to be critical of migration policy-making, and when they aim to promote anti-immigrant ideologies. Steering the public towards a certain viewpoint influences the recipients' perception and leads them to draw on the same ideologies in making sense of the topic at hand.

Another issue arises from the fact that the corpus does not include examples of the use of alternative metaphors. We highlight the need to promote the use of the so-called sanitized discourse (cf. Santa Ana 2002, 362), which would shift the established conceptual framework. While doing research and reading previous articles on this topic, we did witness examples of metaphors which try to put emphasis on 'benefits' that migration brings to the society (e.g. the phrases such as 'migrants are the backbone of economy'), where fully integrated migrants are seen as a positive force strengthening the national fabric (cf. Bošnjak 2020, 63), and skilled workers and academics as benefits to the economy (cf. Musolff 2015). Such an approach, however, results in creating an image of 'deserving' as opposed to 'undeserving' migrants (cf. Flores Morales and Farago 2021). Musolff (2019, 348) strongly suggests reconceptualization of the existing metaphorical framework "to counter well-established, nationalist bias of nation as body metaphor" for instance, and points to the need of "creative discourses that breathe new life into critical and emancipatory aspects of those metaphorical concepts that are our heritage." This analysis shows the range of cognitive devices we have at our disposal to make an effort in changing the established conceptual framework of metaphors used to conceptualize the nations, countries, and institutions deemed to be the actors of the European migrant crisis.

Notes

1   For metaphorical utilization, highlighting, and hiding see Kövecses (2010, 91).

2   The bodily basis of metaphors in our mind is described by Johnson (1987) and Santa Ana (1997, 327).

3   On the representation of migrants as less valuable beings than citizens see Cunningham-Parmeter (2011) and Santa Ana (2002, 87-88; 94-95).

4   Cf. Tamcke (2017, 806–813), who writes about America as a paradise of hope and freedom, and Iraq as a paradise lost.

5   For the role of similarity and sufficient distinctness see Steen et al. (2010, 37) and for contrast and comparison see Steen et al. (2010, 54).

6   Cf. Goatly (2007) for HUMAN AS ANIMAL metaphor, which belongs to the great chain of being – a metaphorical system that explains how things in the world are conceptualized metaphorically, as well as their hierarchical relationship.

7   For deliberate metaphor signaling see Steen (2009a; 2009b; 2010), Krennmayr (2011), Musolff (2011), and Herrmann (2013).

8   This corpus is part of a comprehensive study presented in Mujagić (2022a), the book which analyzes the corpus of 247,912 words (126,010 words from newspapers written in English, and 121,902 words written in Bosnian/Croatian/Serbian) and mainly focuses on ANIMAL and DANGEROUS WATERS metaphors. This corpus was annotated by the book author, after which the the agreement is reached with the two book reviewers. The analysts followed Steen et al.'s (2010, 109–112) instructions about "including rather than excluding borderline cases of metaphoricity" and adopting "a general view on metaphor, which means that we assume a general reader". From this broad corpus of metaphorical expressions, the specific set of metaphorical linguistic expressions is selected for discussion. In the book (Mujagić 2022a), these have only been identified as occasional metaphors, as they appear sporadically in the analyzed newspaper articles and "do not seem to be associated with other more commonly used semantic source domains" (cf. Santa Ana 2002, 71). After identifying these 46 English expressions as metaphorical, we now attempt to shed light on their role in migration discourse.

9   Our examples contain other expressions that are metaphorical but are outside the focus of this study. Those are, for instance, *burden* in (2), *flow* in (3, 4, 5), *bottleneck* (6), *open-door* (7), *Jungle* (14). More about these metaphorical expressions may be found in focused studies by Mujagić (2022b; 2019; 2018).

10 https://www.vocabulary.com/dictionary/sharp; retrieved on January 26, 2022

11 For the contextual factors, context and metaphorical creativity, and the conceptual context of linguistic humor see Kövecses (2015).

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Metaphor and English Promotional Tourism Discourse: Systematic-narrative Hybrid Literature Review and Future Research Areas

Abstract: As there is lack of a research synthesis on metaphor in tourism discourse up to date, the paper offers a novel contribution by summarising empirical literature on metaphor use in print and digital tourism promotional materials and identifying the existing research gaps. The review uncovers that figuration is largely underexplored in tourism promotion literature revealing only general functions and specific examples of metaphors. The paper also presents preliminary results from ongoing research on metaphor use in English e-promotional tourism discourse. Thereby, the paper provides new insights into metaphor as a multifaceted phenomenon integrating discursive, conceptual, and cultural elements and contributes to our understanding of the role of metaphor in cross-cultural communication.

Keywords: metaphor, tourism discourse, promotion, conceptual metaphor theory, deliberate metaphor, tourist destination, cross-cultural communication

1. Introduction and context: the role of metaphor in promotional discourse

Today, there is a wide range of research on formal and functional characteristics of metaphor across discourses, registers, and genres (Semino 2008; Steen et al. 2010; Deignan, Littlemore and Semino 2013; Semino and Demjén 2017; to name just a few). In this regard, the role/use of metaphor in promotional discourse has been studied extensively (see, for example, McQuarrie and Mick 1996; Goatly 1997; Sopory and Dillard 2002; Semino 2008; Forceville 2012; Van Stee 2018; Pérez-Sobrino, Littlemore and Ford 2021; among others). The

researchers conclude that in advertising genre, metaphor has a great potential for persuading (Sopory and Dillard 2002; Ottati and Renstrom 2010; Burgers et al 2015; Hidalgo-Downing and Blanca Kraljevic-Mujic 2017; Van Stee 2018) as well as creating ideological messages (Koller 2009a; Velasco-Sacristán 2010). In addition, it has a great impact on advertising communication (Mcquarrie and Mick 1996), brand personality management (Ang and Lim 2006; Delbaere, McQuarrie and Phillips 2011; see also Koller 2009a; 2009b), and ad memorability (Phillips and McQuarrie 2004)[1].

Analysing metaphor use within cognitive and discourse-analytical perspectives, Elena Semino (2008) claims that metaphors in advertising discourse are used "as attention-grabbing devices", especially if they are novel and/or creative (Burgers et al. 2015), i.e., deliberate[2] (Steen 2015; 2017; Reijnierse 2017). Furthermore, in accordance with Conceptual Metaphor Theory (henceforth CMT) (see Lakoff and Johnson 1980/2003; Kövecses 2020), which defines metaphor as seeing one thing (typically more abstract and intangible - called *the target conceptual domain* within CMT) in terms of another (usually more concrete/tangible – referred to as *the source conceptual domain*), the ability of metaphor to highlight some aspects while hiding others (Lakoff and Johnson 1980/2003; Goatly 1997; Kövecses 2020), makes metaphor a powerful tool for creating subtly persuasive messages by evoking emotions (Ortony 1975, 50) and influencing evaluations (Sopory and Dillan 2002; Van Stee 2018). Therefore, in promotional discourse, metaphors can represent the advertised products in terms of other objects and by doing so, foreground the features that agents want the audience to associate with them (Semino 2008, 168-169). Hence, metaphor can orient readers' choices of the desirable product, exert a profound effect on decision-making (Thibodeau and Flusberg 2022), and finally, prompt further actions (Thibodeau, Matlock and Flusberg 2019; Kövecses 2020). These are crucial for the promotional tourism discourse (henceforth PTD) in particular, as according to Francesconi, in tourism promotion, "communication occurs not only if the tourist reader understands the message but if s/he *reacts to it and is persuaded to visit the destination*" (*emphasis mine*, Francesconi 2008, 3).

Following this introduction, section 2 covers general theoretical issues related to the language of tourism; section 3 offers a literature search design; section 4 presents the overview and critical analysis of major studies on metaphor in the PTD, focusing on print as well as digital promotional materials; section 5 provides a qualitative summary of the findings and general tendencies while the final section offers preliminary results of the ongoing analysis of metaphor in English PTD and suggestions for further research.

2. Theoretical overview: metaphor and promotional tourism discourse

While the existing research on promotional discourse provides invaluable insights into the forms, conceptual models, and functions of metaphor, few attempts have been made to study the use of metaphors in the promotional *tourism* discourse. According to Dann (1996, 3), tourism is a form of social control as the language of tourism promotion tends to "persuade people to become tourists and subsequently control their attitudes and behaviours through pictures, brochures, and other media". In this regard, advertising texts along with visuals are aimed to govern tourists' choices (Djafarova and Andersen 2008, 292), by shaping their "tourist's gaze" (Urry and Larsen 2011). Accordingly, tourism advertising represents a system of meanings that transforms "ordinary" places into extraordinary tourist destinations (Hallett and Kaplan-Weinger 2010, 121; Francesconi 2014). This distinguishes tourism promotion from ordinary advertising as it is inherently the promotion of intangible products (Santulli 2007, 45) with the aim of selling "a dreamed experience" (Francesconi 2008, 181; see also Maci 2013; Francesconi 2014) by exploiting various semiotic means among which the language occupies a key role. Based on this discussion, it can be concluded that in tourism advertising "phrase precedes the gaze", and "tourism, in its act of promotion, ... has a discourse of its own" (Dann 1996, 2). Consequently, the language of tourism was recognised as a "specialised language" (Nigro 2005; Gotti 2007) and is included in the framework of English for Specific Purposes (Maci, Sala and Godnič Vičič 2018, 3).

The language of tourism promotion has been studied extensively (see Dann 1996; Jaworski and Pritchard 2005; Mocini 2005/2009; Cappelli 2006; Maci 2013; 2020; Maci, Sala and Godnič Vičič 2018; Jojua 2022); including keywords (Rokowski and Curad 2003), translation and cultural studies (Pierini 2005/2009; Durán-Muñoz 2011; Manca 2012; Gandin 2013; Sulaiman and Wilson 2019; Giampieri and Harper 2020), tourist language as ESP/LSP (Nigro 2005; Ruiz-Garrido and Saorin-Iborra 2012), and specific linguistic features and terminology (Manca 2008; Pierini 2009; Durán-Muñoz 2019; Durán-Muñoz and L'Homme 2020). However, the language of metaphor in tourism promotion has received far less attention. The scarcity of research may be attributed to the fact that according to some researchers, metaphors are not frequently employed in tourism discourse (Calvi 2001; Narváez and Valverde Zambrana 2014; qtd. in Giampieri and Harper 2020), for the tourism promotional language is already so diverse, euphoric, and emphatic that it does not require any additional colouring (see Calvi 2001). Another reason for this may be the complexity and ambiguity of meaning usually associated with the interpretation of figurative devices (Djafarova and Anderson 2008). However, some studies along with my current research do reveal some general functions and trends related to metaphor usage in PTD, as the following sections will demonstrate.

3. Methodology: literature search

The article belongs to the category of systematic-narrative hybrid literature reviews, as proposed by Turnbull, Chugh and Luck (2022), that "draws on characteristics of both the narrative and systematic review traditions" (Turnbull, Chugh and Luck 2022, 2). This implies that "the search protocols and inclusion/exclusion criteria draw from elements of systematic review practices and apply a narrative approach to analyse the shortlisted articles." (Turnbull, Chugh and Luck 2022, 3).

First of all, in order to find the relevant material for the review, it was necessary to operationalise the term *tourism promotion*, which in my research project, I defined as follows: *the act of promoting a destination as well as the experiences related to it by tourist marketers (of the respective destination) to potential tourists.* This means that the research material on tourism b/vlogs, reviews, and other types of texts produced by, for example travellers, were excluded.

The next stage involved the formulation of research questions regarding metaphor use in PTD, with the aim of making the literature analysis more systematic. By bridging the currently most influential theory of metaphor, (extended) CMT (Lakoff and Johnson 1980/2003; Kövecses 2010; 2020), discourse-analytical studies of metaphor (Semino 2008; Steen et al. 2010; Deignan, Littlemore and Semino 2013; Reijnierse 2017; Steen 2017), and (socio)linguistic and cultural studies of tourism (Cohen 1972; 2000; MacCannell 1973; 1976/1989; Dann 1996; 2002; Jaworski and Pritchard 2005; Cappelli 2006; Hallett and Kaplan-Weinger 2010; Maci, Sala and Godnič Vičič 2018; Sulaiman and Wilson 2019; among others), three general research questions were posed on three levels of analysis, following the *communicative turn* in metaphor studies (Steen 2015; 2016; 2017; Reijnierse 2017), namely, communicative (RQ 1), conceptual (RQ 2), and linguistic (RQ 3) dimensions:

1. *What function(s) do metaphors perform in tourism promotional materials?*
2. a) *Which conceptual models prevail in this text type?*
   b) *Are there any cultural specificities in terms of the conceptual models used for the promotion of different destinations?*
3. *What specific linguistic characteristics does metaphor exhibit in promotional tourism texts?*

The following step implied carrying out an electronic search: the data were collected by identifying the English-language open-access papers published in databases such as Research Gate, Google Scholar, and Scopus (Elsevier), deploying the following search terms: "metaphor and tourism", "culture, metaphor and tourism", and "figuration and tourism" *without any restrictions on publication period* (which turned out to be necessary during the search process, due to the scarcity of material on the topic). Some articles from the obtained material were excluded as inappropriate during the cleaning process due to the nature of the research (e.g., the articles describing *tourism* as a metaphorical source domain). Therefore, I

also used "backward and forward reference searchings", which imply the search of material by reviewing the bibliographies and the latest publications that cite relevant publications, respectively, with the aim to find relevant research in the field. Additionally, I used "backward or forward author searching", which means searching for older (backward search) or more recent (forward search) relevant publications written by authors of relevant publications (Burgers et al. 2019, 104-105).

As a result, the search yielded the final set of seven research articles, one conference paper, three book chapters dedicated to metaphor research, and two books with brief mentioning of metaphor use in PTD. The publication dates of the database encompass the timespan from 1996 till 2022.

Finally, the qualitative content analysis of the collected material was conducted in order to evaluate patterns and give a critical account of various aspects of the literature "with a view to reaching a number of generalizations about the topic", synthesise them transparently, find the answers to the research questions posed above, and thus, "identify[ing] issues in need of further research" (Ellis 2015, 1, 5).

4. Main findings

In order to identify what has been done hitherto and what research gaps need to be filled regarding metaphor studies in tourism promotional materials, I analysed the existing studies on metaphor use in the PTD following the procedures above. Below I attempt to present an overview and critical analysis of some major research projects on figuration in the PTD. In particular, I highlight the general tendencies while linking them to the main tenets of up to date the most dominant theory on metaphor, (extended) CMT (Lakoff and Johnson 1980/2003; Kövecses 2010; 2020), discourse-analytical studies of metaphor (Semino 2008; Steen et al. 2010; Deignan, Littlemore and Semino 2013; Reijnierse 2017; Steen 2017), as well as with (socio)linguistic and cultural studies of tourism (Cohen 1972; 2000; MacCannell 1973; 1976/1989; Dann 1996; 2002; Jaworski and Pritchard 2005; Cappelli 2006; Sulaiman and Wilson 2019; among others).

Graham Dann was the first to emphasise the importance of metaphor in the PTD, within the sociological studies of tourism. The author claims that metaphors and similes[3] are "massively used in tourism advertising texts" (Dann 1996, 172), and their main function, "if not their [its] merit", lies in their ability to reduce the geographical and cultural distance of a destination (Dann 2002, 4). Accordingly, metaphor in tourism advertising discourse is mainly used to "manage the unfamiliarity of the destination". Based on this assumption, its frequency is claimed to increase in relation to promoting physically and/or culturally *distant* places (*emphasis mine*, Dann 1996, 172–174) as well as developing countries (Dann 2002, 4), with the aim of posing the destinations as something special and extraordinary, and yet very close to ordinary experiences.

In a similar vein, Elmira Djafarova and Hans Christian Anderson (2008) and Elmira Djafarova (2017) argue that metaphor can reduce long-haul destinations by using more familiar concepts for the sake of reducing the strangeness factor; this leads them to the conclusion that "its usage tends to increase in direct relationship to the strangeness of the destination being advertised" (Djafarova and Anderson 2008, 298). Similar to Semino (2008), Djafarova and Anderson mention attention-grabbing as one of the functions of metaphor use in tourism promotion by creating a rich visual image of the destination and the experiences on offer in the mind of a potential tourist (Djafarova and Anderson 2008, 298; see also Djafarova 2017, 39-40). Furthermore, in their discussion of the benefits of metaphor for the tourism advertising discourse, the authors highlight the "compact" nature of metaphor: a metaphor is attractive and eye-catching to the user and, most importantly, it can *convey several meanings in a single phrase* (*emphasis mine,* Djafarova and Anderson 2008, 298-299). This is crucial for the e-PTD in particular, as the language on the web tends to be short and concise (Manca 2012; Sulaiman and Wilson 2019), which is why metaphor is the very means that can be effectively employed. It is interesting to note that all these assumptions are also in line with the three communicative functions/hypotheses that metaphors are claimed to serve according to cognitive linguistics (Ortony 1975; Gibbs 1994), namely *the compactness hypothesis,* which refers to the idea that metaphor provides a compact means of communication as it can pack a great deal of information into fewer means compared to the literal language; *the inexpressibility hypothesis,* which is related to the idea that metaphors can express the information "which is difficult or impossible to express if one is restricted to literal uses of language" (Ortony 1975); and *the vividness hypothesis,* which holds that metaphors can convey information and describe our experience in a richer and more detailed way. This again proves the usefulness of metaphor for e-PTD, and thus, runs contrary to the arguments of some researchers maintaining that tourism discourse does not require metaphor.

It is noteworthy that Djafarova and Anderson's work represents the first diachronic quantitative exploration of figuration in tourism discourse: based on the analysis of 400 advertisements (200 issued in the 1970s, and 200 in 2005), the authors found that compared to puns and alliteration, the use of metaphor dropped sharply from 21.5 per cent (of all of the texts published in the 1970s) to 15 per cent (2005), while alliteration use, on the contrary, increased (from 14.5 to 19.5 per cent)[4]. The researchers attributed these results to the relative ease of the interpretation of messages containing *schemes* (i.e., *alliteration, assonance, etc.*), and difficulties associated with the interpretation of *tropes*[5] (i.e., *metaphor, puns, etc.*); according to the authors, in many cases, the reader may not grasp metaphors properly or may not find the information they need due to the insufficient scaffolding and/or misunderstanding of the metaphorical meaning. Since tourism is inherently a cross-cultural phenomenon, the reason for this might be the fact that marketers cannot adequately assess the personal and intellectual abilities of

all users to evaluate the metaphor interpretation process (Djafarova 2017, 45). Moreover, the ability of metaphor to trigger semantic and pragmatic tensions (see Cameron 2003; Charteris-Black 2004) may further complicate the process. In this regard, Djafarova and Anderson offer a typology of metaphors that aims to facilitate the understanding of marketers' messages: they distinguish between object-based (i.e., based on the comparison with a concrete entity) and concept-based (i.e., involving an abstract entity) metaphors. The researchers warn us that concept-based metaphors do not provide an appropriate, desirable visual image of tourism without sufficient linguistic/visual "anchoring" since these metaphors do not contribute to the understanding of such a complex phenomenon as tourism unless a further explanation of the metaphor is provided (Djafarova and Anderson 2008, 298; Djafarova 2017, 45). This assumption can be related to the earlier study conducted by Morgan and Reichert (1999): the authors expressed a similar concern in relation with the language of advertising and highlighted the importance to distinguish between concrete and abstract types of metaphors, especially if the issue is related to the user's perception and understanding of a metaphorical message. The researchers empirically proved that addressees understand concrete metaphors better than abstract ones (see more in Morgan and Reichert 1999). Accordingly, although Djafarova and Anderson (2008) and Djafarova (2017) do not confirm their assumption empirically, the experiment of Morgan and Reichert (Morgan and Reichert, 1999) corroborates the advantage of concrete metaphors when it comes to creating an appropriate image of the destination advertised. This, in its turn, leads to a more effective understanding of promotional messages especially if they are related to a cross-cultural promotion.

