



# Subtitling in Audiovisual Translation Landscape: Review of Strategies

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Received: 08.04.2026 • Accepted: 14.06.2026 • Published: 16.06.2026 • Final Version: 16.06.2026

**Abstract:** Audiovisual Translation (AVT) has recently become one of the most thriving genres of translation studies, driven by the rapid technological advancements and their impact on media production and distribution. Subtitling, as one of the most recognized types of Audiovisual Translation (AVT), has established a prominent place in the field of translation, primarily due to the rapid growth of media and its impressive accessibility to audiences worldwide, regardless of their native language. Subtitling audiovisual products and the multimodality of texts are complex processes due to the unique nature of verbal and non-verbal components. This complexity creates various difficulties across the three major categories — cultural, linguistic, and technical — for translators working in subtitling. By contributing to the debunking of the myth of subtitling, this study aims to advance the flourishing genre of AVT as a fully fledged discipline with robust theoretical frameworks and practically sound practices by examining its fundamental techniques, strategies, and methods. Therefore, the study adopted a qualitative research methodology to critically analyze the core concepts and theoretical orientations of well-recognized subtitling taxonomies and to identify their contributions to the subtitling industry. The analytical comparison reveals that each taxonomy has a set of strategies that address a particular subtitling constraint. Therefore, translators working in the subtitling industry should have a thorough understanding of each taxonomy to implement it effectively and overcome various complexities and constraints, especially those associated with culturally bound expressions, linguistic nuances, and technical constraints. The study strongly recommends conducting further studies to investigate in depth the potential of these taxonomies to propose a unified taxonomy that would help translators working in the subtitling industry.

**Keywords:** Audiovisual Translation; Subtitling; Strategies; Techniques; Methods; Subtitling Taxonomies

## 1. Introduction

Audiovisual Translation (AVT) has recently become one of the most thriving areas of translation studies. Subtitling, as one of the most recognized types of AVT (Abdelaal, 2019), has gained prominence in the field of translation due to the rapid influx of media production and advances in technology that provide impressive accessibility to these media products. The ever-growing media industry has forced AVT translators to reconsider their theoretical and practical translation issues as they subtitle or dub enormous media productions into various languages. "Media outlets produce excellent films, but they also face challenges in communicating the stories to a diverse audience in a variety of languages." (Wahyudi et al., 2024, p. 67). These new challenges have increased the

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demand for audiovisual translation, particularly subtitling, to bridge the linguistic, interlingual, semiotic, and culturally bound expressions embedded in movies, TV shows, and theater series, to name but a few. Moreover, new technologies have driven demand for new media types that require subtitling and dubbing to reach audiences worldwide, regardless of their native languages.

A translator's job is to convey the meaning from the source language to the target language, usually from printed texts. These practices have been going on for decades. However, the situation appears entirely different when subtitling is used for verbal and nonverbal components, as in a movie scene accompanied by sound, images, and culturally oriented dialogue. At first glance, subtitling audiovisual products might seem one of the most straightforward types of AVT. However, audiovisual translators working in the subtitling industry encounter various types of complexity during translation, and subtitling is attributed to the combination of multiple modes, which are explained by Cintas (2008) as:

The combination of the acoustic and visual channels, together with the verbal and nonverbal elements, result in four basic elements of the audiovisual text: the acoustic verbal (dialogue), the acoustic nonverbal (score, sounds), the visual nonverbal (image), and the visual verbal element (subtitles) (p. 38)

They have to deal with three essential components of audiovisual products: text, images, and sounds, which are more multifaceted than translating printed text. Hence, subtitling audiovisual components, with their unique technical, linguistic, semiotic, and cultural features, has become a problematic area for most translators who are overwhelmed and struggle with the proper subtitling strategies, techniques, and methods that have a practical impact on overcoming the constraints and difficulties that directly impact, shape, and limit the quality of subtitling. Therefore, to reveal the myth that strategies, methods, and techniques elucidate these difficulties, the article aims to review subtitling techniques, strategies, and methods and their implications for dealing with the highly complex nature of audiovisual products and the multimodality of texts. The review of these strategies is based on the two fundamental categories, cultural and linguistic parameters, that constitute the bulk of the subtle constraints of audiovisual products. Moreover, the review details the contributions of various theoretical frameworks that significantly help decipher the ambiguity and complexity associated with subtitling, such as Gottlieb's taxonomy (1992), Pedersen's Taxonomy (2011), Díaz Cintas and Remael's Taxonomy (2007), and Schjoldager's Taxonomy (2008). To review these four taxonomies in more depth to spot the core concepts and theoretical orientations, the study addresses two questions:

