

CHALLENGES OF ACHIEVING FUNCTIONAL EQUIVALENCE IN RENDERING HISTORICAL TERMINOLOGY INTO ENGLISH

Panjiyeva Ro'zixol Beknazar qizi

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Annotation. This thesis examines difficulties in achieving functional equivalence when translating historical terminology into English. It analyses semantic shifts, culture-specific references, and institutional naming conventions across periods. The study applies comparative contextual analysis, componential semantics, and pragmatic evaluation to identify recurrent distortion patterns. Scientific novelty lies in a multi-parameter decision model linking term provenance, genre function, and reader competence to translation strategies ensuring communicative adequacy.

Аннотация. В тезисе рассматриваются трудности достижения функциональной эквивалентности при переводе исторической терминологии на английский язык. Анализируются семантические сдвиги, культурно-специфические реалии и институциональные наименования разных эпох. Используются сопоставительный контекстуальный анализ, компонентный анализ и прагматическая оценка. Научная новизна заключается в модели выбора стратегии, учитывающей происхождение термина, жанровую функцию и компетенцию адресата.

Keywords: functional equivalence; historical terminology; culture-specific items; semantic drift; pragmatics; translation strategy; discourse

Ключевые слова: функциональная эквивалентность; историческая терминология; реалия; семантический сдвиг; прагматика; переводческая стратегия; дискурс

The present thesis addresses functional equivalence as a translation objective in which the target-language unit is expected to perform a comparable communicative task to the source-language unit within a given historical discourse. In historical texts, terminology is not merely nominative but also indexical: it points to institutions, social hierarchies, legal norms, and material culture that may not exist in the anglophone experience, so the translator's choice shapes how the past is cognitively reconstructed. The mechanism of difficulty arises because many historical terms combine denotation, connotation, and period-specific evaluative colouring, while English often offers either a broad generic term or an anachronistic modern equivalent that misdirects interpretation. For example, translating a medieval administrative title with the modern "minister" can inadvertently import parliamentary accountability and contemporary bureaucratic semantics, even if the source title implied patrimonial authority and personal dependence. Empirically, corpus-based translation studies repeatedly show that culture-bound historical items are among the highest-risk categories for meaning loss; in professional practice, such items account for a disproportionate share of translator's notes and editorial interventions, and in some studies of humanities translation error typologies they form roughly one quarter of critical mistranslations. Scientifically, this supports the view that functional equivalence in historical terminology is best treated as a constrained optimisation problem where informational fidelity, pragmatic effect, and temporal authenticity must be balanced rather than maximised simultaneously.

Functional equivalence must be distinguished from formal equivalence because historical terminology often encodes a conceptual system rather than a stable lexical match. The mechanism that undermines formal matching is semantic drift: a term that seems cognate across languages may have shifted in scope or evaluative tone, creating “false friends” across time as well as across languages. A frequently cited example is the family of terms relating to estates and ranks, where English “noble,” “lord,” or “gentry” can map only partially to non-English stratifications, and the translator may over-unify a differentiated source hierarchy. In quantitative terms, terminological databases in historical lexicography indicate that polysemy rates for institutional nouns increase markedly in pre-modern sources, with some key governance terms exhibiting three to six salient contextual senses in a single century’s documentation. Scientifically, cognitive semantics explains this as radial category structure: the core sense is extended by metaphor and metonymy, and a translator who selects one English label collapses the radial network, thereby altering how readers infer power relations and social obligations.

A central challenge is that historical terminology is frequently embedded in genre conventions that determine how terms are meant to function pragmatically. The definition of genre-conditioned function is the role a term plays in a chronicle, charter, memoir, or historiographic synthesis, including whether it signals legal precision, narrative colour, or ideological stance. The mechanism of mismatch appears when the translator treats all occurrences as referentially identical, ignoring that the same term may function as a legal category in one context and as a rhetorical epithet in another. For example, an institutional label in a charter may require an English rendering that foregrounds legal specificity, while in a memoir the same label may need a rendering that preserves evaluative nuance and social distance. Scientifically, relevance theory accounts for this by noting that readers allocate processing effort based on expected cognitive effects, and translation choices should manage that effort by signalling whether a term is to be read as a technical category or as narrative shading.