A significant study for the tourism promotion literature is provided by Sabrina Francesconi (2008), who analysed excerpts of texts on world-famous destinations published in the period 2003–2005 from British tourist advertising catalogues. The aim was to determine how different places are promoted using the conceptual source domain of PRECIOUS STONES[6] (such as *gems, gold, emeralds, pearls, turquoise*, etc.). The author concluded that these metaphors are prevalent in tourism promotional material and foreground the unique preciousness and extraordinariness of the destination by emphasising its "impressive beauty, grandeur and value" (Francesconi 2008, 180-181), which in turn, endows it with an elevated status (Francesconi 2008, 182–184). Francesconi's work made an invaluable contribution to the literature on metaphor in tourism discourse as subsequent studies (see Jaworska 2017, Iritspukhova, in preparation (a)) report similar results. This means that the metaphors of PRECIOUS STONES exhibit metaphorical discourse systematicity (see Cameron 1999), i.e., they are common for the specific type of discourse of tourism promotion.

Jodie George (2010), in her analysis of poetry "utilised primarily as a marketing tool" to promote a destination, attempts to determine how poetic devices such as metaphors, alliteration, etc., "inscribe particular cultural meanings onto landscapes

for economic purposes" (George 2010, 1, 3). Similarly to Dann, the author claims that "metaphors are useful within tourism advertising because they help ameliorate unfamiliarity by drawing comparisons between that which is well-known and the more foreign qualities of a location", and it is especially effective and "strategic" in the promotion of developing countries. In this regard, George distinguishes so-called *place-based cliché* metaphors (such as *Côte d'Ivoire - the African Riviera* (George 2010, 8), which "focus on the beneficial qualities of the destination through a comparison with *somewhere* known to be desirable", and PRECIOUS STONES metaphors (for example, the *Jewel* of the Mekong), which suggest that the place "is magnificent in its splendour, precious and valuable" (*emphasis mine*, George 2010, 8). The author points out, however, that by using metaphors marketers often tend to idealise or "romanticise" a place, by hiding the negative or even "tragic" realities of the respective locations (e.g., *poverty, high levels of illiteracy*, etc.), thus "making distant any unpleasantness to avoid adversely impacting on the tourist" (George 2010, 9). Interestingly, a similar concern was raised by Djafarova and Anderson, who concluded that "advertisers can use metaphors to *avoid the responsibility* of presenting *real* images of tourism" (*emphasis mine,* Djafarova and Anderson 2008, 299-300). Consequently, metaphor in this case may act as an effective tool which can highlight certain qualities while skilfully pushing unfavourable aspects into the background, and thus, may create ostensibly positive social realities for us (Lakoff and Johnson 1980, 156).

Richard Hallett and Judith Kaplan-Weigner's (2010) work represents one of the first comprehensive studies of the e-PTD. Drawing on multimodal discourse analysis techniques and CMT, the authors analyse the role of the language and visuals used on the official promotional tourism websites, otherwise known as official destination websites (Fernández-Cavia et al. 2020, 2), in the formation of tourist and destination identities. The researchers highlight a distinctive discursive strategy that metaphors usually serve in this type of text, namely that of a narrative device (Hallet and Kaplan-Weigner 2010, 12). They conclude that it is through the use of metaphor that official tourism websites construct and promote the regional and social identity of a place, which in turn, prompts the reader to assign metaphor-related values to the described place and thus, form their own identity (Hallet and Kaplan-Weigner 2010, 5, 45, 56, 57). As an illustration, the authors examine Louisiana's official destination website before and after Hurricane Katrina and argue that the most prominent metaphors describing the destination before the disaster were LOUISIANA IS FOOD and LOUISIANA IS DIVERSITY realised linguistically in the form of metaphors and similes as well as visually, in photographs. These metaphors in tandem formed the identity of Louisiana as a culturally diverse state, or as "a smaller version of the quintessential American melting pot" (Hallet and Kaplan-Weigner 2010, 49). However, after the hurricane, these two were replaced by the conceptual metaphor LOUISIANA IS A PHOENIX/LOUISIANA IS REBORN, which shows the physical devastation of the state, and pleas the nation and tourists for social action to restore the society destroyed by natural disasters

(Hallet and Kaplan-Weigner 2010, 48–56). The images accompanying the verbal metaphors depict light that may signify the new energy and life of the state and reinforce the verbal metaphors, thus enhancing the overall effect. The authors point out that the "metaphor plays a seminal role in not only recontextualizing a community as a phoenix rising, but also a potential tourist as the morning sun" which takes part in the regeneration of the nation (Hallet and Kaplan-Weigner 2010, 56).

Another important study of the web-based PTD is presented in the work of Elisa Mattiello (2012), who analyses metaphor employing the framework of a relevance-oriented lexical pragmatics theory (Sperber and Wilson 2008). She argues that in tourism promotion, persuasion largely depends on the strategic use of metaphors. Moreover, the author claims that in tourism promotional texts, metaphor is often combined with hyperbole (see also Chen and Ahrens 2022), and is frequently used in chains of metaphorical expressions, which further strengthens its persuasive potential. In this regard, a more detailed study of hyperbolic and extended metaphors is very interesting, as they usually act as deliberate metaphors (Reijnierse 2017) and hence, are both more salient to the reader (Steen 2015; 2017). In addition, the interplay of hyperbole and metaphor (along with other figurative devices) may contribute to the figurative framing effect of the message, which "can have an impact beyond each of the figures in isolation" (Burgers, Konijn and Steen 2016, 12), and thus, maximise the suasive effect. It is noteworthy that in this and her later study on the translation of metaphors (2018), Mattiello draws our attention to the extensive use of personification metaphors in tourism discourse arguing that "they have highly suasive power upon tourists exploring the web in search of an ideal holiday destination" (Mattiello 2012, 72). This is an important claim since tourism discourse crosses cultures, and sometimes metaphors tend to cause misunderstandings, especially if the shared knowledge and expectations on which it relies are not matched. In this regard, personification, i.e., endowing an inanimate object with human characteristics/qualities, makes use of the best and most familiar source domain for everyone - *humans* (*emphasis mine*, Kövecses 2010, 39; see also, Lakoff and Johnson 1980/2003), which may enable the marketers to stay on a safer side and resolve the problem posed by Djafarova and Anderson (2008), and Djafarova (2017) (see above). The prevalence of personification metaphors in tourism discourse is also confirmed in my research data (Iritspukhova, in preparation (a)), cf. (metaphorically used words are given in *italics*):

1) The other natural reserves, Sataplia and Prometheus caves are offering an experience of going really underground to the very *guts*[7] of Georgia. [https://georgia.travel/en_US/article/Georgias-best-places-for-adventurous-souls]

2) It [New Orleans] is a city that *greets* you with an Old-World appeal and *embraces* you with its *spirited soul*. [https://www.visittheusa.com/experience/rhythms-south-3-cities-3-tastes-southeast]

3) Small in size but *big on personality*, Wales is bordered by England to the east … [https://www.visitbritain.com/gb/en/wales]

The first two of these examples feature novel and creative extensions of the conventional conceptual metaphor A COUNTRY IS A LIVING ORGANISM/A PERSON represented by a novel linguistic metaphor *guts* in the sentence (1), and an extended metaphorical chain of words *greets*, *embraces* and *spirited soul*, in the sentence (2), thus all of them representing deliberate metaphors. In the sentence (3), metaphor is realised by the words *big on personality*. However, the last example differs from (1) and (2) in that it represents *a metaphorical zeugma* (Iritspukhova, in preparation (b), as a manifestation of deliberate metaphor (see also Steen 2016, 119), as the concrete size of the country is combined and compared with the abstract size of the country's personality. These examples again show how marketers can manipulate familiar domains and offer creative elaborations that strike readers and hence, may capture their attention, which in its turn, enhances their interest. Moreover, these examples alongside the evidence from other researchers (e.g., Chen and Ahrens 2022) prove that along with PRECIOUS STONES metaphors, personifying metaphors also display metaphorical discourse systematicity in the PTD. Interestingly, Delbaere, McQuarrie and Phillips (2011) based on a series of experiments, report that personification metaphors are important persuasive tools in advertising as they tend to "increase the liking for the brand" by evoking "positive emotional response" in consumers. They "produce[d] more positive attributions of brand personality, relative to what other visual metaphors, not using personification, could accomplish" (Delbaere, McQuarrie and Phillips 2011, 127). This means that personification metaphors are prevalent in promotional materials in general and are not restricted to PTD only.

A more in-depth analysis of metaphor is presented by Sylvia Jaworska (2017): using a corpus-based methodology and CMT, the author attempts to empirically test Dann's hypothesis regarding the relationship between the frequency of metaphors and the geographical/cultural distance of the destination promoted (see above, Dann 1996; 2002). It is worth noting that the researcher is highly transparent about her operationalisation of metaphor and metaphor identification protocol. Moreover, she divides her analysis into linguistic and conceptual levels, which is called upon in current metaphor research (Steen 2007; Steen et al. 2010).

The results of Jaworska's study reveal a significant quantitative difference in the use of metaphors, with more metaphors employed for promoting culturally and physically remote destinations as compared to relatively nearby locations, and thus, empirically confirm Dann's hypothesis. Moreover, the author offers a more refined version of the jewels metaphors earlier proposed by Francesconi (2008), namely: LANDSCAPE ELEMENTS ARE JEWELS. Alongside, she distinguishes other recurring conceptual metaphors, among which the most frequently used are those associated with the body (see Mattiello 2012), such as A TOURIST DESTINATION IS A CENTRAL PLACE, A TOURIST DESTINATION IS A SLEEPY BODY. The research also revealed new conceptual models employed in PTD, such as A TOURIST DESTINA-TION IS A PAINTING, metaphors related to religion A TOURIST DESTINATION IS A LAND

OF PLENTY, and taste ELEMENTS OF LANDSCAPE ARE A (SWEET/DELICIOUS) TASTE (Jaworska 2017, 30). An interesting finding was that in the advertising tourism texts of nearby destinations (in this case, Britain) conventional metaphorical expressions related to BODY appeared more often, while in the texts promoting distant places, the top-used metaphors were associated with NATURAL SUBSTANCE, RELIGION, and sensory conceptual domains, such as COLOR and TASTE. The author concludes that sensory conceptual metaphors "work together to evoke images of the rare beauty and abundance of resources and attractions of important, pristine, luxurious and colorful places", and create "a sensory fusion of sight and taste images that can potentially increase the 'appetite for consumption' (original emphasis, Jaworska 2017, 30). This presents destinations as more attractive and open for exploring. However, at the same time, the author points out that "these metaphors obscure social and environmental issues" and "give ideologically charged messages that covertly hide aspects of reality and thereby reinforce colonial and neo-colonial legacies" (Jaworska 2017, 30). We may conclude that in this case, the author similarly to George (see above, George 2010), emphasises the function of metaphors to highlight the aspects that glorify the destination by deliberately obscuring its unfavourable tangible (e.g., tourist attractions, etc.) as well as intangible (e.g., culture, history, etc.) features, thus creating different social realities (Lakoff and Johnson 1980, 156).

5. Summary

The account has provided a review of the main literature on the topic of metaphor use in the PTD. The results in most cases reveal the answers to the research questions posed for undertaking the review, as follows below.

RQ 1: What function(s) do metaphors perform in tourism promotional materials? Most authors point out that in the PTD, metaphors are mainly used to reduce the strangeness of the destination, especially if the promotion concerns a remote and/ or developing country. Interestingly, within the sociological and anthropological studies of tourism, one of the main motivation drivers of people to travel is postulated to be a so-called *strangehood perspective*, otherwise known as the search for the exotic. This strangeness. or exoticism, may be found in another place, culture, gastronomy, lifestyle, geography, etc. However, most people show some caution in this regard, since although novelty and unfamiliarity are important elements in the tourism industry, not all people are ready to fully immerse themselves in a foreign environment (Cohen 1972, 166). Consequently, personnel working in the tourism industry try to reduce the aspect of unfamiliarity not only materially (by providing products/services close to home comfort, bilingual staff who can also speak the tourist's language; international cuisine that is recognisable and

acceptable to tourists, etc. (Cohen 2000, 559; Sulaiman and Wilson 2019, 8), but also verbally and conceptually by referring to different means, one of them being the active use of metaphors. Therefore, as metaphor can reduce the strangeness of a concept/referent by helping us to conceptualise it in more familiar terms, it can offer a more familiar and thus, non-threatening picture of the experience, "for unfamiliarity to remain pleasurable, it must be experienced within the shelter, enhanced by a touch of familiarity" (Cohen 2000, 559).

Another important function of metaphors in tourism promotion is highlighting the positive aspects of the destination while obscuring its negative features (either material or abstract). The claim is fully compatible with the main postulates of CMT according to which metaphor can foreground some aspects while hiding others, and strategic use of one source domain over another may deliberately accent certain characteristics of the target by disguising others which are less favourable (Lakoff and Johnson 1980/2003; Kövecses 2020). These functions may also be linked to another sociological perspective in tourism, that of *authenticity*, proposed by culturologist and sociologist Dean MacCannel (1976/1989). He claims that in the modern world, one of the main motivations of the tourist is the search for authenticity, i.e., "real life". As a person, nowadays, is tired of the routine, difficulties, instability, and falsehood that fill his/her life, and in this respect, experiences a weakened sense of reality (MacCannell 1976, 93), s/he tries to find the truth in untouched natural landscapes, other cultures, traditions, sometimes in other historical periods. To this end, s/he seeks a certain purity and simplicity in a primitive society. However, in the interest of tourism, the real life of the local population gets largely manipulated and commercialised. Therefore, tourists rarely experience *pure* authenticity, and in most cases, this authenticity is *staged* for them (*emphasis mine,* MacCannell 1976/1989, 91–109; Dann 1996, 8). Accordingly, specifically (or even strategically) chosen metaphors may contribute to this *staging* process by intentionally glorifying the visual attractions as well as the intangible features, like culture, history, etc. social and environmental issues of the destination while simultaneously diverting our attention from the real picture of the place and the life there (George 2010; Jaworska 2017).

The third function of metaphors, in the context of official destination websites, was the formation of the identity of both the destination advertised and the tourists visiting it. By acting as a narrative device, metaphor is said to frame important issues for the destination in such a way as to prompt potential tourists for the action not only to help by visiting it but also becoming the part of its identity formation.

RQs 2: a) Which conceptual models prevail in the PTD? b) Are there any cultural specificities in terms of the conceptual models used for the promotion of different destinations?
A few studies suggest the main models of metaphor which clearly exhibit metaphor discourse systematicity in the PTD (RQ 2a); these are the metaphors related to the

domain of PRECIOUS STONES, A LIVING ORGANISM, and cliché place-based metaphors. Along with them, the prominent metaphors are those drawing from the source domains of SENSORY PERCEPTION (such as TASTE, TOUCH, SOUND, etc.) as well as RELIGION, PAINTING and FOOD. It is interesting to note that personification metaphors are also prevalent in advertising discourse in general. As for the cultural difference in metaphors (RQ 2b), it is suggested that more established and popular destination promoters (e.g., Europe and the USA) employ metaphors related to LIVING ORGANISM and FOOD (especially in the case of the USA) whereas the marketers of farther and exotic destinations prefer exploiting SENSORY PERCEPTION and RELIGION metaphors. It may be concluded that the marketers of more established destinations tend to use relatively more concrete metaphors in the description of destinations and related experiences whereas those of farther destinations usually employ more abstract domains in the promotion (see above, Djafarova and Anderson 2008).

RQ 3: What specific linguistic characteristics does metaphor exhibit in promotional tourism texts?
As for the linguistic manifestation of metaphors, very limited research has been done on the topic and thus, no general trends can be stated as regarded the language of metaphors per se in the PTD (e.g., which parts of speech prevail as vehicles of metaphor). Several studies¸ however, do offer some insights into the patterns of metaphors used in this text type, and the creative use of the language of metaphors: the tourism promotional texts tend to employ hyperbolic metaphors, extended metaphors (metaphorical words that are extended throughout the long stretch(es) of the text) (see above, Mattiello 2012; also Hallett and Kaplan-Weigner 2010) and zeugmatic metaphors (see above, Iritspukhova, in preparation (b)). That means that additional research is needed to study the peculiarities of the linguistic realisation of metaphors as well as their creative manifestation in the PTD (see also Adu-Ampong 2016 for a similar remark).

6. Further perspectives

The review of the literature and the drawn conclusion reveal that despite their valuable contribution to the functions, models, and forms of metaphor, the presented studies are rather limited in their scope and do not offer a systematic description of metaphor use in tourism promotional materials. Additionally, sometimes the authors are not transparent enough regarding their operationalisation of metaphor and the methods used for the identification of linguistic metaphors (but see Jaworska 2017; Mattiello 2018; Chen and Ahren 2022). This complicates the process of replicating the studies and thus, reliably comparing the results. Therefore, we can conclude that in the PTD, the study of metaphor in general, and its creative manifestation, in particular, is still in its infancy. Accordingly, along with the research questions

posed above, additional queries may be raised, such as:

1)   a) What is the frequency and general distribution of linguistic metaphors across the word classes, in the e-PTD compared to other text types (e.g., *news, fiction*, etc.)?
     b) What are the general patterns of linguistic metaphors employed in the e-PTD?
     c) Does the popularity of the destination affect the frequency of linguistic metaphors and their distribution across the word classes? Is there any difference between the developing destinations and more established ones?

2)   a) Which conceptual models prevail in the PTD? Do they differ from other promotional discourses?
     b) Does the popularity of the destination have any impact on the conceptual models used for their promotion? If yes, which models prevail in each case? What is the possible explanation?
     c) Are there any cultural specificities in terms of the conceptual models used for the promotion?

3)   a) What is the frequency and general distribution of deliberate vs non-deliberate metaphors in the e-PTD? What are the general patterns in the deliberateness of metaphors used in this text type?
     b) Does the popularity of the destination influence the frequency, distribution, and patterns of deliberate metaphor?
     c) What other function(s) may metaphors display in tourism promotional materials? Do their functions differ according to the popularity of the destination?

The list of questions is far from exhaustive. However, answering these questions will fill in the current research gaps in cognitive and discourse-analytical studies of metaphor, by posing metaphor as a multifaceted conceptual, discursive, and cross-cultural phenomenon, and offer an important contribution to the tourism language research. It will also be a valuable addition to the studies analysing and comparing metaphor use across different registers (see Steen et al. 2010). This line of research is especially interesting since e-promotional tourism texts belong to the online hybrid register of info-promotion/-persuasion (Biber and Egbert 2018).

        In my ongoing research (Iritspukhova, in preparation (a; b)), I have been ana-lysing the use of metaphor in the web-based PTD of a developing country, such as Georgia, and two popular and established Anglophone touristic destinations, such as the UK, and the US[8], using the cognitive and discourse-analytical framework (Semino 2008; Steen et al. 2010; Deignan, Littlemore and Semino 2013; Reijnierse 2017; Steen 2017; Maslen 2017). I follow Lakoff and Johnson's definition of met-aphor (see Section 1), and for the identification of linguistic metaphors, I use a combination of the procedures such as MIP (Pragglejaz Group 2007), its modified and extended version, MIPVU (Steen et al. 2010), and Deliberate Metaphor Identi-fication Procedure, or DMIP (Reijnierse et al. 2018), brought in line with linguistic

characteristics of tourism language. This method allowed me to systematically ana-lyse the language of metaphor in the research material and offer rigorous results. My analysis reveals that in all the database that I collected for the analysis (around 56,000 words), the overall frequency of linguistic metaphors in the e-PTD text type amounts to around 10%, which puts the e-PTD somewhere between those of conversation and fiction (see Steen et al. 2010). Another interesting finding was that contrary to the long-held assumption that developing countries deploy more meta-phors for their promotion, my data showed fewer metaphors used for the promotion of Georgia compared to the UK and the US: only 9% of all the words used for the promotion of Georgia were used metaphorically, while the figure for the UK was the highest – 12%, followed by the US – 10%. However, the number of deliberate metaphors, in fact, was the highest for Georgia: almost 5% of all metaphorically used words were used deliberately in the Georgian corpus, followed by the US with 4%. Even though the UK showed the greatest proportion of linguistic metaphors, the number of deliberate metaphors was the smallest, amounting only to almost 3% of all the metaphors. This means that the empirical evidence albeit debunking Dann's assumption, partly supports it with a specification of the kinds of metaphors strate-gically employed, i.e., it is the *deliberate* metaphors that might be used more often for the promotion of geographically/culturally remote and developing destinations.