- 1) What are the core concepts and theoretical orientation of Gottlieb's taxonomy (1992), Pedersen's Taxonomy (2011), Díaz Cintas and Remael's Taxonomy (2007), and Schjoldager's Taxonomy (2008)?
- 2) In what ways do taxonomies differ in terms of handling the subtitling constraints?

## 2. Literature Review

Subtitling is one of the most well-known modes of AVT and "..... perhaps the most common form of audiovisual translation, providing a written translation of the dialogue on the screen." (Tumba & Wibowo, 2024, p. 288). Most, if not all, of the media industry depends entirely on subtitling to distribute its products to a wide range of global audiences in different natural languages. Subtitling is translating the language of origin into the target language in a written format at the bottom of the screen, usually in two lines. Luyken et al. (1991, p. 31) define subtitling as "... condensed written

translations of original dialogue which appear as lines of text, usually positioned towards the foot of the screen". In the media industry, Subtitling is the process of rendering the meaning of spoken language (dialogue) into a written translation displayed at the bottom of the screen, usually in a form that is more precise than the spoken language, to enable the audience to read the message regardless of their reading speed. Antonini (2005, p. 213) explains the reduction strategies adopted by translators: "The words contained in the original dialogues tend to be reduced by between 40 and 75 percent to give viewers the chance of reading the subtitles while watching the film at the same time". This point highlights the need for a proper time to display subtitles on the screen during the original conversation, rather than disappearing immediately after the end. Likewise, Díaz Cintas and Remael (2014, p 8) define Subtitling as: "A translation practice that consists of presenting a written text, generally on the lower part of the screen, that endeavors to recount the original dialogue of the speakers, as well as the discursive elements that appear in the image."

### **2.1. Subtitling Strategies, Methods, and Techniques**

Within the realm of AVT, the expectation of producing high-quality subtitling is associated with selecting the most appropriate techniques, strategies, and methods that efficiently render meaning from audiovisual products. Generally speaking, strategies address "how" translation is done and suggest how the translator(s) can make sense of the source texts and tactics, including tactics for fixing problems detected during translation. Methods, on the other hand, describe the translator's plans in the pre-translation process. Based on that, translators working in AVT and subtitling apply strategies, methods, and tactics to handle the translation and subtitling of audiovisual products. Many studies have discussed strategies that have proved effective for subtitling audiovisual components and multimodal texts. (Setiawan, 2024; Seran, 2023; Taqi, 2024). The selection of a particular strategy is based on four factors: the translator's experience in the subtitling industry, the nature of the texts, and how subtitling translators plan to deal with their cultural, linguistic, and semiotic components, for instance, the targeted audience, and the proper strategy that successfully contributes to conveying meaning in the target language. Therefore, it is already recognized that translators rely on strategies and mechanisms to render meaning effectively. (Ensefalani, 2018; Nugroho, 2018; Suryani and Basari, 2016; Sawi, 2024). According to Putri and Suparto (2024), "The subtitling strategy is a method used by the translator who wants to translate the dialogues or narrations of the source text into the target text. The translator may have to use a subtitling strategy to refer to the most suitable technique." Various strategies have provided mechanisms and procedures for rendering meaning from audiovisual products. However, these strategies differ in their practical scope depending on the texts to be translated. AVT is quite different from translating general and specialized texts. The former has to deal with texts in various modalities, i.e., sound, images, and humor. Identifying which strategies best fit subtitling audiovisual products and translators' rendering of the meaning of multimodal texts is a fundamental constraint for translators working in the subtitling industry. Therefore, examining the components of the source texts is crucial for applying appropriate strategies that accurately and adequately convey meaning.