A further challenge is terminological density, where historical passages compress multiple layers of information into short formulaic strings. The definition of terminological density is the ratio of specialised units to overall tokens, often elevated in legal and administrative sources. The mechanism of loss arises when English requires more explicit syntactic structure to be intelligible, forcing expansion that can disrupt the rhythm and authority of formulae, or, alternatively, when the translator compresses information and omits legally relevant distinctions. In documentary translation practice, terminological density correlates with higher revision rates: editors report that such passages attract more queries and require more consistent term management, with measurable increases in time-on-task compared to narrative segments. Scientifically, this aligns with information theory: higher density increases potential ambiguity under compression, so translation must either preserve redundancy via careful expansion or preserve compactness via controlled borrowing and consistent glosses.

The thesis adopts a methodological framework combining comparative contextual analysis, componential semantics, and pragmatic evaluation to operationalise functional equivalence for historical terms. The definition of componential semantics here is the decomposition of a term’s meaning into features such as institutional domain, rank, function,

temporal periodisation, and evaluative tone. The mechanism of application involves constructing a feature matrix for each problematic term and matching it against candidate English renderings, including options like calque, borrowing, descriptive translation, or approximate analogue. For example, a title can be analysed for features such as hereditary versus appointed status, civil versus military domain, territorial scope, and relation to fiscal authority, and the English rendering can be selected to preserve the highest-weight features in the given genre. Quantitatively, decision matrices can be scored by assigning weights to features based on textual function, enabling a semi-formalised selection procedure that reduces inconsistency across a long work. Scientifically, such scoring reflects multi-criteria decision-making approaches in applied linguistics, offering a transparent rationale that can be audited by editors and aligned with terminological management systems.

A comparative analysis demonstrates that different translation strategies achieve functional equivalence under different readership assumptions. The definition of readership competence refers to the target audience's familiarity with the historical period, tolerance for foreign terms, and need for fluency. The mechanism is that the same English solution can be optimal for specialists but suboptimal for general readers, so functional equivalence must be defined relative to a communicative situation rather than as an absolute. For example, in an academic monograph, borrowing a term with an initial gloss can preserve conceptual integrity, while in a museum guide a functional analogue plus brief description may better achieve immediate comprehension. Survey-based findings in translation reception studies indicate that specialist readers accept higher rates of transliteration and note apparatus, whereas general readers prefer fewer interruptions and show reduced retention when the text contains frequent unexplained borrowings; differences in preference can reach statistically significant margins across groups. Scientifically, skopos theory supports this conditionality by treating translation as purposeful action, yet the thesis refines this view by insisting that "purpose" in historical translation must include temporal authenticity as a communicative value in its own right.

To make strategy choice explicit, the thesis proposes a multi-parameter decision model for historical terminology. The definition of the model is a structured procedure that links term provenance, textual genre, pragmatic function, and audience competence to a recommended rendering type. The mechanism of the model operates in stages: first identify whether the term is institutional, socio-rank, legal, material-culture, or ideological; then profile its diachronic stability; then evaluate whether the term's function is primarily referential, indexical, or expressive; finally choose among borrowing, calque, descriptive translation, analogue, or mixed solution with glossing.

The analysis also considers the role of reference works and terminological standards, emphasising that dictionaries alone rarely suffice for historical equivalence. The definition of a reliable terminological basis includes diachronic dictionaries, scholarly commentaries, and parallel-text corpora from the same period and genre. The mechanism is triangulation: when a term appears in multiple sources, its collocations, syntactic frames, and pragmatic contexts can be compared, yielding a more stable feature profile than a single lexicographic entry. For example, aligning a translated chronicle with contemporaneous diplomatic correspondence may reveal that a term of address signals a precise rank relation that a modern dictionary glosses too broadly. Quantitatively, parallel-corpus alignment enables frequency and

concordance analysis, which can show that an English candidate term co-occurs with legal verbs at far lower rates than the source term does, indicating functional mismatch. Scientifically, corpus-informed translation studies justify such triangulation as a way to ground equivalence in observable usage patterns rather than intuition, thereby increasing the methodological rigour expected in OAK-aligned scholarly work.

In conclusion, achieving functional equivalence in rendering historical terminology into English requires treating terms as dynamic nodes within historical conceptual systems, not as isolated lexical items. The key findings show that non-equivalence arises primarily from semantic drift, genre-conditioned pragmatics, realia gaps, institutional anachronism, and terminological density, each of which demands different compensatory strategies. The proposed multi-parameter decision model synthesises contextual, semantic, and pragmatic variables to support consistent, auditable choices across texts and readerships. The thesis demonstrates that controlled foreignisation with selective glossing often best preserves temporal authenticity, while carefully constrained analogues can serve communicative clarity when audience needs demand it. Overall, functional equivalence is best achieved through evidence-based profiling of term behaviour and through editorially coordinated terminological policy that aligns linguistic choices with the epistemic aims of historical scholarship.

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