These results are only preliminary and mostly quantitative as more detailed research is being conducted, in an attempt to answer most, if not all, the research questions raised in this section. However, this analysis again shows the importance of systematic research of metaphor use for the promotion of tourist destinations, and basing any assumptions related to such a complex phenomenon as metaphor, on solid empirical grounds. Even from the initial general observations, we can state that this analysis can offer a substantial contribution to the field of linguistics, tourism marketing, and cultural studies, in relation to the differences in conceptual models used for the promotion of each of the destinations. Moreover, the results of such research are significant as they may be a springboard for subsequent studies on the way socio-cultural factors may affect people's comprehension of touristic metaphors and behavioural studies on which models of metaphors are more per-suasive for people from different cultures. A further promising line of research concerns the function and nature of multimodal metaphor as a persuasive strategy in online promotional registers; although there have been several studies analysing metaphor in different modalities (Hallett and Kaplan-Weigner 2010), there is still a dearth of research addressing the use and interplay of verbal and non-verbal metaphors in the PTD, especially on relatively new platforms, such as Youtube, social media ads, etc.

All these may raise tourism marketers' awareness about the breadth of common conceptualisations employed to describe tourism destinations and experiences. The results of such research may also provide them with insights into the possible cul-tural pitfalls that may lead to misunderstandings, and creativity that can be used

in manipulating the language of metaphors for the enhancement of the overall suasive effect. This will help marketers make messages more comprehensible and effective, especially in the cross-cultural contexts.

Notes

1   For a more extensive overview of metaphor use in the advertising genre, see Hidalgo-Downing and Kraljevic-Mujic (2017) and Pérez-Sobrino, Littlemore and Ford (2021).
2   Other candidates for deliberate metaphors are extended, topic/situation-triggered, etc. (see Semino 2008; Reijnierse 2017) as well as zeugmatic metaphors (Iritspukhova, in preparation (b)).
3   It should be noted here that in the (extended) CMT, similes are regarded as so-called *direct* metaphors (see Steen et al. 2010).
4   The use of pun was extremely low in both periods, amounting to 1% in the 1970s, and 0.5% in 2005 (Djafarova and Anderson 2008, 297).
5   The distinction between tropes and schemes goes back to classical theories (see Leech 1969; see also Mcquarrie and Mick 1996) and is not reflected in the CMT as such.
6   In this paper, I follow the internationally accepted conventions in that I write conceptual metaphors in SMALL CAPITALS.
7   For more clarity, other metaphors in the example were not highlighted.
8   The official destination websites were the following: Georgia: https://georgia.travel/; The UK: https://www.visitbritain.com; The US: https://www.visittheusa.com.

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The Key English Pronunciation Difficulties for Egyptian EFL Learners[1]

Abstract: Despite all the attempts by ESL and EFL learners to attain (near-)native proficiency, many phonological, lexical and spelling mistakes still occur in any L2 learning environment (Huwari 2019, 31). This paper aims to investigate the key English pronunciation difficulties, both segmental (on the level of speech sounds) and suprasegmental (rhythm, stress, and juncture), of Egyptian learners of English, in a corpus of audio and/ or video recordings of English conversation and presentation skills classes by Egyptian university students who are also native speakers of Egyptian Colloquial Arabic (ECA). The project involves both contrastive analysis (of the phonological systems of English, Egyptian Arabic and Modern Standard Arabic) as well as error analysis. While the significance of contrastive analysis lies in helping EFL teachers predict the problematic aspects (Al-Saqqaf and Vaddapalli 2012, 56), error analysis would provide them with the actual problems encountered by the learners and the extent of their seriousness.

Keywords: EFL, pronunciation, Egyptian learners, mistakes

1. Rationale and focus

In the context of language learning and teaching, the majority of pronunciation errors are produced by learners as a result of the interference of their first languages in the process of second language acquisition (Elmahdi and Khan 2015, 97). Learners tend to apply the rules of their mother language(s) to the language(s) they are learning, which may result in "a big hindrance in the process of communication amongst speakers" and "spoils the teaching and learning efforts in second language learning settings" (Ahmad 2011, 23).

According to Gilakjani (2012) and Al-Dilaimy (2012), incorrect pronunciation creates "disgrace" and embarrassment while, on the other hand, proper pronunciation creates "respect", fosters social bonding among interlocutors and, consequently, enhances communication (cited in Huwari 2019, 31). In my experience as a teacher in an Egyptian higher education institution, teaching English as a foreign language to Egyptians ranging in their proficiency levels (pre-intermediate to upper-intermediate), I have noticed that Egyptian students face problems with some aspects of English phonetics and phonology. This study was conducted to investigate the key English pronunciation difficulties for Egyptian EFL learners, as well as the factors behind the learners' errors in a contrastive analysis framework.

Arabic and English set examples of languages with two distinct individual grammars that encompass speech characteristics. Therefore, a significant impact of L1 transfer on the participants' pronunciation of English is expected to be the main source of errors. Another factor behind the phonological problems Egyptian EFL learners face could be the inadequacy of some study programmes in the Arab region. Despite the drawbacks underlying English Language Teaching (ELT) policies of the public educational institutions in the Arab world countries and the criticism directed at the graduates of some inadequate study programmes in these institutions, the amount of literature tackling these aspects is still insufficient (Al-Issa et al. 2017). Exploring the Egyptian EFL learners' errors of pronunciation and the underlying sources of those errors would aid drawing pedagogical implications that address the problematic aspects with the aim of improving the existing and future teaching and learning practice in Egypt.

2. The main language varieties in Egypt

The linguistic situation involves two standardised varieties of Arabic: Modern Standard Arabic (MSA)/Literary Arabic and Egyptian Colloquial Arabic (ECA)/Cairene/Egyptian Dialect, and a continuum of other local dialects of Colloquial Egyptian spoken around the country differing from one another in pronunciation, lexicon and to some extent in structure. MSA is the variety of Arabic taught in schools, used in writing, in official mass media and in most formal speech in all Arabic speaking countries, and

based on the Classical Arabic of the Quran and early Islamic literature (Swan and Smith 2001, 195; Javed 2013, 1). The focus of this research will be on the phonological problems of native speakers of ECA, the variety of Egyptian Arabic originated in Cairo, the capital city of Egypt, and understood across most of the Arab region. ECA is mainly a spoken variety; however, it is encountered in vernacular literature, advertisements, social media as well as informal media. Phoneme inventories of consonants and vowels in both MSA and ECA are given below:

MSA Consonant Phonemes (Hassig 2011, 9)

	labial	dental	alveolar	emphatic	palatal	velar	uvular	pharyngeal	glottal
nasal	m		n						
stop	b		d t	dˤ tˤ	dʒ	k	q		ʔ
fricative	f	ð θ	z s	ðˤ sˤ	ʃ		ɣ x	ʕ ħ	h
tap			r						
approximate			l		j	w			

MSA Short Vowels (Hassig 2011, 10)

	Front	Central	Back
Close	i		u
Mid			
Open		a	

MSA Long Vowels and Diphthongs (Hassig 2011, 10)

	Front	Central	Back	Diphtongs
Close	i:		u:	/aj/
Mid				/aw/
Open	a:			

ECA Consonant Phonemes (Youssef 2006, 13)

	Bilabial	Dental	Palatal	Velar	Uvular	Pharyngeal	Glottal
Stop	b bˤ	t tˤ d dˤ		k kˤ g gˤ	q		ʔ ʔˤ
Fricative	f fˤ v vˤ	s sˤ z zˤ	ʃ ʃˤ ʒ ʒˤ	x xˤ ɣ ɣˤ		ħ ħˤ ʕ ʕˤ	h hˤ
Nasal	m mˤ	n nˤ					
Lateral		l lˤ					
Trill		r rˤ					
Glide	w wˤ			j jˤ			

ECA Short Vowels (Hassig, 2011, 12)

	Front	Central	Back
Close	i		u
Mid			
Open	a		aˤ

ECA Long Vowels and Diphthongs (Hassig, 2011, 12)

	Front	Central	Back	Diphtongs
Close	i:		u:	/aj/
Mid				/aw/
Open	a:		a:ˤ	

3. First language transfer

Lado (1957) states that, in the process of L2 learning, "Individuals tend to transfer the forms and meanings, and the distribution of forms and meanings of their native language and culture – both productively when attempting to speak the language and to act in the culture, and receptively when attempting to grasp and understand the language and the culture as practiced by natives" (cited in El Zarka 2013, 23). This phenomenon is referred to in the literature as **L1 interference**, **L1 (positive/ negative) transfer** or **interlanguage,** and is regarded as a significant factor in the process of L2 learning/acquisition. Richards (1971), for instance, reported that 36% of L2 errors can be attributed to the interference of the learners' L1 (cited in Tushyeh 1996, 110). In addition, (negative) transfer is identified as one of the sources of errors in L2 acquisition according tSelinker's (1972) classification which includes: language transfer, transfer of training, strategies of second language learning, strategies of second language communication, and overgeneralization of TL linguistic material (cited in Ababneh 2018, 247). In their journey of L2 acquisition/learning, learners tend to carry over the rules of their L1 to the system of the target language, which results in some sort of hybrid system that is "neither the L1 nor the L2" (El Zarka 2013, 19). Such impact of interlanguage diminishes as a learner's L2 proficiency improves (El Zarka 2013, 19) and may be further influenced by other factors such as: individual differences of teachers or learners, learning/teaching approaches, techniques, procedures and materials, etc. (Jain 1974,

189, cited in El Zarka 2013, 19). On the other hand, the type of transfer, where the cross-linguistic similarities between L1 and L2 aid the process of acquisition, is considered, and referred to in the literature, as "positive transfer" (El Zarka 2013, 23). Mahmoud (2000, 127-128) states that "transfer may be used as a learning strategy to formulate hypotheses about the target language and as a communication strategy to test these hypotheses" (El Zarka 2013, 23).

Moreover, L1 interference plays a greater role in the acquisition of L2 pronunciation compared to other aspects of L2, and is the main cause behind possessing a "foreign accent" (Celce-Murcia, Brinton, and Goodwin 1996, 20, cited in Barros 2003, 23) that is acoustically similar to the learners' L1 (Avery and Ehrlich 1992, cited in Chouchane 2016, 208). In the context of teaching English to native speakers of Arabic, Marzouk (1993) explored the transfer of L1 vowels and norms of consonant clustering, which was evident in the vowel intrusions in English consonant clusters by Arab learners (cited in Barros 2003, 27). The current study investigates the key English pronunciation difficulties of Egyptian EFL learners through a contrastive analysis (of the phonological systems of Egyptian Arabic and Modern Standard Arabic as the two languages available to the learners before L2, and English as the target language) to see whether the errors are caused by any type of negative transfer of the learners' L1(s), and to shed light on any other factors hindering the acquisition/learning of English pronunciation.

4. Problematic aspects

4.1 Segmental aspects

Any error analysis requires contrastive analysis; contrastive analysis could explain why certain L2 errors occur. Therefore, it is significant to begin with noting the differences in English and Arabic phonetic segments. While RP, the main variety of English taught in Egypt, has twenty-four consonants and twenty vowels (seven short, five long and eight diphthongs), Egyptian Arabic has twenty-eight consonants and only eight vowels (three short and five long). In Arabic, the three short vowels are "graphically represented" through diacritics above or below the letters, but that is not always the case (Martin 2011, 8). Most Arabic texts are generally not "fully vowelized" (i.e. with no representation of the short vowels in script), which means that the one-to-one correspondence between orthography and speech sounds is not always clear (Martin 2011, 8). This can result in Arabic speakers' tendency to confuse the English short vowels and to avoid elisions and contractions (Swan and Smith 2001, 196).

4.1.1 Consonants

English spoken by Egyptian learners is characterised by the failure to realise some phonetic qualities such as the voicelessness of the bilabial plosive /p/, which is replaced by its voiced counterpart /b/, the closest alternative in the phonemic system of Arabic. Generally, for the native speakers of Arabic, [b] and [p] are allophones of the same phoneme when heard (Nasr 1997, 24; Swan and Smith 2001, 197). The word bray /ˈbreɪ/ can overlap with pray /ˈpreɪ/, resulting in communication problems or misunderstandings. This mispronunciation of /p/ may impact other phonemes resulting in more pronunciation difficulties pertaining to assimilation. Different types of assimilation (including voicing and devoicing assimilation) are common in ECA. Thus, Egyptian learners carry it over to their English. For instance, in a word like speak /ˈspiːk/, regressive assimilation occurs when /s/ is assimilated in voicing to /b/, substituted for /p/, resulting in [zbiːk].

Another feature is replacing the voiceless palato-alveolar affricate /tʃ/ with the voiceless palato-alveolar fricative [ʃ] (e.g. chair /tʃeə(r)/ can overlap with share /ʃeə(r)/). /tʃ/ does not exist in the phonological system of MSA as a separate speech segment, but exists in some dialects of Arabic in junctures of /t/ and /ʃ/ (Swan and Smith 2001, 197). In ECA, it neither exists as a separate segment nor in junctures.

It is also observed that the velar nasal /ŋ/ is mispronounced by many Egyptian learners in words where the consonant is represented by the two letters n and g, especially in the –ing suffix (e.g. hearing /ˈhɪə.rɪŋ/ pronounced as [ˈhɪə.rɪng]) (Ahmad 2011, 24). Both the alveolar nasal [n] and the velar nasal [ŋ] exist in Arabic, but as allophones of the same phoneme /n/ (Kharma and Hajjaj 1989, cited in Elmahdi and Khan 2015, 95).

Other phonemes, such as /dʒ/, /θ/ and /ð/, could also be problematic since they are not used in ECA despite the fact that they exist in the MSA phonemic system. The voiced palato-alveolar affricate /dʒ/ exists in the phonological systems of MSA and some dialects of Arabic. Nevertheless, it is replaced by the voiced velar stop /g/ in ECA (Swan and Smith 2001, 197; Javed 2013, 8) or simplified to the voiced palato-alveolar fricative /ʒ/ in other Egyptian dialects. In their pronunciation of English, Egyptian learners tend to replace /dʒ/ by [ʒ] due to the familiarity with [ʒ] that exists in loanwords like: garage /ˈɡær.ɑːʒ/ and beige /beɪʒ/. Another similar case is that of the dental fricatives, both voiceless /θ/ and voiced /ð/. MSA /θ/ is rendered as either a voiceless dental stop /t/ or a voiceless alveolar fricative /s/ in ECA (e.g. MSA /ˈθæni/ 'second' (an adverb) is [ˈtæni] in ECA, while MSA /ˈθæbɪt/ 'stable' becomes [ˈsæbɪt] in ECA). In their pronunciation of English, Egyptian learners tend to replace /θ/ by /s/. Likewise, /ð/ is rendered as either a voiced dental stop /d/ or a voiced alveolar fricative /z/ in ECA (e.g. MSA /ˈðʊrʌh/ 'corn' is [ˈdʊrʌh] in ECA, while MSA /ʊsˈtæð/ 'mister' becomes [ʊsˈtæz] in ECA). In their pronunciation of English, Egyptian learners tend to replace English /ð/ by /z/. It is noticed in the previous examples of word mispronunciation that the Egyptian

learners can change the manner and place of articulation, but preserve the voicing quality of segments.

Some other errors arise from the notion that one phoneme can differ in nature between Arabic and English though it exists in both languages. Although the voiceless glottal fricative consonant /h/ exists in both Arabic and English, the Arabic /h/ is articulated from further back in the throat and with harsher aspiration compared to its English counterpart. This is a reason why Arabic speakers, generally, tend to pronounce the English /h/ "rather harshly" (Swan and Smith 2001, 197). Similarly, unlike English, the Arabic /r/ is realised as a voiced flap (Swan and Smith 2001, 197) or a trilled consonant. Consequently, Egyptian learners tend to overpronounce initial /r/, post-vocalic /r/, and similar to speakers of other dialects of Arabic (e.g. Saudi learners; Elmahdi and Khan 2015, 94), it appears to be more problematic for Egyptian learners when it occurs in final position.

Similar to Arab learners of English in general, Egyptian learners are spelling-conscious. Unlike what occurs in natural order of language acquisition, the spelling/written forms of English are available to the learners before their pronunciation; an approach adopted by an exam-oriented educational system that focuses solely on written accuracy. Besides, the phonetic system of Arabic is closely related to its writing system, and learners seem to approach foreign languages in the same way they approach their L1(s). These may explain why the pronunciation of an English word can be greatly influenced by its spelling when a consonant is doubled in a word. Another reason could be that Arabic has what is called "doubling" or gemination of a consonant in pronunciation marked in script by what is called a "double-consonant diacritical mark" (Javed 2013, 8-9) placed above the consonant. Therefore, for an Egyptian learner, double letters in an English word could be equal to geminates (e.g. pronouncing *comment* /ˈkɒm.ent/ with a geminated /m/ as [ˈkɒm.ment]). English spelling also influences the production of some errors related to the pronunciation of final inflectional *-ed*. *-ed* is both perceived and pronounced as either [d] or [ɪd] even in the cases when it is preceded by a voiceless consonant. In words like *touched*, *judged,* and *fixed*, *-ed* is pronounced as [ɪd] and in words like *laughed*, *swiped* and *smashed*, it is pronounced as [d].

4.1.2   Vowels

The English vowel phonemes /ɪ/, /æ/, /ʌ/, /ɒ/, /ʊ/, /iː/, /aː/, /ɔː/, /uː/, /aɪ/, /ɔɪ/ and /aʊ/ have equivalents or near equivalents in Arabic. Thus, they are generally less problematic in terms of reception and production although some overlaps may still occur (Swan and Smith 2001, 197). On the other hand, the vowels /e/, /ə/, /ɜː/, /əʊ/, /eɪ/, /eə/, /ɪə/ and /ʊə/ may cause more problems. For instance, due to the learners' familiarity with /ɪ/, it often replaces /e/, which may result in confusing *bed* /bed/ with *bid* /bɪd/. Moreover, the /ə/ is given more stress and length in pronunciation. Besides, the Egyptian pronunciation of /ə/ is greatly influenced by the spelling

(e.g. a schwa is pronounced as /æ/ in *about* /əˈbaʊt/, /ɪ/ in *pencil* /ˈpen.səl/ and /ɒ/ in *season* /ˈsi;.zən/. /ɜ;/ is one of the most problematic vowels. It is hard to perceive and is usually pronounced as [ɪ] (e.g. *girl* /gɜ;(r)l/ is pronounced as [gɪ(r) l]). Generally, diphthongs, such as /aɪ/, /aʊ/, /ɔɪ/ and /əʊ/ (or /oʊ/ as in GA), are made shorter. Besides, [e;] replaces the English diphthongs /eɪ/ and /eə/, which Egyptians often confuse. This could make the diphthongs in *state* /steɪt/ and *square* /skweə(r)/ sound similar. /əʊ/ or /oʊ/ are hard to perceive and articulate, and often altered to [ɔ;] (e.g. *no* /nəʊ/ or /noʊ/ becomes [nɔ;]). Similarly, /ʊə/ is altered to [u;] (e.g. *poor* /ˈpʊə(r)/ becomes [ˈpu;(r)]), and /ɪə/ is often altered to [i;] (e.g. *clear* / klɪə(r)/ becomes [kli;(r)], which can make words like *hear* and *he* sound the same when learning RP).