### **Methods of Translation**

The translation methods examined how elements of the source language are conveyed in the target language. (Hatim and Munday, 2004; Larson, 1984; Newmark, 1988). Some of the most recognized strategies and methods of translation in general and subtitling in particular, in addition to the most recognized models, will be explained below:

### **Multimodal Translation Method**

In translation, the concept of multimodality has gained prominence because of its complexity. (Huang, 2022; Pillière, 2021). Multimodal is represented in various modes in contrast to traditional texts, with minimal illustration components, often pictures, tables, graphs, and simple drawings meant for reading. However, as the name suggests, the term multimodality refers to texts that use multiple modes and semiotic resources, including sound, images, moving pictures, and language. Often, multimodal texts include some features of the semiotics mentioned earlier. According to Kaindl (2020, p. 58), multimodal translation is "a conventionalized cultural interaction in which a mediator transfers texts in terms of mode, medium, and genre across semiotic and cultural barriers for a new target audience." What makes subtitling multimodal components is the indispensable relation between various integrated modes in a text "combining two or more modes: multimedial (or audiovisual), multimodal (involving modes of verbal and nonverbal expression such as drama and opera), multi semiotic (involving different graphic systems, such as advertising brochures) and audiomedial (or texts written to be spoken, as political speeches)" (Snell-Hornby, 2006, pp. 84-86) to create meaning.

### **Equivalent Method**

The concept of equivalence posits a relation between source and target-language texts. Nida (1964) argues that in dynamic equivalence, the target text (TT) seeks to express the information from the source text (ST) in the most natural way possible, whereas in formal equivalence, the TT closely mirrors the ST in both form and content. She supports dynamic equivalence throughout most of her scholarly work, viewing it as a more effective translation method. Furthermore, "there is also the concept of cultural equivalence, and it is important to distinguish it from pragmatic equivalence." (Bekmurodova et al., 2024, p. 244). Equivalence exists if the target text fulfills specific requirements of the frame conditions (relatively permanent properties of the communicative situation). Frame conditions include content, style, and function. Equivalence exists if the target text has the same frame conditions as the source text (as the source text has in its situation). In this case, the target text is equivalent to the source text. It is not equivalent if it does not have the same frame conditions. The frame conditions for the content include the subjects of the communication, the object of the communication, and the viewpoints; those for the style include the sender, the transference author, the representation author, and the wording; and those for the function include the cognitive, aesthetic, and expressive functions.

### **Sánchez's Four Methods of Subtitling**

In the same context, Sánchez (2004, p 24) identified four methods of subtitling that can be recognized:

- 1) Preliminary translation – adaptation-spotting
- 2) Preliminary translation – spotting - adaptation
- 3) Adaptation – spotting- translation
- 4) Translation/adaptation – spotting

As proposed by Sánchez, these four methods entail three fundamental key concepts: 1) Translation, 2) spotting, and 3) Adaptation. For better clarification of each concept and its role in the translation and subtitling of audiovisual products, all these concepts are defined in precise terms as follows:

1) Translation is the process of rendering the meaning from the source language into the target language. Translation involves encoding and decoding the source text into the target text through complex linguistic, pragmatic, discourse, and sociolinguistic perspectives.

2) Spotting is one of the critical phases of subtitling audiovisual products. It represents the technical aspects of subtitling that allow for controlling and coding the time duration. The subtitles should be displayed in close harmony with the audio. According to (Www.xmc.pl, What is video subtitling? 2019), spotting is "The process of defining the in and out times of individual subtitles so that they are synchronized with the audio, and adhere to the minimum and maximum duration times, taking the shot changes into consideration."

3) Adaptation is adjusting all the audiovisual components (Images, soundtrack, etc.) involved in the source texts to fit into the target texts. This may include omissions, changes to textual elements, and character-related elements in a particular situation.

The audiovisual translator does the preliminary translation. He/she often receives the script for movie dialogue in print. The translators employ strategies similar to those used in translating literary texts. However, there might be slight differences between oral and written texts that must be fully considered. Typically, translation phases impose temporal constraints on correction strategies that address language rules, spelling, grammar, and syntax, ensuring the natural flow of the conversation. Adaptation, as one of the strategies subtitlers use, involves the critical stages of producing proper, accurate subtitling that should be in close harmony with the audiovisual components. Subtitlers must work meticulously, preparing subtitles using electronic devices (subtitling software) to ensure they align with the spoken text in meaning. Then, the last strategy applied, according to the first category, is the placement of subtitles on the screen, including the time required for projection and the synchronization of the subtitles' beginning and end with the dialogue in the movie.