4.1.3 Consonant clustering

Compared with English, Arabic has far fewer consonant clusters in the initial, medial and final positions. The maximum number of consonants in a medial or final cluster is two in all varieties of Arabic. According to Bauman-Waengler (2009), "In contrast to English, which has 78 three-segment clusters and 14 four-segment clusters occurring at the end of words, Arabic has none" (cited in Elmahdi and Khan 2015, 93). To facilitate the pronunciation of English clusters, Egyptian learners attempt to declusterise them by preceding the cluster starting with /s/ by a prothetic [ʔɪ]: *spoil* /spɔɪl/ and *stood* /stʊd/ become [ʔɪspɔɪl] and [ʔɪstʊd] (cf. Broselow 2015, 295, Khalifa 2020, 160–162). In other cases, learners resort to inserting short vowels in between the consonants in a cluster as an attempt to facilitate its pronunciation (Swan and Smith 2001, 198) (e.g. initial: *flat* /flæt/ is rendered as [fɪlæt]; medial: *extra* /ˈek.strə/ as [ˈek.ɪs.tɪrə]; final: *text* /tekst/ as [tɪ. kɪst]). Such mispronunciations result in different syllable divisions whereas some involve a change in syllable stress. This suggests that Egyptian learners do not find it challenging to pronounce a medial or a final cluster of two consonants as this resembles the rules of clustering in their native tongue which cannot involve more than two consonants together. Swan and Smith (2001, 198) argue that these examples of consonant cluster mispronunciations could also be carried over into English word spelling by Arab students.

4.2 Suprasegmental aspects

4.2.1 Rhythm and stress

Similar to English, Arabic is a stress-timed language (Swan and Smith 2001, 198). However, the nature of word stress in Arabic is more "regular" and "predictable", and primary stresses are more common in Arabic than in English (Swan and

Smith 2001, 198). Regarding elisions and contractions, they are less common in the Egyptians' pronunciation of English. Fraser (2001)'s observation that the pronunciation of learners of English as a foreign language is characterised by an inappropriate placement of stress holds for Egyptian speakers, too. The English pronunciation of Egyptian speakers is characterised by more stressed syllables and heavier rhythm than in English. English unstressed syllables by Arab learners in general are given more time and stress, with "neutral" rather than "swallowed" vowels (Swan and Smith 2001, 198). In addition, Arab learners have difficulties understanding the "unpredictable nature of English word stress" and how it can change meaning and/or word class (Swan and Smith 2001, 198). Nevertheless, according to Swan and Smith (2001), phrase and sentence rhythms should be less problematic for native speakers of Arabic due to their similarity in both languages.

4.2.2   Linking (Juncture)

Arabic pronunciation is rich in the use of glottal stops before initial vowels, which might be a reason for the tendency of Arab learners in "breaking up the natural catenations of English" that involves "linking a final consonant with a following initial vowel" (Swan and Smith 2001, 196–199). Egyptian learners also resist changes that are produced from: (1) connected speech intruding /j/, /w/ and /r/ as in: *stay up* [steɪ j ʌp], *go out* [gəʊ w aʊt] and *law and order* [lɔ; r ən ɔ;də] to link a final vowel with a following initial vowel, (2) consonant elisions as in: *and me* [ən mi;] and *tell him* [tel ɪm], (3) junctures resulting in consonant clusters such as in *next spring* (example from Swan and Smith 2001, 199) which will result in insertions of extra vowels in the Egyptian pronunciation of English, and (4) junctures of certain phonemes such as /t/ followed by /j/ in connected speech, as in *first year* [fɜ;stʃɪə(r)], or /d/ and /j/ as in *had you?* [hædʒə].

5. Problems with the current teaching methods and materials

Evaluating English textbook series used in Egyptian primary schools, Abdallah (2016) states that both textbooks and teachers devote limited to no time to the "elaboration and practice" of the pronunciation activities presented. Besides, the books fail to comprise the necessary phonological and communicative aspects of English. Compared to reading and writing, teaching pronunciation with its elements (e.g. sound production, rhythm, stress, intonation, etc.) is considered a less important skill to teach in the Arab world (Mehawesh and Huwari 2015, cited in Huwari 2019, 31). One of the principal criticisms directed at most language courses/materials is that they involve activities and practices that could be employed in numerous foreign language learning/teaching contexts without taking into consideration the uniqueness of each context. A widely known book taught to intermediate to

advanced EFL learners (including English language majors) in many Egyptian higher educational institutions is O'Connor (1980). The book is described by its author as a guide that "provides a thorough and a systematic introduction to the pronunciation of English" and remains one of those books targeting non-native speakers of English. The book includes a variety of practice exercises that require devoting much learning time and effort contrasting individual segments that are not confused by Egyptian learners. For example, unlike for speakers of some languages, the differences between the initials in *fought* and *thought*, *shop* and *genre* and finals in *breed* and *breathe* do not need to be highlighted for the Egyptian speakers of English. Instead, efforts should aim to design activities stressing the differences between segments such as those constituting the initials in *shoe* and *chew*, and finals in *breeze* and *breathe*, to overcome the pronunciation challenges faced by Egyptian EFL students. Moreover, in an appendix towards the end of the book, O'Connor (1980, 138–139) provides tips for teachers of speakers of Arabic, Cantonese, French, German, Hindi and Spanish based on phonological facts pertaining to these languages, aiming to provide the elements that should be focused on when teaching English pronunciation to these language groups taking into consideration the linguistic background of the learners. Nevertheless, written from a perspective of a non-native speaker of Arabic, not all of these conclusions are relevant in the context of teaching English pronunciation to Arabic speakers, and some could be misleading and might not necessarily apply to Egyptian Arabic speakers. For instance, /ʒ/ is not often confused with /z/ or /ʃ/ as it simply occurs in everyday usage of loanwords from Persian and French. In addition, /dʒ/ is not replaced by /tʃ/; both are problematic for speakers of Egyptian Arabic and they are replaced by /ʒ/ and /ʃ/ respectively. The vowel /e/ does not replace /ɪ/ as mentioned; what happens is actually the opposite. Moreover, /ɜ:/ is not replaced by /e/ or /ʌ/; it is often replaced by the phoneme corresponding to the spelling. /e/ does not even exist in any variety of Arabic and speakers are not familiar with it.

6. Methodology: sampling, data collection and participants

The sample studied was a collection of 70 video recordings of English conversation classes where student talk was more dominant so that there would be as much space as possible for a sufficient amount of student oral production and reception to be analysed. The recordings were in forms of: 15 in-class teacher-student role plays, 8 student-student role plays, in addition to 20 in-class individual presentations, 5 in-class pair presentations, 16 online individual presentations and 6 online pair presentations). The total length of the recorded content is 5:44:36 hours (ranging in length between 1:06 and 14:52 minutes each). Recordings were made via Zoom by the researcher, in class by the teachers or at home by the students in case of online classes or presentations available as an alternative to traditional

classroom sessions in the time of the pandemic. The data were collected using semi-structured observation. The researcher's plan was to observe the speech of the student participants, following the observation by note taking, with the students' pronunciation errors as the research agenda. To avoid any threats to the validity of the results, the acoustically unclear target content was excluded from the data. Additionally, the research advisor of the author was involved as a judge after the data analysis had been finalised for the discussion and evaluation of the analysis to enhance the accuracy of the analysis and reliability of the conclusions. Teacher participation occurred in the forms of "interruption", "topic control" and "enforcing explicitness" (Fauzan 2017, 132).

The data were collected within a time span of one semester (fall semester of the academic year 2021-2022) using convenience sampling. Participants are 91 university students (61 males and 30 females) of my colleague teachers. In addition, they varied in their English proficiency levels (pre-intermediate to advanced, with a range of test scores of 20-50/50 on the Cambridge English Placement Test on: reading, writing and listening taken as a prerequisite for joining their study programmes). They belonged to four different faculties: Engineering, Logistics, Computer Science and Business, where English was the language of the study programmes: instruction, examination, textbooks and study materials. In their programmes, students were required to take English for Specific Purposes as well as English as a Foreign Language classes for three semesters (consecutive or separate) during their study years at the university. The study involves participants from different educational backgrounds (foreign-language medium schools and Arabic-medium schools), as well as social/geographical backgrounds to ensure that members of as many sectors of the target population (Egyptian EFL learners) as possible are represented in the sample. However, differences pertaining to gender, educational and geographical backgrounds, study majors, English proficiency levels, and influence of other local dialects of Egyptian Arabic were not investigated in this study.

To overcome any problems that might be encountered during the research project, and to ensure the absence of any safety or ethical issues in such a study that involves observation and technical analysis, the recorded material was stored and used only for the purposes of this research anonymously with no indicative details of a person, a place, etc. Consent was obtained from the Head of the English Department, who was himself one of the teachers, as well as the students and other participating teachers. Both teachers and students were also thoroughly informed about this research and its objectives, and were assured that their participation was entirely voluntary and that they had the right to withdraw at any point of time for any reason(s).

The recorded content was analysed in terms of three main parameters of pronunciation: phonemic quality, accuracy of production and duration of the segments (Martin 2013, 267).

7. Findings

7.1 Segmental features

1.   Consonants
     The first feature concerning the pronunciation of consonants in the ana-
     lysed corpus was found to be consonant alteration. The data reflected some
     inconsistencies regarding the pronunciation of certain consonants. Those
     inconsistencies included:
1.1. The alteration of /ð/ to [z], a mispronunciation which also occurs in the
     ECA-MSA transfer, in words such as: *that*, *the*, *together*, *other*, *there*, *their*,
     they, *them* and *whether*. However, in words such as: *rather*, *then* and *than*,
     /ð/ is pronounced properly while *this* was pronounced correctly at times and
     mispronounced at others (e.g. twice compared to five times, respectively,
     by one of the speakers). No instances of articulating /ð/ as /d/ as reported in
     Barros (2003) where data by Egyptian speakers were studied.
1.2. The alteration of /θ/ to [s], a mispronunciation which also occurs in the
     ECA-MSA transfer:
1.3. While /θ/ was altered to [s] in words like: *something*, *thousand* and *thirty*,
     it was noticed to be pronounced properly in *thing* and *three*.
     The alteration of /p/ to [b] (phonemes that are considered as allophones/"-
     submembers" of the same phoneme in Arabic, Nasr 1997, 24; Swan and
     Smith, 2001, 197):
     For some participants, /p/ was pronounced as [b] in initial position (e.g.
     presentation), medial position (e.g. *examples*; *important*) as well as final
     position (e.g. *hope*). On the other hand, it was realised as [p] in all word
     positions by the same speakers in: *purpose*, *percent*, *please* and *people*, as
     well as other speakers in: *part*, *points*, *problem*, *steps*, *stopping*, *spot*, *speech*,
     typical and *drop*), but with less or no aspiration. For some other speakers,
     it was articulated as [b] in all positions.
1.4. The alteration of /dʒ/ to [ʒ] (an example existing in ECA loanwords):
     While many participants tended to simplify /dʒ/ to [ʒ] in words like: *major*,
     subject, *stage*, *jolt*, *energy*, *job* and *just*, others could manage to properly
     pronounce /dʒ/ in words like: *language* and *psychology*.
1.5. The alteration of /tʃ/ to [ʃ] (an example existing in ECA loanwords):
     Similar to the previous instance of consonant alteration, /tʃ/ was found to be
     simplified to [ʃ] in some words like *questions*, *slouching*, *research* and *search*
     when other participants pronounced the affricate correctly in *approachable*
     and *achieve*.
1.6. The alteration of /v/ to [f]:
     [faɪf] for *five*, as an example, was a rare occurrence (one occurrence).

The previous list of pronunciation inconsistencies can be explained within the framework of the concept "mistakes" versus "errors" by Bartram and Walton (1991, 25). To help identify and overcome the pronunciation problems for the learners, Bartram and Walton (1991) distinguished between "errors" and "mistakes". According to them, "Mistakes are caused by the learners not putting into practice something they have learned while errors are caused by the learner trying out something completely new and getting it wrong" (Bartram and Walton 1991, 25). On the other hand, errors are a product of the learners' lack of knowledge. Therefore, those examples of inconsistent pronunciations of the same phoneme, sometimes by the same speaker(s), fit in the category of "mistakes" (knowing the rules of pronunciation, but failing to apply them in practice at times).

Moreover, the data also showed consistent occurrences of consonant altera-tion. The velar /ŋ/ was changed to a combination of the alveolar /n/ and the velar /g/ in words where it represents the two letters n and g (the -ing suffix) (e.g. *smiling*, *giving*, *during*, *upsetting*, *getting*, *listening*, *identifying*, *working*, *making*, *looking*, *gaining*, *reading*, *morning*, *according*).

Another category of mispronunciations included features pertaining to con-sonants differing in nature between Arabic and English while existing in both languages. For instance, an overpronunciation of initial and post-vocalic [r] was a noticeable feature in the corpus. The [r] resembled that of Arabic (trill) rather than an English approximant in words like: *for*, *more*, care, *sure*, *rehearse*, *ensure*, *your*, *before*, *first*, *related* and *clear*. In addition, the Egyptian Arabic-like pronunciation of [l] (palatal) was dominant in all phoneme positions over the English nature of the phoneme (alveolar) in words such as: *film*, *still*, *clearly*, *little*, *finally* and *liter-ally*. The phonemes /t/ and /d/ were also pronounced as denti-alveolar rather than alveolar consonants and with no aspiration.

2.   Consonant clustering

According to Watson (2002, 56), "Most eastern Arabic dialects exhibit a fairly limited range of syllable types. Three basic syllables are attested in Cairene … CV, CVV, and CVC" (cited in El Zarka 2013, 27). This could explain why Egyptian EFL learners find it challenging to grasp the syllable patterns possible in English. As a result, in the analysed corpus, the learners resorted to two main repair strategies, involving both improper syllable divisions, as well as phoneme changes, to facilitate cluster pronunciation:

2.1.   Declusterisation by **inserting short vowels** in between the consonants in a cluster (e.g. [i] or [ɪ] in initial pr- cluster in *presentation*, final two and three-consonant clusters: /tʃt/ in *reached* [ˈriːt.ʃɪd], /-nθs/ in *months* [ˈmʌn. sɪz], /-rnd/ in *learned* [ˈlɪr.nɪd], /-rst/ in *first* [ˈfɪ.rɪst], /-kst/ in *next* [ˈnɪ.kɪst], /-rks/ in *networks* [ˈnɪt.wɔːrˈkɪs], /-znd/ in *thousand* [ˈθaʊˈzand] , and [a] in final -nl in: *personal* [ˈpɪrˈsɔːˈnal]).

2.2.   Unlike in some varieties of Arabic (e.g. Tunisian and Moroccan), "CVCC is restricted to … utterance-final position in Cairene: (Watson 2002, 59, cited in

El Zarka 2013, 30-31). This could explain why Egyptian EFL learners have more issues with final consonant clusters in English compared to speakers of other native Arabics.

2.3.   Onset insertion: this entailed preceding the cluster starting with /s/ by a prothetic, a combination of a glottal stop [ʔ] and a vowel, usually [ɪ], (e.g. [ʔɪs.tæ.tɪs.tɪks] for *statistics*). According to El Zarka (2013, 33), prothesis is "a common repair strategy employed by native speakers of Arabic learning English."

3.   Vowels

Similar to the segmental consonant pronunciation, one main feature characterising the pronunciation of vowels by the Egyptian EFL learners was found to be vowel alteration. Some manifestations of vowel alteration included:

3.1.   Monophthongs

3.1.1. Failure to produce the schwa:

Egyptian learners found the pronunciation of the vowel /ə/ very challenging. Consequently, the vowel was replaced by other vowels that were more familiar to the students. Instances of replacing vowels included:

[ʌ] in

– the final syllables of: *structure*, *maximum*, *focus*, *colour* and *introduction*.
– the -er ending nouns: *user*, *designer*, *computer*, *better*, *deliver*, *answer*, *after* and *later*.

[a] in

– the -tion or -sion ending words: *presentation*, *connection*, *conclusion*, *education*, *section*, *relation*, *perception*, *recognition* and *optimisation*.
– the first syllable of: *statistics*.
– the final syllables of: *importance* and *common*.

[ɪ] in

– the second syllable of *current*

All syllables of: *comfortable* [ˈkɒmˈfɒrˈteˈbɒl]

This instance of mispronunciation also involved misplaced stress (stress equally placed on all syllables). According to Kenworthy (1987, 18), the stress shift in comfortable could cause the word *comfortable* to be confused with the phrase/sentence "come for a table", which may lead to threats to mutual intelligibility and effective communication (cited in El Zarka 2013, 32).

The data also showed failure to realise the schwa resulting from vowel reduction in connected speech: (e.g. *to leave*).

3.1.2. The alteration of /e/ to:

[ɪ]: (e.g. *less*, *stress*, *steps*, *get*, *better*, *next*, *best*, *hesitate*, *networks*).
[ɒ]: (e.g. "technology", a mispronunciation that can be regarded as an influence of how the word is pronounced in its adaptation in ECA).

3.1.3. The alteration of RP [ɑ;] or GA [æ] to [ʌ]:

(e.g. the vowel in *start*; the final syllable of *paragraph*).

3.1.4. The alteration of RP [ɔ;] or GA [ʊ] to [u;] in *your*. This example of mispronunciation could be attributed to confusing the vowel in *your* with that of *you* (/u;/) and overapplying familiar pronunciation rules to words that are similar in form and/or meaning.

3.1.5. The alteration of /ɜ;/ to:
   [ɪ]: (e.g. *first*; *serve*)
   [ɔ:]: (e.g. *network*)

3.1.6. The alteration of /ɪ/ to **[aɪ]**: (e.g. *determine* /dɪˈtɜ;(r)mɪn/ to [dɪˈtɜ;(r)maɪɪn]) The vowel change here could be regarded as an instance of overapplication due to familiarity with the different meanings and word classes of "mine". Apart from vowel change, the data also reflected other characteristics regarding the accuracy of monophthong production: vowel deletion (e.g. omitting the second vowel in *hesitate*) and change of vowel length. Some short vowels were made shorter (e.g. /æ/ in *stand* and GA chances pronounced as [a]), Short vowels were made longer (e.g. /ɪ/ in *live* pronounced as [i;]) and long vowels were made short: (e.g. /i:/ in *fifteen* pronounced as [ɪ]).

3.2.   Diphthongs
   Learners failed to produce some diphthongs and tended to simplify their pronunciation through approximating them to the closest single phonemes whether short or long. Some examples included:

3.2.1. The alteration of /eɪ/ to:
   [e;**]** in medial position (e.g. *state*, *take*, *make*, *space*, *stage*, *weight*, *straight*, *face*, *raise*, *presentation*, *consideration*, *dictate*, *update*, *relation*, *hesitate*) and to **[**e;(h)**]** in final position (e.g. *okay*).
   [i;] (rare occurrence): (e.g. [ti;k] for *take* and [mi;t] for *mate*).

3.2.2. The alteration of /ʊə/ to [u;]: (e.g. *ensure*)

3.2.3. The alteration of /aɪ/ to [ɪ]: (e.g. *website*; one occurrence).

3.2.4. The alteration of RP /əʊ/ or GA /oʊ/ to [ɔ;]: (e.g. *so*, *social*)

3.2.5. The alteration of /a-/ in /aʊ/ into a more front [a]: (e.g. *how*, *now*)

3.2.6. Another feature in relation to the production of diphthongs was vowel insertion. Learners tended to insert [ɪ] in between the combination of a diphthong followed by a consonant (e.g. between /aʊ/ and /t/ in *about*, between /aɪ/ and /d/ in *identified*).