The second method, Preliminary translation–spotting–adaptation, differs from the first method in the sequence of the translation process. Translation takes place first, focusing on spotting (related to the time required to display subtitling and reading speed parameters), and adaptation strategies are implied.

The third method is adaptation, which is spotting translation. The translation and subtitling process is initiated by applying adaptation strategies to the audiovisual components. Subtitles are prepared in different languages and created in the source language. They are then spotted into periods and translated into various languages. Finally, the translators work on those subtitles, applying appropriate translation and adaptation strategies.

The fourth method is Translation/adaptation – spotting. By applying this method, it is observed that the same individual translator does translation and adaptation simultaneously.

### **Subtitling Strategies**

Translators in the subtitling industry often encounter significant challenges related to the proper framework, which encompasses strategies, procedures, and methods that enable them to effectively convey meaning from audiovisual products. Nugroho et al. (2016) emphasize the necessity of having the intellectual properties to decide on the proper strategy for a given context:

Since translators are a central aspect of translation, the ability to employ appropriate translation strategies to overcome translation problems is used as a basis for determining the degree of professionalism in translation practices. The degree of professionalism here refers

to the creative solution performed by translators when they face translation problems. (p. 103).

Therefore, as a starting point, subtitlers must fully understand the practical application of each strategy to “determine which one is more appropriate in a given situation” (Schjoldager, 2009, p. 152) and which could effectively address a particular subtitling issue. Generally, subtitling strategies are classified into: 1) macro-strategies (source-text oriented and target-oriented based on the translators’ focus, either on the content and form of the source texts or the overall impact of the target text, where the semantic meaning is entirely excluded). (Schjoldager, 2009), Likewise, Nugroho et al. (2016) elaborate on the practical aspect of macrostrategies as:

Macrostrategies affect the text as a whole. These strategies emphasize a larger unit of discourse as their target. Furthermore, the strategies involve both target language (TL) and source language (SL) culture as the most important factor in the translation work. (P. 104)

### **Standardization**

Within AVT, standardization is one of the techniques and strategies used to translate multimodal texts. Standardization is a technique used to bridge the gap between the standard language used to convey meaning and the multimodality of texts, in which some speech peculiarities (accent, dialects, jargon, and slang) exist within the context to create mutual understanding between the translation and the audience. According to Llamas et al. (2007, p. 230), standardization within the field of translation is “(usually a historically significant dialect) which has been officially elevated to prestige status and is preferred in official documents, media, public and formal speech.” The power of the nations that speak English is associated with English’s status as a standard language. In English, Received Pronunciation (RP) represents British English (BE), and American English (AE) is globally recognized as the standard form of English. The same is true for Australia and New Zealand. The standard language is often associated with spoken (dialect and accent) and written (grammar, syntax, and spelling) skills. The role of translators is to be familiar with these variations for proper translation into the target language. Crystal (2011) contributes to the clarification of accents and dialects within the global context:

The majority accent of American English conveys little or no information about the speaker’s regional background. The accent is used, for example, by most radio and television presenters, and is not without some internal variation, but is thought of as chiefly excluding speakers with Eastern (New England) or Southern backgrounds. It is often referred to as Network English or Network Standard. (p. 207)

Standardization entails norms such as ideology, stereotypes, and culture-specific references, which are critical areas for translators to tackle in subtitling audiovisual products.

### **Foreignization and Domestication**

Foreignization and domestication are the most critical strategies and techniques in translation studies. Yang (2010, p. 1) states, “Domestication and foreignization are two basic translation strategies that provide both linguistic and cultural guidance.” The prominence of these strategies stems from their effective handling of linguistic and cultural elements, which pose challenges for translators and practitioners, especially when rendering meaning from culturally oriented texts into natural languages. Nida (1964, p. 244) mentions that “the larger cultural context is of utmost importance in understanding the meaning of any message, for words have meanings only in terms of the total cultural setting.” These techniques have contributed much to revealing the myth of cultural