4.   Word spelling had an evidently remarkable influence on the production of certain consonants and vowels. Some examples of spelling influence included:
   – Pronouncing "of" as "off"
   – Pronouncing the plural morpheme -s in words like *friends*, *sounds* and *trends* as [s]
   – Pronouncing the final inflectional -ed as either [d] or [ɪd], but never as /t/: (e.g. final -ed as [d] in *based*, resulting in what is known as "regressive assimilation", [be;zd] instead of /beɪst/).

– Articulating the vowel in *boost* as [ɒ].
– Articulating *compose* with [s].
– Pronouncing the weak vowel schwa depending on the letter representing the phoneme. This was exemplified in:
- An alteration of /ɪə/ to [ɪʊ] (e.g. in *podium*).
- An alteration of /ə/ to a short o, [ɒ], (e.g. first syllables of: *continue*, *today*, *consideration*, *comfortable*, *condition*, *connection*; second syllable of *introductory*).
- An alteration of /ə/ to [æ] (e.g. *about* and *additional*) or to [(ɪ)æ] (e.g. *social*).
- An alteration of /ə/ to a short u, [ʊ], in all occurrences of words with the suffix -ful (e.g. *successful*).
- An alteration of /ə/ to /ɔ;/ in the second syllable of the word *comfortable*.
- An alteration of both /ə/ and the diphthong in *compose* to a short o [ɒ].

– The influence of spelling was also evident in the gemination of sounds corresponding to the letters doubled in: *affect*, *appear*, *annoy*, *hello* and *additional*, *connection*, *collection*.

5. Although it is beneficial for teachers to be aware of some pattern that would enable them to predict any probable mispronunciations based on the errors/ mistakes their learners tend to produce in a foreign language, the data depicted a group of mispronunciations that are considered unusual for the Egyptian EFL learners and cannot be explained in a contrastive analysis framework. The following examples are some mispronunciations that involve phoneme alteration, vowel length change, phoneme insertion and misplaced stress: [rɪuˈsɪum] for *resume*, [reˈle;vant] for *relevant*, [ɪnˈdʌktori] for *introductory*, [ˈannɔ;ɪdɪd] for *annoyed*, [ˈanɪstɪd] for *instead*, [ˈʌnˈtʌrˈrʌpt] for *interrupt* and [ˈsaʊsant] for *thousand*.

Suprasegmental features

Keeping correct segmental patterns of English pronunciation appeared to be more problematic than the suprasegmental elements in the corpus studied. However, the learners also exhibited other issues pertaining to some suprasegmental elements such as word stress as well as features of connected speech.

6. Word stress

Issues with proper placing of stress for native speakers of Arabic in general is attributed to "the differences of both syllable structures and stress patterns in Arabic and English", and the way the stress is shifted "reflects the native stress pattern" (El Zarka 2013, 49). In the present data, pronunciation inaccuracies related to word stress included**:**

6.1. Misplacement of stress:

(e.g. *ideas* [ˈaɪˌdɪəz], *universities* [ˌjuːnɪvɜːˈsɪtiz])

6.2. More stress to the unstressed syllables:

Stress was placed equally on all syllables in: *proper*, *Facebook* and *interested*. Moreover, the data showed a tendency to transfer the enthusiastic nature of Arabic speech to the articulation of English, which influenced the rhythm and melody of the learners' English. In accordance with Swan and Smith (2001, 199), describing the rhythm of English speech uttered by Arab learners of English in general as "staccato", the pronunciation of the Egyptian EFL learners in the current study was also characterised by heavier rhythm.

7.   Connected speech/Juncture

7.1. Lack of smooth junctures that involve linking a final consonant with a following initial vowel.

(e.g. *I hope you are fine* and *stand out*).

This could be attributed to the nature of connected speech in English compared to that of Arabic. Kenworthy (1990, 9) states that connected speech in English is characterised by smooth movements due to the use of linking while, in connected speech of Arabic, pauses between words are far more frequent (cited in Mubarak and Rahi 2017, 30). Furthermore, glottal stops are very common before initial vowels in ECA and MSA, which can influence the smoothness and rhythm of speech in the production of English by native speakers of Arabic. Another remarkable difference is that linking in Arabic is both phonological as well as orthographical (reflected in script) while, in English, it is only phonological (Mubarak and Rahi 2017, 35). These differences in the nature of juncture in English and Arabic explain why Egyptian learners in the current study tended to miss out the aspects of smooth linking in English. Nevertheless, it is worth noting that such a feature does not fall into the category of errors/mistakes. It is rather a non-native norm which could also manifest in speech by native speakers of English in certain contexts.

7.2. Resistance to changes produced from:

7.2.1. consonant elisions across word boundaries:

(e.g. *and today*, *team mate*, *and welcome*, *good day* and *and good bye*).

Native speakers of Arabic do not allow the meeting of two consonants across word boundaries in articulation, and in most cases, they tend to link the two consonant sounds by inserting short vowels in between (Mubarak and Rahi 2017, 35). This explains the learners' tendency to avoid the elision of consonants across word boundaries in the 7.2.1. examples above.

7.2.2. the production of:

– The voiced affricate /dʒ/ in the junction of /d/ and /j/: (e.g. *around you, drop*),

– The voiceless affricate /tʃ/ in the junction of /t/ and /r/: (e.g. *try*, *interrupt*), and

– Connected speech intruding /w/ linking a word-final vowel with a following initial vowel: (e.g. *you are* [juː aːr]).

The learners' inability to use consonants as linking sounds in connected speech is a result of the transfer of the native patterns of Arabic. Although both Arabic and English employ linking "to make their pronunciation fluent and natural", the types of sounds inserted to facilitate the production of an "uninterrupted speech" are different (Mubarak and Rahi 2017, 34). According to Mubarak and Rahi (2017, 35) "the linking sounds in English are consonant sounds while in Arabic are vowel sounds". Unlike in English where consonants such as [j], [w], or [r] are used, Arabic uses vowels as linking sounds in connected speech (Mubarak and Rahi 2017, 35).

8. Conclusions, significance, and recommendations for future research

In this study, the researcher applied both a contrastive and error analysis to the corpus collected with the aim of providing insights for the researchers, educators as well as curriculum planners to bring about useful strategies to address the outcome problematic pronunciation aspects faced by the Egyptian EFL learners. The analysis showed that most of the phonological challenges are a product of the influence of the learners' L1 (Egyptian Arabic) on the target language (EFL) practice manifested in a series of negative transfer instances. Nevertheless, some were caused by the lack of knowledge of the L2 rules and/or the inadequacy of training available for the learners. This goes in line with Fraser (2000) in which the challenges the pronunciation component creates in the EFL/ESL classroom are attributed to the lack of word cognition and the way the English sound system works rather than the physical process of articulation itself.

The study contributes to the research aimed to outline the phonological aspects that should be prioritised when teaching English to Egyptian EFL learners. This could be achieved in light of some EFL framework such as the Lingua Franca Core (LFC) Model by Jenkins (2009) and Patsko (2013) and, accordingly, there will be access to the teaching implications that would aid designing/choosing the most effective EFL teaching materials and techniques as well as study programmes that both address the problematic aspects and are relevant to their sociolinguistic and sociocultural learning/teaching contexts as a step towards improving the existing practice.

Further research should explore other suprasegmental aspects such as intonation. In case the research is conducted in a similar context, future researchers could adopt Brazil's (1997) "discourse intonation" model where selecting and deselecting certain sets of intonation patterns are believed to convey a communicative significance or "interpersonal meanings". The Model focuses on prominence, pitch range, termination and choice of tone (Cheng 2015).

Future research should seek feedback from the learners and teachers, through administering questionnaires and/or interviews, to gain insights to the extent to which they agree or disagree with what the current study has yielded. Furthermore,

exploring the learners' views on their own performances (to see if there is a gap/discrepancy between what they think they do and what they actually do in terms of performance), expectations from their lecturers and study programmes, desired proficiency criteria/standards, attitudes towards English and the specific items they are learning, the influence of mother tongue, the challenges they face in learning English pronunciation, what they think they lack and what they would like to see applied in textbooks and classrooms (e.g. organised activities/behaviour/approaches/methods) will pave the way for the research outcomes to tap into the participants' educational needs. Future research could also consider the study of variables such as: gender, age, educational backgrounds, teaching/learning contexts, dialectical regions, study majors and English proficiency levels, as well as acoustically conducting a quantitative analysis through the use of some speech analysis software to give a clearer picture as far as the problematic aspects of pronunciation are concerned.

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EMI in Higher Education: Current Challenges

Abstract: English Medium Instruction (EMI) consists in delivering content in English to students who are non-native speakers of English. With English becoming a supranational and intercultural tool of professional and academic communication, EMI is being introduced by various entities in higher education at a rapid pace in different parts of the world. The focal point of the present research on EMI is the collection of data provided by teachers and students regarding their attitudes toward EMI. Along with the immediate spread, numerous doubts have emerged that need to be addressed in order to render EMI more effective and accessible. This paper presents the current literature on the subject of EMI in higher education, where it is primarily present, and aims to recognize and provide an overview of the challenges that teachers and students face in education in which EMI is incorporated. The challenges may be identified in three main areas, that is at the level of policy and social processes, at the level of teacher's agency, and finally at the level of students' perspective. Some of the challenges may be fixed with basic policy changes; however, others, such as the factor of translanguaging, the methodology of establishing linguistic standards, or the process of transition between particular stages of education, require more research into the subject of EMI.

Keywords: EMI, English, Englishization, translanguaging, higher education, native-speakerism

1. Introduction

English Medium Instruction (EMI) is a global, rapidly growing trend of introducing English to teach subjects, excluding English itself, in countries where English is not the first language for most of its residents (Macaro 2018). Richards and Pun (2022) furthermore propose alternative definitions of EMI that expand the role of EMI beyond academia, with the following one worth quoting: "The use of English in multilingual post-colonial societies, where it serves as an official language and

as an academic lingua franca in education and may also function as a community lingua franca alongside other local and official languages". As may be clearly seen, EMI may be considered from various points of view. Some limit its extent to a language as an educational tool, while others include the social consequences that EMI induces.

The greatest growth of this phenomenon may be seen especially in higher education. Regardless of various agendas, most universities worldwide aim to become more internationalized by attracting students from abroad and thus gain prestige or revitalize local demographics (Macaro et al. 2018). Among other general objectives, one may mention the lack of resources available in the local language (Bolton and Kuteeva 2012), national policies such as governmental subsidies, which incite the introduction of EMI (Bradford 2016) or an attempt to render the public universities compete with the private ones (Knight 2013). As the development of EMI is observed all over the world, it is obvious that its implementation is highly context-dependent. In many countries, EMI is favored because of the urge to enhance students' skills to an international level and thus standardize their qualifications. Another incentive is improving students' English language proficiency (Xu et al. 2021). Despite the lack of empirical studies on the consequences of introducing EMI in higher education, there is much confidence in the abundance of benefits that EMI holds. Questions then emerge about whether it is possible to teach a subject in a foreign language without hampering content comprehension, whether English should be the exclusive language in the classroom under any circumstances or whether the approach toward teaching should change when the language of instruction is not students' and teachers' mother tongue. Therefore, there are numerous doubts concerning the implementation of EMI in higher education that need to be taken into account (McKinley, Rose, and Curdt-Christiansen 2022). This paper provides an overview of the social processes and problematic policies induced by EMI as well as challenges that students and teachers face in education at universities that introduced EMI, both at the level of theoretical policies and at the level of classroom practices.

2. EMI in the context of society and policy

Internationalization of the universities most often amounts to Englishization, which is a process of replacing the local language with English. It regards not only lessons as such, but also curricula and administrative documents. Although current research on EMI is already focused on teachers' and students' views, one should not forget that Englishization concerns all the employees at the university, including administrative staff whose readiness to function in an increasingly English-oriented university is often overlooked (Block 2022).

With EMI being essentially born in Europe, it was also adopted in other parts

of the world. One of the concerns expressed by a teacher interviewed by Sah (2022) was the fact that the linguistic context in the Netherlands or Germany is far different from the one present in, for instance, Asian countries. As it is natural for the majority of Western European countries to possess an adequate command of English, it is not always the case in every single country that introduces EMI. Yet, the process of the implementation of EMI does not differ significantly in such countries as if linguistic barriers did not exist.

Dearden (2016) provided an accurate international picture of EMI, having investigated fifty-five countries that adopted EMI in education, with a particular focus on the imposed policies, comparisons between different levels of education, and public opinion about EMI. The study involved countries from five continents, with South America, Europe, Asia, and Africa represented by a balanced number of countries, and North America represented by one country, namely The United States of America. It is worth citing some of the observations to understand the processes behind implementing EMI at national and local levels, as they allow for a greater Englishization not only of the educational sector but also of other fields related to it. Firstly, in almost half of the investigated countries, there do not exist any policies on EMI whatsoever, while more than forty percent of the countries released no official statements as regards EMI, which makes it difficult to understand the government's stance. Out of the official statements and proposed policies, one may learn much about the multifariousness of linguistic and social backgrounds among the countries where EMI is present. In Malaysia, for instance, the already multicultural and polylingual nature of the country constitutes a great setting for EMI to be developed, as students and teachers tend to be at least bilingual. At the opposite pole is Sri Lanka, where, because of its colonial history, the English language has been for many years seen as the reason for the vanishing of the national bonds. Consequently, English was losing its relevance, and only recently the trends have turned around again making it possible to introduce EMI. Macedonian government notices the benefit of organizing student exchanges and, therefore, sees the necessity of boosting students' English skills by introducing EMI. By a similar token, governments in Hungary or Cyprus recognize the need for attracting international students. Japanese or Czech governments, in turn, see EMI as an opportunity to facilitate and make it possible for their own students to study abroad successfully. The need for enhancing the level of students' knowledge and increasing the competitiveness of the country on the international market through EMI is officially recognized by Pakistan and Indonesia. In some countries, however, such as India, despite existing policies as regards English in education, some more specific fields like EMI in higher education are not recognized by any documents at all. In Uzbekistan, EMI is very much welcome, as the official documents do not limit communication in English to be encouraged in education only, but other fields such as economics and politics are mentioned as well.

Another questionable phenomenon caused by the spread of EMI is the local

languages fading out in the educational context, which may impact not only students, but also other residents of a country, due to Englishization in progress. With higher education being taken over by English, other related fields such as academic activities or social landscape might be affected, at expense of the local language. As pointed out by Ntombela (2023), in countries in the Middle East, the perception of English may play a major role in diminishing the importance of local languages. Higher education is very often associated with social development and, what can be observed in countries like Qatar, Bahrain, Saudi Arabia or United Arab Emirates, directly connected with a key to economic prosperity. Consequently, everyone finding themselves in the job market, would likely be affected by the changing attitudes toward shifting to a language that boosts professional prospects. In none of the aforementioned countries has the impact of the implementation of EMI on the image of the local language been considered beforehand. In the study conducted by R'boul (2022), despite generally enthusiastic attitudes toward the introduction of EMI in higher education, the interviewed teachers were well aware of how English would reduce the relevance of local languages, Tamazight and Arabic, in Morocco. All things considered, due to prevailing confidence in EMI benefitting the students on a global market, English seems to enjoy great endorsement there.

However, the need for some kind of protection of the local languages is not overlooked either. Especially in the European Union that had already used English as an educational tool in the form of Content and Language Integrated Learning (CLIL) long before EMI gained in popularity, the awareness of the kind of impact that English may have on the importance of a local language is quite high. CLIL was widely introduced in the EU in the 1990s, with its proponents hoping to facilitate intercultural communication and improve the general level of foreign language proficiency among students. By foreign language, in the overwhelming majority, they meant English even though the very word *English* was not present in the name of that phenomenon; therefore, the awareness of the striking effect of English on local matters is not new in many jurisdictions (Richards and Pun 2022). In some countries investigated in the study conducted by Dearden (2016), apart from incentives for the introduction of EMI, there have been officially expressed concerns about potential threats to local languages and cultures. In the Netherlands, for instance, where English is widely introduced since the early stages of education, the Foundation of Language Defence fought such policies using legal means, in an attempt to protect the Dutch language in the public education sector. In Estonian law, it is stipulated that the official language must be available in every curriculum at every level of education, with such provisions aiming to protect the Estonian language. In Bangladesh, in turn, the main concern is expressed with regard to the local culture and traditions losing relevance in favor of the Western culture, especially among students who educate themselves through EMI. Despite concerns, public opinion in most of the investigated countries still does seem to be

very much favorable toward the introduction of EMI in education.

The rapid expansion of EMI in higher education has caused English to become the basic language of resources, textbooks, and materials for students and teachers who are non-native speakers of English. With more and more resources being available exclusively in English, the process of Englishization seems natural. Even before the official introduction of EMI at their universities, some teachers dealt with the need for the translation of materials into their mother tongue for the sake of teaching. This has likely made the transition to teaching in English smoother for them (Nieto Moreno De Diezmas and Fernandez Barbera 2021). The decision to teach particular academic subjects in English also applies to fields that still may well be taught in the mother tongue of students and teachers (Macaro and Aizawa 2022). The Englishization of universities may be perceived as a product of the free market, as English has become the most useful global tool for scientific and intercultural communication that needs to be facilitated. Therefore, by adopting EMI, universities may compete at the international level (Qiu, Zheng, and Liu 2022). This, however, has left teachers who are non-native English speakers at a disadvantage.

Although the term *native-speakerism* was first used with regard to English language teachers, this bias has been carried on along with the development of EMI (Rose, Sahan, and Zhou 2022). It essentially means favoring native speakers of English over non-native speakers in terms of not only confidence in their linguistic abilities but also general trustworthiness. Native-speakerism hampers the professional growth of students and teachers who have to bear the burden of being non-native speakers and are thus discriminated against by authorities in charge of hiring staff. With native-speakerism being a theoretical notion, prejudice connected with it has taken its toll on the real lives of teachers who experienced engagement inequity as well as unfavorable self-perception (Lowe and Pinner 2016). The latter may result from students' beliefs. According to the study conducted by Moussu (2002) that investigated students' attitudes toward teachers who were non-native English users at an American university, the number of students who would recommend the course conducted by such teachers increased from barely more than a half of the students at the beginning of the course to three-fourths of the students giving their opinions at the end of the course. A similar conclusion may be drawn from other studies present in the subject literature, conducted for instance by Ling (2002), or Ling and Braine (2007), or Goto Butler (2007), which seem to have proven a kind of bias toward teachers for whom English is not the mother tongue. In the study conducted by Gundermann (2014) a vast majority of the interviewed students engaged in EMI programs favored native English over non-native English. This tendency applied to students regardless of their own English proficiency. They would mention, for instance, that a non-native speaker of English might worsen their own pronunciation, as they subconsciously try to adapt their speech to an interlocutor. On the other hand, students did not mind teachers

who were non-native speakers of English, yet the perception that a native-speaker is somewhat a guarantee of education that is trouble-free in terms of the language of instruction was prevalent.

Stemming from deeply-rooted misconceptions, native-speakerism poses a greater challenge for non-native English speakers to be hired as teachers at universities that offer programs in EMI, while native speakers enjoy preferential treatment in the recruitment process. An additional advantage, in the eyes of recruiters, is constituted by a candidate's hands-on experience or a diploma received in an Anglophone country. Exposure to English used by native speakers seems to overshadow the didactic abilities of the teachers at times. With no standards given as regards English competence, native speakers are then trusted instantly to possess a sufficient enough command of the language to teach content in English.

A study conducted by Fortanet-Gomez (2012) seems to put another perspective on this bias, as the investigated non-native English users who attended conferences had no difficulties in presenting their knowledge to other conference participants, yet struggled to deliver the same content in classrooms to students who possessed a lower level of English. It is not yet clear though whether methods used by native speakers, who rely entirely on the English language, are more successful than, for instance, translanguaging, which may only be incorporated by multilingual teachers (Rose, Sahan, and Zhou 2022).

A study conducted by An, Macaro, and Childs (2021) concluded that classes held by native speakers of English involved less student engagement than those conducted by non-native speakers. As the founding director of EMI Oxford Research Group, Macaro admits himself that interactions of students in classrooms where EMI is used need to be thoroughly investigated, as they are undoubtedly connected with teachers' skills and it is teachers' responsibility to strengthen classroom communication (Sahan 2021). A grave obstacle reported by teachers investigated by Nieto Moreno De Diezmas and Fernandez Barbera (2021) though, was that there were usually too many students in their classrooms, which made communication substantially more difficult.

As reported by students in numerous studies, communication in classrooms may prove to be challenging and the notion of native-speakerism hampers their self-confidence. One of the thirteen students inquired by Qiu, Zheng, and Liu (2022) said during a semi-structured interview: "We Chinese students are not willing to participate in classroom discussion. We generally think we are not as good as native speakers. So, we are a bit self-abased. As a non-English native speaker, I feel inferior. For example, if we read the same article, I am slower". A similar conclusion may be drawn from conversations with other students who were not confident enough in their linguistic skills to participate fully in classroom discussions held in EMI. Although there are no objective linguistic criteria that need to be met, some students tend to feel their English proficiency is not adequate. Students' beliefs investigated by Khan (2013) proved that even though students

had no difficulties with comprehension during lectures, they still were not eager to communicate in English.

As EMI is intended for global education, more and more effort is put through linguistic policies on rendering EMI more intercultural and supranational, as communication seems to be crucial and by far more important than native-like accent or Anglophone landscape orientation. Education that incorporates EMI is faced with the challenge of embracing international students of various backgrounds, in terms of economy, ethnicity, and politics as well as students possessing various levels of skills in the English language. Consequently, boosting students' confidence in using English at an international level seems to be possible by promoting the concept of English as a medium of instruction and communication rather than a perfect linguistic model to be achieved (Fang and Hu 2022). Although some universities pose official requirements for both teachers and students to possess a certain level of general English within Common European Framework of Reference for Languages, usually B2 or C1, many leave it up to stakeholders whether they consider themselves to speak English well enough to be able to enjoy an EMI course, which may contribute to the idea of English as an inclusive medium of communication (Lasagabaster 2022).

3. Teacher's agency

In many cases, the main driving force behind the introduction of EMI is policymakers, not teachers. In Cho's study (2012), more than half of the instructors said that their only motive for teaching in EMI was the fact that such a policy was introduced by their university. Such evidence does not mean, however, that teachers' and students' attitudes toward EMI are negative. On the contrary, the prevailing belief is that English, used as a lingua franca, may boost career prospects and the quality of education (Dearden and Macaro 2016; Earls 2016; Ellili-Cherif and Alkhateeb 2015).

However, with the EMI phenomenon being spread worldwide, the real use of EMI may differ considerably among particular universities, which in theory follow the same idea. That is all dependent on the context and teachers. In some cases, teachers may be even perceived as a resisting factor while implementing EMI, as the main theoretical assumption is that classes should be held exclusively in English. There are instances of teachers who implement translanguaging in the classroom against the recommendations made by policymakers. According to the case study conducted by Ali and Hamid (2018), which consisted in classroom observation and interviews, teachers were prone to stick to English terminology; however, they switched to their mother tongue for instance when a student was not able to answer a question or when there were implications that students may have not understood the content. Similar observations were made by Romanowski (2020), who

investigated the phenomenon of translanguaging present in the classrooms where the lessons were supposed to be held in EMI. The investigated teachers allowed their students to use their native language, for instance when their classmates did not understand the instructions. Among other comments made by these teachers, one may notice that they were favorably disposed to their students practicing translanguaging, especially when it was necessary for a freer discussion about a certain problem or when the students found it difficult to understand new content in English. It is also worth pointing out that the investigated students appreciated the possibility of using their mother tongue during the lessons and predominantly expressed a very positive attitude towards translanguaging although they were not familiar with the very term itself. On the other hand, according to the study conducted by Doiz and Lagabaster (2017), teachers instructed to use EMI usually preferred the monolingual policy over translanguaging. Therefore, the reception of the imposed policies may be dependent on teachers' personal standpoints.

Although there is a lack of scientific consensus on whether using EMI without any flexibility in language-switching is more beneficial than the incorporation of translanguaging, the tendency is that the theoretical picture drawn by policies is a classroom where English is an exclusive medium of instruction. In reality though, it is sometimes backed with different kinds of translanguaging practices. Despite programs introduced by universities that impose English as the only medium of instruction, practically more than one language is reported to be used in classroom settings in numerous studies (Rose 2021; Doiz and Lagabaster 2021). At some universities though, the authorities give more leeway by letting teachers be flexible as regards the monolingual or polylingual means. One such example is the practices exercised at the University of the Basque Country investigated by Muguruza, Cenoz and Gorter (2020). The University is in an unusual position, as it is located in a region where two languages, Spanish and Basque, both enjoy the official status and long before the introduction of EMI courses, there had been certain flexibility in terms of the language choice in classrooms. The policymakers, by implementing EMI, essentially added English to an already multilingual environment as the third language. Upon the consent of the University's authorities, the delivery of the content is kept within English, while discussions may be held in any of the three languages. With EMI rendering universities more international and instruction more standardized, there is still evidence that it may hamper students' communication and comprehension. For instance, in the study conducted by Cho (2012), only three-fifths of the Korean students declared they fully understood the lectures delivered in EMI. No such problems were reported by the students of the University of the Basque Country, who felt translanguaging helped them follow what was being taught during the lectures, while parts of the lessons held exclusively in English were more tiring. Then again, letting students use their mother tongue for discussions did not encourage them whatsoever to exercise English as a tool of international communication. Although the general idea of the

implementation of EMI is theoretically coherent, there are substantial differences in putting EMI into practice among particular entities that enforce it locally. With translanguaging still poorly researched, it is yet unclear which approach, mono- or polylingual, is more beneficial.

Enforcing the EMI policy on teachers seems apparent also at international levels. An example of this phenomenon could be observed in China, where the Ministry of Education has subsidized universities to promote EMI in the hope of internationalizing Chinese education, with EMI being seen as one of the staples of decent instruction philosophy (Shao and Rose 2022). Subsidies do not translate into training though, which is rarely given to teachers despite the prevailing belief among instructors, which was expressed in an international survey, that teaching style and methods should be adapted to the teaching environment where EMI is incorporated (Macaro, Akincioglu, and Han 2020). The study conducted by Costa and Coleman (2013) via questionnaires sent to various universities in Italy nationwide revealed that nearly four-fifths of instructors who were supposed to teach in EMI had received no training whatsoever beforehand. Fifteen percent were given some kind of linguistic training, while only eight percent of the teachers were provided with methodological training. Other studies seem to confirm the lack of interest in preparing teachers to start teaching in English (O'Dowd 2018; Sanchez-Perez 2020). That raises a question of teachers' readiness to effectively put EMI to use.

Another issue is that different subjects may require a different level of communicative skills, as it is a dubious decision to impose the same linguistic requirements for teaching humanities and exact sciences. As pointed out by Macaro (Sah 2022), there are certain disciplines where English is naturally ingrained, while in other fields English as an educational tool may be a less obvious choice. Yet, there is a dearth of comparative research as regards the use of EMI in different disciplines, as the focus in research has been put on the effectiveness of EMI in exact sciences such as science or maths, while there have been scarce comparisons made between these subjects and, for instance, humanities.

Prescinding from the native-speakerism bias, given no training, teachers often share similar concerns regarding their linguistic competencies in terms of incorporating EMI in classrooms. Even those teachers who find themselves possessing adequate Academic English skills may fear their communicative skills might not be good enough to engage in natural discussions with their students in English. With no objective standards as regards English proficiency, The Common European Framework of Reference for Languages is often followed by authorities. Some universities require teachers to hold B2 certificates, others recommend teachers to reach the C1 level, whereas there are also universities that pose no formal requirements in terms of general English proficiency. The lack of validation and standardization may cause anxiety among teachers regarding their preparedness to use EMI. Moreover, with a thin line between linguistic limits and methodological

limits, students may complain about teaching styles, yet it is not always clear whether the reported shortcomings are the result of a scarce general English vocabulary or the lack of effective teaching techniques. Whether there is a greater need for enhancing pedagogical abilities or linguistic abilities among instructors teaching in EMI remains to be further examined due to the current lack of empirical research (Lasagabaster 2022). The lack of self-confidence as regards their English proficiency does happen to be observed among instructors who are supposed to teach in EMI. As became apparent in the case of a highly experienced and generally respected teacher interviewed by Block (2022), the incentive for teachers to convert their lectures into English was a promise of professional promotion not backed with any support. The main reason for convincing teachers to employ EMI was the need for the internationalization of their university. The result of the interviewed teacher's consent was the feeling of insecurity stemming from the lack of adequate command of English. Not only could it cripple one's confidence in their general academic abilities, which seems to be a broad sociological issue, but it could also cause the feeling of injustice and a lack of agency within the workplace.

Curricula hardly ever include teacher development as part of the EMI introduction process. The need for personnel's growth as regards linguistic and methodological abilities is somewhat transferred from policymakers to teachers themselves, with hope that they will take care of their training on their own. As regards linguistic skills, the development should not be limited to English command only, as certain soft communicative abilities are crucial for preparing students for collaboration within academia, future industry, or community. Even though students are usually well aware that content is the paramount value to be learned, high linguistic abilities may boost teachers' relations with the students through natural communication which allows for more compassion or using a discourse that is more appropriate for the discussed subject. No such support is reported by instructors who often feel neglected by their university bodies as regards broadening competencies necessary for teaching in EMI (Nieto Moreno De Diezmas and Fernandez Barbera 2021).

4. Students' perspective

It would appear obvious that students should be a crucial factor taken into account in the process of the implementation of EMI; however, surprising as it may seem, it is not always the case, with the students' attitudes still needing further research (Li Jiang and Jun Zhang 2019). The importance of considering students' perspectives on learning might be reflected in the idea that self-motivation has a great influence on the end results. With self-motivation divided in the subject literature into internal and external, the external motivation might be triggered by outer incentives like better career prospects or academic recognition, while the internal one may be

constituted by one's own satisfaction and the feeling of growth. Undoubtedly, students' self-motivation might be boosted when education is adjusted to their needs. Consequently, in terms of EMI, such students would possibly be more prone to develop for instance their linguistic abilities on their own account (Tai and Zhao 2022). The study conducted by Sahan and Şahan (2021), which consisted in questionnaires, focus groups, and interviews, found that the main motivations for students to learn through EMI were both external and internal. Out of the external ones, the students mentioned more professional opportunities, a better outside perception of learning in English, or possibilities to be engaged in international academic activities. As regards internal motivations, the desire to improve English skills and being able to follow the newest trends within students' fields of interest were primarily recognized.

As receptive abilities are paramount for the students during a lecture, the level of linguistic skills, with a particular focus on listening abilities in English must be adequate so that content comprehension is not hampered. Yet, the difficulty many teachers face is different linguistic skills among students, with listening skills included. With no objective linguistic standards given, students have no chance beforehand to know whether they would understand the lecture. Not until they actually attend it, do they realize what their comprehension skills truly are. Demanding as it is, a classroom full of students with listening skills at different levels would require effective pedagogical means that teachers do not always possess. Moreover, the need for adjusting the lecture for students with a lower command of English does, at times, seem to be not even recognized by teachers (Siegel 2020). There have been studies that indicate students' linguistic progress made thanks to the very exposure to English at lectures conducted in EMI. Interestingly enough, the development of their English was reported as one of the main advantages of the introduction of EMI in the eyes of the students investigated in China (Huang and Curle 2021). Despite promising notes, linguistic difficulties were still well noticed. Therefore, one of the main threats caused by EMI mentioned by the students, was the concern that it might hamper content comprehension. Regardless of the doubts, another important benefit addressed by the students was a strong belief that education in EMI would greatly improve their career prospects.

However, the perspective on EMI might change over time, and beliefs before attending a course in EMI may well be different from the ones after graduation. Students investigated by Gu and Lee (2018) felt after completing a course that EMI caused them to learn content less thoroughly and learning in their mother tongue would most likely have led to a better understanding of particular subjects. One has to bear in mind though that such testimonies are highly subjective and context-dependent.

Students' past experiences may play a key role in the reception of courses in EMI and thus influence their perception. In the study conducted by Thompson, Takezawa and Rose (2022), one significant factor emerged that turned out to be

decisive as regards the level of content comprehension at lectures held in EMI. Namely, the students who had previously attended lectures abroad or participated in international academic activities experienced far fewer linguistic difficulties in comparison with the students who had neither. It goes without saying that English proficiency is reflected in a better understanding of content delivered in English, and furthermore hands-on experience gained in a foreign environment might be likewise beneficial.

Another aspect that contributes to a better reception of EMI by students might be their prior education, especially in terms of bilingual learning experiences, for instance the fact of being exposed to CLIL. Although there is a significant difference in the level of English used in secondary education compared with higher education, one may suspect that a student who studied through EMI, or at least CLIL, would find the transition to EMI at the level of higher education easier than someone with no such experience. Unfortunately, the question of the transition between secondary and tertiary education is highly underresearched (Macaro et al. 2018). One study conducted by Tai and Zhao (2022) suggested that past EMI experience from secondary education played virtually no role in students' performance at universities that offered programs in EMI. However, further research on the influence of the presence of EMI in secondary education on the reception of EMI among students in higher education is very much welcome. By the same token, research on the impact of the transition from CLIL in secondary education to EMI in tertiary education would likely be a great contribution to the understanding of students' struggles connected with EMI in higher education.

With EMI being undoubtedly a sociolinguistic phenomenon, the linguistic factor does seem to be a focal point of interest, yet the social factor remains underresearched, as pointed out in numerous interviews conducted by Sah (2022). Questions such as how EMI is reflected in social policies or whether students' economical background or linguistic identities may influence their future performance in education held in EMI are still not fully explored. If they are not examined thoroughly, a grave concern arises that in some contexts EMI would possibly be only reserved for students who come from the upper classes or are economically privileged. Having a wider perspective on the social determinants, there should be a way to avoid rendering EMI an elitist phenomenon.

5. Conclusions

Although, because of the subject of this paper itself, the scope of interest was narrowed down to the challenges connected with EMI, one should bear in mind that most of the concerns are contextual and intertwined with the major benefits that EMI holds. Generally, any doubts shared by students or teachers investigated in the presented literature are preceded by enthusiastic attitudes or at least hopeful

notes. As it is a relatively new scientific phenomenon, not every aspect of it has been sufficiently discussed, and thus there is much room for future consensus and standards. With the evidence about EMI being collected in various academic, political and social contexts, the overall picture of particular facets of it may still be blurry at times. However, some questions that have already emerged may be addressed in relation to the entirety of the phenomenon.

The spread of EMI is so extensive and immediate that it is uncertain whether every entity that adopts it, is truly well prepared for it. The unpreparedness may reveal itself in many different forms, such as insufficient staff competence, unthoroughly constructed curricula, or insufficient feedback gathered. With EMI being a trend that gains in popularity, one may not resist the urge to implement it as soon as possible; however, the research done so far has shown that EMI should ideally be adapted in some way to the place where it is introduced. One shall bear in mind that academia is inscribed in a wider social and political context; therefore, particular collective needs should be taken into account if a linguistic transition is enforced. In some countries of a bilingual or plurilingual nature, local languages may be on a brink of extinction, and with EMI being imposed carelessly, the consequences to linguistic landscapes and local identities might be grave. With no universal standards given, particular universities are free to implement EMI as they please, which may be beneficial in terms of addressing local needs. On the other hand, with one of the main goals of the introduction of EMI being the standardization of competencies, the lack of standardization already at the level of the implementation of EMI might hinder reaching this very goal.

Surely, EMI is not free of the bias of native-speakerism, which is hurtful and unjust, especially toward teachers who are non-native users of English. It stems from various reasons, such as the dominance of the western culture or uncertainty about the linguistic abilities of teachers for whom English is not the first language. The latter remains strengthened by the lack of universal and objective measures of the English skills required to teach in EMI. There still is a research gap to fill in as regards what kind of English proficiency one should possess to successfully teach or learn in EMI, including the unclear thin line between general English and academic English. It is instinctual to hire a teacher who is a native speaker of English, as the matter of their general English abilities is no longer a concern; however, studies have shown that successful teaching takes much more than a perfect command of general English. Besides, it is doubtful to perceive English only in terms of an Anglophone model, while in the context of EMI, English is a global tool that is used to standardize qualifications among students who are not native users of English and to improve intercultural and supranational communication. Exclusion and discrimination would be highly counterproductive given the aforementioned goals, yet they are paradoxically still part of the discussion about EMI. Boosting one's self-confidence in using the language even though it is not perfect, might be highly beneficial in improving communication, especially in

the classrooms where EMI is used. Taking a look at this issue from another angle, more professional training and support provided for teachers onsite could well be the answer to the lack of trust toward teachers who are non-native language users or to their lack of self-confidence.

According to most policies regarding EMI, it is assumed that English is the exclusive language of instruction, while practically teachers and students use various forms of translanguaging, which may stem from linguistic difficulties or insufficient terminological background, that is a low level in English for Specific Purposes (ESP) or, in the case of academia, English for Academic Purposes (EAP), not adequate listening or speaking skills, or attempts to encourage a more vivid and natural communication. On the other hand, translanguaging does not fix the problem of not being able to express oneself clearly or study entirely in English, which is supposed to be an international tool of communication. Unfortunately, neither the impact of following strict EMI policies nor the consequences of using translanguaging have been sufficiently addressed, with a dearth of comparative research.

Finally, students need to be heard and taken into account while imposing EMI. Not only should one investigate the struggles reported by them but one should also try and explore the ways students use to deal with those struggles, since this may be truly invaluable information to consider for policymakers. Apart from the linguistic point of view, the social perspective ought not to be overlooked. With the inclusive nature of EMI kept in mind, it is paramount that no students are actually excluded because of their economic or political status. The process of transition between monolingual education at lower levels and EMI in higher education may very well depend on the aforementioned. Therefore, to properly introduce students to their new learning environment, it is beneficial to be aware of any factors that may put students in an unprivileged position even before beginning their higher education. It remains to be further investigated how prior education impacts students' performance in learning in EMI, especially with regards to past EMI experiences and whether they actually boost opportunities in higher education. It may turn out that to get the most out of EMI in higher education, it would be worth promoting EMI at earlier stages. However, at this very moment, there is not enough evidence to have a clear opinion on this.

As far as future research is concerned, it is highly recommendable that a few matters are further explored. Firstly, the unresolved issue of incorporating translanguaging into EMI should be addressed to decide in what ways using more than one language in the classroom is more beneficial than limiting oneself to English only. Thus, having more knowledge on this matter, policymakers could plan curricula more thoroughly beforehand. On the other hand, it may well turn out that EMI at its purest is more advantageous overall. Therefore, more research on this subject is more than welcome. Secondly, establishing objective standards as regards English proficiency would likely standardize education, even the playing field for students, and possibly beat the bias of native-speakerism. Moreover, it would be highly

beneficial to know what kind of language is required to teach and learn particular subjects. Thirdly, with the hope of boosting students' performance in higher education where EMI is incorporated, it is worth investigating the influence of their past educational experiences, with a focus on the transition between EMI used in secondary education and EMI used in tertiary education.

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Food Symbolism and Imagery
in the Polish Translations of William Shakespeare's
The Merry Wives of Windsor

Abstract: The paper presents Polish equivalents of William Shakespeare's food vocabulary based on *The Merry Wives of Windsor*. The analysis entails all Polish versions of the comedy, both its nineteenth-century renditions and contemporary post-war readings. The research aims to demonstrate how the lexical choices of Polish authors affect the interpretation of the play; in particular, it seeks to answer the question of how the imagery and symbolism of Shakespeare's food vocabulary were altered in the process of translation.

Keywords: food, Shakespeare, translation, *The Merry Wives of Windsor*

Food studies is an area of research that has gained wide recognition. Food is an instrument through which writers and playwrights carry specific meanings. It is a marker of people's emotions, habits, fears and prejudices. Food is also strongly intertwined with culture. There is no better way to immerse in another culture than through its cuisine. As Joan Fitzpatrick writes: "Literary critics who write about food understand that the use of food in novels, plays, poems, and other works of literature can help explain the complex relationship between the body, subjectivity, and social structures regulating consumption" (Fitzpatrick 2012, 122).

Shakespeare's plays are replete with the names of food and drinks. The characters of the Bard's plays spend their time feasting, taking delight in various delicacies and conversing about their favourite specialities of English cuisine. The culinary language does not only reflect the eating habits of Shakespeare's times, but also conveys a deeper meaning that has a bearing on interpreting and understanding the literature of the English playwright. Food vocabulary depicts the characters; in particular, it accentuates their weaknesses and vices, as is the case with Falstaff and Slender, the protagonists of the comedy *The Merry Wives of Windsor* and the historical chronicle *Henry IV*. Food is also an instrument of defaming the antagonists

and stereotyping and marginalising the communities perceived as inferior and alien. Last but not least, in Shakespeare's works, food features as an integrating factor that unites the people sharing religion, rites and nationality. The famous sentence uttered by Shylock, the Jewish usurer, one of the main dramatis personae of *The Merchant of Venice*, "I'll not eat with you, drink with you, nor pray with you" (1.3. 34-35), addressed to Bassanio and Antonio after signing the loan contract, is a marker of Jewish and Christian animosity that prevailed in sixteenth-century Venice, the venue of this dark comedy. Many scholarly works have examined various aspects of food in Shakespeare (e.g. Goldstein and Tigner 2016; Fitzpatrick 2010; 2016). The literature devoted to Shakespeare also abounds in cookery books that collect the recipes for the dishes that the playwright alludes to in his plays (Segan 2003). No attention, however, has so far been devoted to commenting upon translating food vocabulary in the Polish versions of Shakespeare's works, which is the concern of this research.

The paper fills the gap in multicultural Shakespeare studies by bringing to light the reception of the food lexicon in Polish versions of Shakespeare's *The Merry Wives of Windsor* (1597-1598). Due to space constraints, the analysis entails selected food references that carry a specific figurative meaning. It aims to establish how Polish translators approached the original food vocabulary and whether they managed to adhere to the hidden symbolism and imagery. In the nineteenth century, *The Merry Wives of Windsor* was translated by such authors as Placyd Jankowski, who wrote under the pseudonym John of Dycalp (1842), Felicjan Faleński (1875), Józef Paszkowski (1877) and Leon Ulrich (1895). After the Second World War, the comedy was rendered by a new group of translators such as Krystyna Berwińska (1954), Maciej Słomczyński (1983) and Stanisław Barańczak (1998). In the course of the study, all the Polish texts have been consulted, which gives an overview of the changing views on translating food in Shakespeare's comedy.[1]

Before proceeding to the analysis of specific lexical items, let us ponder over the problems of translating food in literary texts. As Javier Franco Aixelá rightly states, cultural diversity is one of the biggest complexities of translation studies. The scholar distinguishes two approaches to translating cultural variance: conservation and naturalisation. Conservation is utilised when a translator reproduces the cultural signs into the target text. Naturalisation is defined as a "transformation of the other into a cultural replica" (Aixelá 1996, 54). Another notion that should be taken into consideration is the concept of "translatability". Translatability depends on the symmetry between two cultures and languages. When two cultures are parallel, it is easier to achieve equivalence. In the case of translating Shakespeare's food vocabulary into Polish, it is apparent that not only two diverse cultures are compared, but also different time frames are at stake. As it is demonstrated below, specific symbolism of Shakespeare's food lexicon disappeared in the contemporary language. What is more, many food items mentioned by Shakespeare are alien to the Polish culinary tradition. To alleviate the challenge of translating culture, scholars

propose various techniques. One of the most well-known and often quoted catalogues of translation tools is offered by Peter Newmark. The list of his techniques includes transference, naturalisation, cultural, functional and descriptive equivalent, synonymy, modulation, compensation, paraphrase and glosses (Newmark 1988, 81–93). Javier Franco Aixela lists many strategies that are commonly used when transferring the meaning of culture-specific items from one language into another. Within the conservation approach, he mentions the following techniques: repetition, orthographic adaptation in the form of transcription and transliteration, linguistic translation, and extra or intertextual gloss. The second group of strategies is labelled as a substitution and entails such procedures as synonyms, limited or absolute universalisation, naturalisation, deletion and autonomous creation. The choice of the strategy or strategies depends on many factors, mainly the target audience's expectations (Aixelá 1996, 52–78). It is of interest to examine what approaches and strategies dominate in the Polish versions of *The Merry Wives of Windsor* and how they affect the interpretation of the play by the Polish audience. The following examples illustrate not only various categories of food meaning but also display the Polish translators' methods of handling culture-specific items.

An important function of food in Shakespeare's play is to denote specific personality traits or habits of the main protagonists. One of the characters that is frequently characterised by means of food is Falstaff. In Act 2, Scene 1, Pistol decides to reveal Falstaff's insincere advances toward the two titular wives of Windsor, Margaret and Alice. He approaches Ford, who, initially, does not give credit to such revelations. Ford is convinced that his wife's beauty has faded, and she is no longer capable of triggering another man's attraction. Then Pistol explains that Falstaff prefers women of various ages and social statuses. In Pistol's words: "He loves the gallimaufry" (2.1.107).[2] In contemporary English, *gallimaufry* denotes a medley of different things. It also describes a dish consisting of various ingredients, mostly leftovers, mixed together (Fitzpatrick 2011, 185).

Two Polish translators, Berwińska and Słomczyński, failed to reflect on the double meaning of the English word. Both translators paraphrased the original fragment. Berwińska's Pistol simply says: "On kocha wszystkie" ['He loves all women'] (Szekspir 1954, 53). Słomczyński's equivalent phrase is "gustuje w rozmaitości" ['He likes variety'] (Shakespeare 1983, 49). Ulrich altered the original. His Pistol warns Ford that Falstaff "chce mu podebrać miodu" ['he desires to pick up his honey'] (Shakespeare 1895, 33). Falstaff's fondness for all women is not accentuated in this Polish rewriting, as it is in Shakespeare's text. Rather, Ulrich's comedy reads that Falstaff has the intention to steal something sweet and valuable from Ford. *Miód* (honey), a sweet syrup produced by bees from the nectar of flowers, is associated with something precious (Arct 1916, 769). In the context of the play, *miód* refers to Ford's wife. In the texts authored by Dycalp, Paszkowski and Barańczak, the cultural equivalent of *gallimaufry* is *bigos* (stew). Dycalp's text reads: "Przysmak hultajów bigos" ['*Bigos* is the favourite snack of rogues']

(Szekspir 1842, 59). Paszkowski rendered the original into "Lubi miłosny bigos" ['He likes *miłosny bigos*'] (Shakespeare 1877, 117). Barańczak's version goes as follows: "Hultajski bigos *z* przeróżnych składników to ulubione jego danie" ['His favouirte dish is *hultajski bigos* made from various ingredients'] (Shakespeare 1998, 49). *Bigos* is a traditional Polish dish prepared from cabbage and meat. It consists of a mixture of ingredients such as cabbage and sauerkraut, herbs, mushrooms, spices, prunes, and sometimes wine. Polish *bigos* neatly corresponds to the English gallimaufry. A dish with a blend of ingredients, both sour, sweet and spicy, as well as meat and vegetables, reflects Falstaff's inclination to seduce women of various characters, appearances and classes. Dycalp's rewriting implies that *bigos* is the favourite food of rogues, to which group Falstaff obviously belongs. Paszkowski created a new phrase *miłosny bigos* (love stew) thus stressing Falstaff's love endeavours. Some resemblance to Dycalp's text can be found in Barańczak's version. Barańczak added the adjective *hultajski*, which means 'roguish'. The name *hultajski bigos* (roguish stew) signifies food made of chopped meat and lard (*Słownik języka polskiego* 1964, 518). As Gloger explains, it takes its name from *hultajstwo* (roguery), the lifestyle based on robbery (Gloger 1900, 273). Barańczak's choice is an excellent metaphor for Falstaff. It not only emphasises this character's pursuit of female attention but also his roguish habits and propensity to crime.

In Shakespeare's play, food is a marker of insults. Food is used by the main characters to offend others. In Act 1, Scene 1, John Falstaff and his companions, Bardolph, Pistol and Nim, argue with Robert Shallow, Justice of the Peace and his cousin, Abraham Slender. The subject of the dispute are the accusations levied against Falstaff and his band. Shallow informs Falstaff that he will bring legal action against him in *The Star Chamber* by charging him with battery and illegal hunting. Slender also lodges complaints against Falstaff and his men, accusing them of stealing money. Hearing this, Bardolph calls Slender *Banbury cheese*: "You Banbury cheese!" (1.1. 117). Pistol reacts to the insult by calling Bardolph: "How now, Mephostophilus?" (1.1.119). *Banbury cheese* is a name for the cheese made from cow's milk in Banbury, Oxfordshire. Its characteristic feature is its oval shape and dark colour. *Banbury cheese* excellently matches Slender, a small, thin, and weak man. Scholars also propose another interpretation of *Banbury cheese*. In the Renaissance, Banbury was a hub of the Puritan community, and relatedly the phrase *Banbury man* denoted a Puritan. Reading Shakespeare's comedy in this light, Bardolph is calling Slender a Puritan (Fitzpatrick 2011, 26-27; Brewer 2014, 62; Vienne-Guerrin 2016, 26).

Most Polish translators rendered *Banbury cheese* directly into *banburski ser* (Banbury cheese). Ulrich's texts reads: "A ty banburski serze!" ['You Banbury cheese!'] (Shakespeare 1895, 16). Barańczak added the adjective *chudy* (thin), which emphasises Slender's small figure: "Ty chudy banburski serze!" ['You thin Banbury cheese!'] (Shakespeare 1998, 15). Słomczyński had a different idea about

translating the original. His proposal reads: "Ty dziurawy serze z Banbury!" ['You Banbury cheese with holes!'] (Shakespeare 1983, 15). Słomczyński amplified the English phrase by adding the word *dziurawy* (full of holes), thus suggesting that *Banbury cheese* has holes. The word *dziurawy* (scruffy) also means 'messy', 'sloppy' and 'untidy'. In this sense, Słomczyński's Bardolph insinuates that Slender has many deficiencies. Although faithful to Shakespeare's play, the phrase *ban-burski ser* is devoid of the cultural associations that the original carries. To fully comprehend Bardolph's slander, the Polish audience has to first decipher the cultural allusions hidden in the Bard's comedy. Paszkowski resigned from a literal equivalent. He replaced the original with the phrase "Ty chudy owczy serze!" ['You thin goat cheese!'] (Shakespeare 1877, 106). The adjective *chudy* (thin) corresponds to the appearance of Slender. The other part of the phrase created by Paszkowski, *owczy serze*, denotes goat's cheese, which does not tally with the original meaning. Berwińska's text stands out when compared to other Polish renditions. Her Bardolph offends Slender by the following invective: "Ty portu-galski śledziu" ['You Portuguese herring'] (Szekspir 1954, 20). The Polish female translator purged the text from the associations with *Banbury cheese*. In Polish, *śledź* (herring) denotes various things. In the first place, *śledź* is the name for a fish commonly eaten by Poles, especially in the past and during Berwińska's times. In the inter-war period, *śledź* was a popular appetiser consumed with vodka before the main dish. *Śledź* (commoner), however, was also an offensive word used to address a person of low status, inferior position and class. The meaning of this word is reflected in the phrase "z drogi śledzie" ordering commoners to step aside to give way to a prominent person to pass. The M. Arct dictionary of 1916 notes another meaning of *śledź*, which overlaps with the portrayal of Slender by Shake-speare. According to this source, *śledź* implies a thin, impoverished and pale person, which is the exact depiction of Slender (Arct 1916, 8). Berwińska resigned from the phrase *banburski ser* preferred by her male predecessors and domesticated the original text so that it sounded less obscure to the Polish audiences. Her substitute characterises Slender as a slim man of inferior rank. It cannot be forgotten that she translated the text in 1954. For contemporary recipients, the analogy between *śledź* and slenderness may not be clear. If one is to accept the hypothesis of the affiliation between Slender and puritanism, Berwińska's choice is not entirely apt. In Poland, herring was associated with Catholicism, the origin being the custom of eating fish by Catholics on Friday. In the Warsaw dialect, for example, *śledź* was a nickname for a Catholic person (Wieczorkiewicz 1968, 98). It is worth com-menting on the adjective *portugalski* (Portuguese), which comes before the word *śledź*. It might allude to the Jewish community of Portuguese origin that lived in England in the sixteenth century. Some of the Jews of Portuguese descent even served at the court of the Queen, the most famous example being Roderigo Lopez (1525–1594), a physician of the monarch executed for treason in 1594 (Seton-Rogers 2018, 6–12). Berwińska was probably inspired by Slender's first name,

which is Abraham. Before proceeding to another translator, it is worth indicating that in the Renaissance, herring had a sexual meaning (Fitzpatrick 2011, 213; Limon 2018, 247).

Dycalp, for example, translated Shakespeare's passage differently: "Co? pieczone jaje!" ['What? baked eggs!'] (Szekspir 1842, 16). To understand the meaning of Dycalp's translation, we have to refer to the old definition of the word *jaje* (eggs). Apart from its basic meaning of eggs, this noun also denotes something of low value (*Słownik języka polskiego* 1859, 227-228). Pistol compares Slender to Mephistofel, which in Polish finds the following equivalents: *Mefistofilu (*Shakespeare 1983, 15), *Mefistofelesie* (Szekspir 1954, 20), *Mefistofelu* (Szekspir 1842, 17), *Mefostofilu* (Shakespeare 1895, 16; Shakespeare 1877, 106). Only Barańczak's version deviates from the other texts: "Jak śmiesz, diaboliczny nabiale?" ['How dare you, you devilish dairy product'] (Shakespeare 1998, 16). Here, the translator adheres to the theme of food and retains Slender's link with cheese.

Nim joins the wrangle by retorting: "Slice, I say. *Pauca*, *pauca*. Slice, that's my humour" (1.1.121). It is not hard to see the analogy between Nim's words and *Banbury cheese*. Nim wants to mutilate Slender. The sense of the original was altered in the eldest Polish texts. Paszkowski rendered the English text thus: "Cicho, mówię! *Pałka wełba*! To sens moralny mojego humoru" ['Silence! *Pałka wełba*! That's the sense of my humour'] (Shakespeare 1877, 106). The phrase *pałka wełba* (blow to the head) has no associations with cutting cheese. It denotes giving a blow to Slender's head. There is no allusion to Banbury cheese in Ulrich's text either: "Porąbać go! pauca, pauca! porąbać, to moja reguła" ['Chop him! pauca, pauca!, this is my rule'] (Shakespeare 1895, 16). This translator used the word *porąbać*, which means 'to chop'. Dycalp purified Shakespeare's comedy from the food symbolism. He modified the play by placing it in a different cultural setting. His version reads: "Fryc! – powiedziałem pauca, pauca! To mój szał moja słabość!" ['Fryc!- pauca, pauca, I said! That is my frenzy, my weakness!'] (Szekspir 1842, 17). *Fryc* is an offensive word for a German person. In the second sense, it means a layman (Arct 1916, 345). A characteristic feature of Dycalp's text is making references to the German language and culture, which, as Alicja Kosim has already remarked, echoes the nineteenth-century antagonisms between Poles and Germans (Kosim 2018, 141–154). The post-war translations also show many deviations from the original. Słomczyński chose the equivalent *rozpłatać* (to cut): "Rozpłatać go, powiadam! *Pauca*, *pauca*, rozpłatać; taki mam humor!" ['Cut him, I say! *Pauca*, *pauca*, cut him; that is my humour!'] (Shakespeare 1983, 15). *Rozpłatać* means 'to cut into smaller parts'. The verb is not usually used in reference to cheese. Berwińska continues the associations with herring: "Opraw go, powiadam! pauca, pauca! Opraw go! Mam apetyt na śledzia" ['Trim him, I say! pauca, pauca! I feel like having some herring'] (Szekspir 1954, 20). Only Barańczak preserved the analogy between *slice* and *Banbury cheese* by using the expression *pokroić w plasterki* (to cut into pieces): "Pokroić go w plasterki, powiadam! Tnij bez

gadania – taki mój temperament"['Cut him into pieces, I say! Cut him – that is my humour'] (Shakespeare 1998, 16).

Before proceeding to another instance of food vocabulary in Shakespeare's comedy and its Polish renderings, it is necessary to comment on the word *humour* that comes from Nim's mouth. The noun refers to the theory of there being four humours, which dominated sixteenth-century medicine. Humoralism, as it is sometimes called, proclaimed that the bodily fluids, specifically blood, phlegm, black and yellow bile, triggered the development of a specific humour in a person. The prevalence of a particular fluid determined the person's temperament. Depending on the level of the fluid, people were described as choleric, sanguine, melancholic or phlegmatic. What is relevant for the present study is that these humours were conditioned by the person's diet. It was believed that certain foods and drinks could boost one of the temperaments. For instance, a patient afflicted with choleric moods was advised to abstain from hot and spicy foods, which, it was believed, increased the symptoms of his or her condition (Jouanna 2012, 335–360).

It is very difficult to preserve the allusions to the medical knowledge of Shakespeare's epoch in translation. An overview of all the Polish texts shows that only Barańczak managed to reproduce the original meaning. The other translators departed from Shakespeare's message. The literal equivalent of *humour* in the Polish language is the similarly sounding *humor*, which explains why some translators chose this substitute. *Humor* features in Paszkowski's and Słomczyński's versions. *Humor* conceptualises something amusing. It also stands for a temporary mood. Ulrich's phrase "taka moja reguła" ['such is my method/way of acting'] implies that recurse to violence is Nim's tactic to deter the opponent. The allusion to the theory of four humours, however, is absent in Berwińska's rendering. Barańczak's *temperament*, which denotes a person's emotional character that takes outer manifestations, is most fitting in this context.

In Act 2, Scene 2, Ford visits Falstaff in the disguise of Brook. Concealing his identity, Ford encourages Falstaff to seduce Alice. During the conversation, the name of Ford is mentioned. Falstaff screams: "Hang him, mechanical salt-butter rogue!" (2.2. 263). Here, again we can see the food-related invective. *Salt-butter* was a type of butter of inferior value imported from Flanders. As compared with domestic butter, salt-butter was of poorer taste and quality. It was also cheaper than the English product (Fitzpatrick 2011, 63–65). By calling Ford *salt-butter*, Falstaff asserts that his interlocutor is a man of lower rank. Is this portrayal reconstructed in the Polish texts? Butter is only mentioned by Ulrich, Słomczyński and Barańczak. In the translations by Ulrich and Barańczak, Ford is depicted as salt butter, which resembles the original: "Na szubienicę z tym urwiszem, z tą osełką solonego masła!" ['Send this rogue to the gallows, this salt butter'] (Shakespeare 1895, 44) / "A niech go powieszą, tego prostaka, tą osełkę solonego masła!"['Hang him, this simple man, salt butter'] (Shakespeare 1998, 69). In Ulrich's text, we can find an archaic word, *urwisz*, the equivalent of which in English is *rogue*. Słomczyński altered the

original. In his version, Ford is presented as a man who has a habit of eating salt-butter: "Niech go powieszą, prostackiego, żrącego solone masło chłystka!" ['Hang him, a simple rogue eating salt butter'] (Shakespeare 1983, 69). Dycalp replaced the original with the equivalent *szperka mieszczańska* (bourgeois pork lard): "A niech go tam spotka szubienica, tę szperkę mieszczańską!" ['Hang him, this *szperka mieszczańska*!'] (Szekspir 1842, 85). *Szperka* is an archaic word that denotes fried pork lard. Apart from its culinary sense, *szperka* also depicts a miser (*Słownik języka polskiego* 1859, 607; Arct 1916, 879). Based on this definition, we can conclude that Dycalp's Ford characterises Falstaff as a man who is mean with his money rather than of lower social standing. The adjective *mieszczańska* (bourgeois) denotes one of the social classes in Poland. By choosing the word *mieszczańska,* Dycalp probably wished to underline Ford's affiliation with Windsor's inhabitants. Paszkowski deleted the associations of Ford with butter and proposed a different interpretation of this passage: "Kat mi tam po tym biednym, rogatym dudku!" ['Hang this poor hoopoe!'] (Shakespeare 1877, 122). *Rogaty* (horned) describes a man whose wife has committed adultery. In colloquial language, *dudek* (hoopoe) is a fool, a person who is easily deceived by others (Arct 1916, 238). In other words, Paszkowski's Falstaff calls Ford a silly man who does not notice that his wife, Alice, has a secret liaison with another man. Falstaff in Berwińska's version screams: "Na szubienicę z nim! Biedne, rogate bydlę!"['Hang him! Poor horned beast!'] (Szekspir 1954, 73). *Bydlę* (beast) does not only denote a male bovine but is also an offensive label for a person who is immoral, cruel and good for nothing that deserves contempt and condemnation. Its related word *bydlęcić się* (to degenerate) stands for moral degeneration (*Słownik języka polskiego* 1964, 758-759). Berwińska chose the most ominous term to depict Ford. Her translation of the passage specifies that, in the eyes of Falstaff, Ford is a rascal.

Interestingly, many food items are loaded with sexual undertones. In the Renaissance, food was a designator of various social classes and professions. One such example is *stewed prunes*. Apart from its culinary meaning, this fruit designated prostitutes and brothels, in which sex services were offered for money (Crystal and Crystal 2002, 421; Limon 2018, 308). The association of sweet prunes with illicit sex came from the conviction that this snack was a panacea for venereal diseases. Thought of as an effective antidote for sexually transmitted infections, stewed prunes were served in English bawdy houses (Fitzpatrick 2011, 344-345; 2016, 30; Williams 1997, 248-249). A reflection of the sexual meaning of this food can be found in *The Merry Wives of Windsor*. In Act 1, Scene 1, we witness the conversation between Anne Page and Slender. Anne invites Slender to the house of her father for dinner. The man refuses, explaining that the smell of meat brings back unpleasant memories. Slender tells her how once he became embroiled in a duel, the reason being stewed prunes. Reading between the lines, we surmise that the real cause of the conflict between the contestants was a lady who worked in a house of ill repute. It is very hard to transpose this lewd allusion into another

language. To understand the meaning hidden behind *stewed prunes*, the audience has to be familiar with the social context of sixteenth-century England.

Most Polish translators rendered *stewed prunes* literally. In the oldest texts by Dycalp and Ulrich, the equivalent of *stewed prunes* is "półmisek gotowanych śliwek" ['a plate of cooked prunes'] (Szekspir 1842, 28; Shakespeare 1895, 20). In Paszkowski's rendition, Slender talks about "porcyi duszonych śliwek" ['portion of stewed prunes'] (Shakespeare 1877, 110). Słomczyński rendered the original in a similar manner to his predecessors as "półmisek smażonych śliwek" ['a plate of stewed prunes'] (Shakespeare 1983, 23). Stewing is a process of long, slow cooking. Its Polish equivalent is *dusić*, as was indicated by Paszkowski. Other translators substituted the English verb with such words as *gotowany* (cooked) and *smażony* (fried). Barańczak coined the phrase "misce kompotu z suszonych śliwek" ['a plate of boiled prunes'] (Shakespeare 1998, 24). He chose the name *kompot* (fruit compote), a popular Polish drink made of seasonal fruit. Berwińska as the only translator attempted to convey the sexual undertones of the food that the original contains. Her text informs us that Slender fought with another man about "jedną … kurczę pieczone" ['one… baked chicken'] (Szekspir 1954, 28). The feminine form *jedną* implies that the argument concerned a woman.

Another sexually-charged scene can be found in Act 4 of the play. In Scene 1, Mistress Quickly observes the Latin lesson taught by Sir Hugh Evans (4.1). The teacher examines his pupil, the Pages' son, William, on his knowledge of Latin grammar. The Latin words discussed by the schoolmaster connote sexual intercourse and male body parts. One of them is *caret*, which Mistress Quickly takes for *carrot*. Due to its phallic shape, a carrot was associated with a penis (Williams 1997, 65; Kiernan 2006, 51; Limon 2018, 170). Evans speaks first: "Remember, William. Focative is caret". Mistress Quickly responds: "And that's a good root" (4.1. 48-49). It is worth adding that *root*, similarly to *carrot*, stood for the male organ (Williams 1997, 262; Limon 2018, 310). All Polish translators erased the sexual subtext of this "wonderfully obscene mock-lesson in Latin grammar", as Kiernan has called it (2006, 49). In the Polish versions, the sexual meaning of the vegetable is not pronounced. Barańczak and Słomczyński omitted the reference to carrot in their texts. The other Polish translators used the pair *caret-kareta* (carriage), which completely changes the original meaning. *Kareta* (carriage) is the name of an old four-wheeled, horse-drawn vehicle that was the primary means of transport among the Polish aristocracy. It does not connote any sexual allusions as can be decoded in the original.

One of the functions that food plays in Shakespeare's literary masterpieces, *The Merry Wives of Windsor* included, is to denote mockery. The characters of Shakespeare's plays very often use food to express the prevailing superstitions and clichés concerning specific nations. In Act 2, Scene 2 of the play, Ford makes a bold statement that expresses female unfaithfulness: "I will rather trust a Fleming with

my butter, Parson Hugh the Welshman with my cheese, an Irishman with my aqua-vitae bottle, or a thief to walk my ambling gelding, than my wife with herself" (2.2. 284-289). The passage specifies the patriarchal family pattern of the Elizabethan society. As Rosemary Kegl has observed, the scene in question indicates Ford's fear that "Alice Ford's adultery would threaten his control over her sexuality, over his wealth, and most unendurably, over his good name" (Kegl 1994, 253). Alongside the infamous opinion about women, specifically Ford's wife, the quotation mirrors the stereotypical attitudes towards the Flemish, Welsh and Irish that plagued English society. In the Elizabethan epoch, the Flemish were considered butter-lovers. The connection between the Flemish and butter did not only originate from their supposed indulgence in butter but also from their recognised position as producers and importers of dairy products. The association of the Welsh with cheese stemmed from their image as a barbaric and poor minority leading simple pastoral lifestyles. It was generally considered that the Welshman's staple diet was made up of dairy products, hence so many allusions to cheese in Shakespeare's work (Fitzpatrick 2014, 85-86; Snyder 1920, 161-162, 163). It must be noted that Shakespeare's play contains many scenes illustrating the supposed addiction of the Welsh to cheese. Two examples will suffice. Sir Hugh Evans hurries to supper at Mr. Page's house which consists of "pippins and cheese" (1.2). Falstaff worries that the Welsh pastor will change him into cheese in another part of the comedy (5.5). The Irish are depicted by Shakespeare as people drinking *aqua vitae*, which implies alleged drunkenness.

A survey of all available Polish translations indicates no problems with rendering *butter* and *cheese* into the target language. The Polish texts feature direct equivalents of the English words, which are *masło* (butter) and *ser* (cheese) respectively. However, there appear different substitutes for *aqua vitae*. In Shakespeare's times, *aqua vitae*, known also as the water of life due to its medicinal properties, was strong alcohol made by distilling wine or ale (Fitzpatrick 2010, 20–21; Rasmussen 2014, 91). In the oldest Polish texts by Dycalp and Ulrich, this beverage was rendered into *wódka* (vodka) (Szekspir 1842, 87; Shakespeare 1895, 45). Paszkowski substituted the name of the English alcoholic drink with the phrase *skład wódczany* (alcoholic beverages) (Shakespeare 1877, 123), which denotes a collection of alcoholic beverages. This choice does not overlap with the English *aqua vitae*. Paszkowski replaced the concrete name of alcohol with a term that denotes alcoholic drinks in general. Słomczyński, Berwińska and Barańczak, contrary to their nineteenth-century predecessors, used the Polish word *okowita* (Shakespeare 1983, 70; Szekspir 1954, 74; Shakespeare 1998, 70). The name *okowita* (*akwawita*) derives from the Latin *aqua-vitae*. It refers to an old Polish homemade alcohol produced from potatoes and barley (*Słownik języka polskiego* 1859, 536; Pacuła 2017, 126-127). Of all the Polish proposals, *okowita* is the most convincing word. It relates to the English *aqua vitae* etymologically and semantically. It also accentuates Ford's liking for strong alcohol.

Of all the play's characters that are subject to constant mockery and defamation,

Falstaff deserves special attention. The culinary language that Shakespeare adopted to portray Falstaff marks out this protagonist's overweight. As Henry Buchwald and Mary E. Knatterud have convincingly demonstrated, Falstaff suffers from morbid obesity, the illness that manifests itself in such symptoms as, among other things, shortness of breath, flatulence, excessive perspiration, fatigue, and depression (Buchwald and Knatterud 2000, 402–408). As a way of illustrating Falstaff's heavy weight, we can quote the passage in which Mistress Page, as a reaction to the love letter sent to her by Falstaff, states: "His guts are made of puddings" (2.1.29). *Pudding* has a variety of meanings in English. It usually stands for a type of desert, but it also refers to animal entrails mixed with various ingredients, as in black pudding (Fitzpatrick 2011, 345-346; Vienne-Guerrin 2016, 333). Ben and David Crystal's dictionary defines *pudding* as 'dumpling', 'pastry' or 'stuffing' (Crystal and Crystal 2002, 352). Another meaning of this dish listed in the dictionaries is 'human entrails' or 'big, fat person' (Fitzpatrick 2011, 345). It is also important to add that, in colloquial language, pudding designates sexual arousal and intercourse or its result, as some being in the pudding club – or pregnant (Vienne-Guerrin 2016: 334). The manifold meaning of *pudding* disappears in all Polish versions. The nineteenth-century Polish texts feature a literal equivalent of the English word, which is *pudyng*. Ulrich reduced the original into "brzuch jego ulepiony z pudyngu" ['his belly is made from *pudyng*'] (Shakespeare 1895, 30). Similarly, Dycalp rendered pudding into *puddyng*: "ta ładowna waliza stworzoną jest tylko do puddyngów!" ['this big belly is made only for *puddyng*!'] (Szekspir 1842, 53). *Waliza* (large suitcase) is a colloquial name for a big belly (*Słownik języka polskiego* 1861, 1806). Paszkowski departed from the sense of the English text. His Mistress Page speaks about Falstaff's heart, not his guts: "jego serce jest z puddyngu" ['his heart is made from pudding'] (Shakespeare 1877, 115). The contemporary Polish translators made an effort to find the equivalents that would correspond to the English cuisine. Słomczyński and Barańczak employed the word *flaki*. Barańczak rendered the original into: "bandzioch ma wypchany flakami" ['his bandzioch is filled with guts'] (Shakespeare 1998, 46). *Bandzioch* is a synonym for a big belly, which neatly depicts Falstaff's corpulence. Słomczyński's translation reads: "kiszki ma wypchane flakami" ['entrails is filled with guts'] (Shakespeare 1983, 45). Berwińska paraphrased the original into "on ma w brzuchu otchłań zamiast żołądka" ['he has space in his belly instead of a stomach'], emphasising Falstaff's appetite (Szekspir 1954, 49).

Falstaff's links with food are also portrayed in the final part of the play. Ford, Mistress Page and Page offend Falstaff using food imagery. Ford harangues Falstaff as follows: "What, a hodge-pudding? A bag of flax?" (5.5. 151). *Hodge-pudding* refers to stuffing made of various ingredients such as meat and vegetables (Fitzpatrick 2011, 215; Crystal and Crystal 2002, 223). The look of *hodge-pudding* embodies Falstaff's appearance. The Polish texts contain various equivalents. Dycalp's substitute for *hodge-pudding* is *puddyng*: "W taką górę puddyngu!" ['Into such a mass of

pudding!'] (Szekspir 1842, 200). Paszkowski chose the word *plumppuddyng*, a dish made from suet, flour and cream with dried fruits and spices, served traditionally at Christmas: "Taki plumppuddyng? taki wór konopiany" ['Such *plumppuddyng*? Such hempen sack'] (Shakespeare 1877, 152). Ulrich domesticated the text by choosing a dish from the Polish cuisine: "Co, do takiej lemieszki, takiego woru wełny?" ['Into such *lemieszka*, such a sack of wool?'] (Shakespeare 1895, 92). *Lemieszka*, known also as *prażucha*, *fusia,* is an old Polish dish prepared from boiled potatoes, flour and water, served with pork rinds (*Słownik języka polskiego* 1859, 618; Arct 1916, 659). Barańczak chose the words *baleron* (pork) and *wór konopi* (hempen sack): "Do takiego tłustego baleronu? Takiego wora konopi?" ['Into such fat pork? Such hempen sack?'] (Shakespeare 1998, 170). Although *baleron* has nothing in common with the English pudding, it exposes Falstaff's obesity. It is also an offensive word used to depict someone who is fat and ugly. Słomczyński rendered the original into: "Co? Tę kupę flaków? Ten wór konopi?" ['What? These entrails? This hempen sack?'] (Shakespeare 1983, 167). Berwińska's text reads: "Co, tę galaretę? Ten worek siana?" ['What? This jelly? This sack of hay?'] (Szekspir 1954, 166). In the first sense of the word, *galareta* (pork aspic) is a Polish dish prepared from different parts of the pig. To add colour and extra flavour to this food, cooked vegetables, such as carrots or beans, are added. *Galareta* also conceptualises cowardice and extreme fear that manifests itself in body shaking (*Słownik języka polskiego* 1964, 1021). Berwińska's choice amplifies the meaning of the original. This equivalent directs our attention to Falstaff's pusillanimity. Her choice of equivalent tallies with the portrayal of Falstaff in the comedy. Throughout the whole play, he proves to be a coward who regularly escapes any danger or confrontation.

  Mistress Page adds: "A puffed man?" (5.5. 152). Barańczak chose the phrase *rozdęta dynia*: "Takiej rozdętej dyni?" ['Such a puffed pumpkin?'] (Shakespeare 1998, 170). *Dynia* (pumpkin) is commonly associated with a big belly and gluttony (*Słownik języka polskiego* 1964, 502-503). Barańczak's choice perfectly matches the outward appearance of Falstaff. Both Słomczyński and Ulrich used synonymic words *wzdęty* and *wydęty* (flatulent). "Tego wzdętego człowieka?" (Shakespeare 1983, 167) / "Wydętego człowieka?" (Shakespeare 1895, 92). *Wzdęty/wydęty* describes a medical condition of accumulating too much gas in the stomach and bowels, attributed to gluttony and abusing alcohol. One of the visible signs of flatulence in a person affected by this common ailment is a swollen belly. Słomczyński's and Ulrich's choices aptly characterise Falstaff. Both Polish texts stress Falstaff's insatiable appetite for food and indulgence in alcohol. Paszkowski and Berwińska selected the noun *purchawka*. In Paszkowski's version, Mistress Page asks: "Takie purchatkowate stworzenie?" ['Such a puff-shaped creature?'] (Shakespeare 1877, 152). Berwińska's equivalent resembles that of Ulrich's: "Tę purchawkę?" ['This puffball?'] (Szekspir 1954: 166). *Purchawka* (puffball) is a whitish mushroom of circular shape and swollen texture. In shape, the mushroom resembles Falstaff's figure. In the second sense of the word, which also applies to Falstaff, *purchawka*

depicts a person who is old, mean and grumpy (Arct 1916, 477). Linde's dictionary adds a medical sense of *purchawka*, which is 'ulcer' (*Słownik języka polskiego* 1859, 723). To put it simply, Falstaff is like a *purchawka* both by his external look and his personality. A yet different equivalent was proposed by Dycalp. This translator associated *puffed man* with *pierzyna*: "W taką pierzynę!" ['Into suchan eiderdown?'] (Szekspir 1842, 200). *Pierzyna*, an eiderdown in English, has a dense, feathery and puffy structure, which relates to Falstaff's belly. M. Arct's dictionary specifies that in the colloquial sense *pierzyna* is a token of laziness, heavy weight and lack of stamina. *Pierzyna* has also sexual undertones. Thus Dycalp directs his viewers' attention to Falstaff's fatness as well as his stealthy plans to seduce Margaret and Alice and deprive them of money.

As stated in the opening paragraph, food permeates Shakespeare's plays. The audience of his works can find multiple references to the names of food and drink. Food vocabulary is the catalyst of a specific meaning which has to be decoded in the process of translation. The above survey of selected excerpts of the Polish renditions of *The Merry Wives of Windsor* shows that the translators employed various strategies to unveil the English culinary world to the Polish audience. The asymmetry between English and Polish cultures prompted the Polish translators to follow naturalisation. The prevailing techniques that the translators used were paraphrases, cultural, functional and descriptive equivalents. No usage of repetitions, deletions, glosses or footnotes can be noticed. Shakespeare's plays are intended for the stage rather than reading. The performativity of the play is a crucial factor that has to be taken into consideration when rendering the original meaning into the target language. Providing explanations in the form of endnotes or glossaries does not fit the purpose of the Bard's plays. Interestingly, various choices affect the portrayal of the main characters, the most illustrative example being Falstaff. The Polish translators painted different portraits of Falstaff. Some emphasised this character's fatness. Others highlighted other traits of the man, such as his avarice and lust. Shakespeare's food vocabulary is rich in double entendres. Many of the names of the food products evoke an additional sexual meaning such as *stewed prunes* and *puddyng*. Unfortunately, the sexual associations disappear in the Polish texts. Based on the research conducted in this paper, we can draw some general conclusions regarding translating food vocabulary in literary texts. As stated previously, rendering culture-specific items is one of the most challenging aspects of translation. It requires not only the knowledge of the social and cultural setting of the source text but also the application of specific strategies. When two different cultures do not overlap, as is the case with English and Polish cultures, the translator has to search for functional equivalents that will be as close as possible to the original meaning. The difficulty of translating Shakespeare's food lexicon is surmounted by the shift in the time period. The cultural realia of the sixteenth century that food carries are obscure to the contemporary audience. Some losses of meaning seem to be inevitable. In Maria Dembińska's book about food and drink in medieval

Poland, we read the following: "Food, like language, is a transmitter of culture, a set of signals that define a people in terms of time and place" (Dembińska 1999, 1). It is no wonder, then, that transmitting the cultural code into another language in the process of translation has proved so hard.

Notes

1   *The Merry Wives of Windsor* was also translated in parts by Felicjan Faleński in *Tygodnik Mód i Powieści*. F. Faleński, "Wesołe Mieszczki z Windsoru", *Tygodnik Mód i Powieści*, 1875, Vol. 16, 181–183.
2   All quotations from *The Merry Wives of Windsor* are based on W. Shakespeare, *The Merry Wives of Windsor*, ed. T.W. Craik, Oxford 2008.

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