references and linguistic variations deeply rooted in several audiovisual products. Moreover, the relationship between language and culture is indispensable and cannot be reduced to translation alone. Audiovisual products are rich in cultural components and linguistic variation. Venuti (1995, p. 20), the American translation theorist who first coined the terms "Foreignization and domestication, points out that Foreignization is "an ethnocentric reduction of the foreign text to target-language cultural values, bring the author back home." In contrast, domestication is "an ethnoveiant pressure on those (cultural) values to register the linguistic and cultural difference of the foreign text, sending the reader abroad." Based on Venuti's contribution, the former indicates how translators address the strangeness and peculiarity of linguistic and cultural representations in the source text for the target-text audience. On the other hand, the latter indicates the massive attempts by translators to bring the elements of foreignness present in the source-language text into the target text. According to Venuti (1995, p. 20), "Domestication and foreignization deal with 'the question of how much a translation assimilates a foreign text to the translating language and culture, and how much it rather signals the differences of that text.'"

### Adaptation

Adaptation is an essential practice in subtitling audiovisual components. It often goes through various phases that subtitling translators must carefully consider. Bastin (2009) proposes seven relevant adaptation procedures. His contribution has paved the way for audiovisual translators and practitioners who work primarily in the subtitling industry to discern the various procedural levels of adaptation.

**Table 1.** Adaptation Procedures

Modes	Procedures
(1) Transcription of the original	Word-for-word reproduction of part of the text in the original language, usually accompanied by a literal translation.
(2) Omission	The elimination or implication of part of the text
(3) Expansion	The addition or explicitation of source information, either in the main body or in a foreword, footnotes, or glossary
(4) Exoticism	The substitution of stretches of slang, dialect, nonsense words, etc., in the original text by rough equivalents in the target language (sometimes marked by italics or underlining)
(5) Updating	The replacement of outdated or obscure information with modern equivalents
(6) Situational or cultural adequacy	The recreation of a context that is more familiar or culturally appropriate from the target reader's perspective than the one used in the original
(7) Creation	A more global replacement of the original text with a text that preserves only the essential message/ideas/or functions of the original

**Adaptation Procedures (Bastin, 2009, p. 11)**

### Review of Theoretical Subtitling Taxonomies

Many strategies have proved effective in subtitling audiovisual components and multimodal texts. The selection of a particular strategy is based on various factors, including, but not limited to, the translator's experience in the subtitling industry, the nature of the texts, and the strategy that most effectively conveys meaning in the target language. To identify effective subtitling strategies, this part of the article comprehensively reviews the definitions and classifications of the most recognized taxonomies that contribute to the subtitling process, addressing the constraints and complexities associated with rendering meaning from well-connected modes. The most recognized subtitling

taxonomies include the theoretical frameworks of Gottlieb (1992) and Pedersen (2011), which are based on Gottlieb's work. Furthermore, Díaz Cintas and Remael's taxonomy (2007) is explained in detail to identify strategies that address various components of the acoustic and auditory contexts in audiovisual products. The review also includes the taxonomy proposed by Pettit (2009) and Schjoldager's Taxonomy (2008).

### Eight Strategies in Film Subtitling

Subtitling a film is a complex task for translators in the subtitling industry. The main constraints in subtitling films stem from the interplay of multimodal and semiotic features in meaning-making (Cintas & Remael, 2021). Therefore, determining which strategies best fit the process of generating meaning is a challenge. The fact is that the translation mode usually limits the strategies available to translators. For example, Tomaszewicz (1993) once discussed eight strategies in operation in film subtitling (see Table 2) (Tomaszewicz, T. quoted in Pettit, 2009). Pettit quoted in Díaz Cintas, Jorge (2009):

**Table 2.** Eight strategies in film subtitling

Strategies	How to do
(1) Omission	The cultural reference is omitted altogether
(2) Literal Translation	The solution in the target text matches the original as closely as possible.
(3) Borrowing	Original terms from the source text are used in the target text
(4) Equivalence translation	Has a similar meaning and function in the target culture
(5) Adaptation	The translation is adjusted to the target language and culture to evoke connotations similar to the original. Strictly speaking, this can be considered a form of equivalence.
(6) Replacement of the cultural term with a deictic	Particularly when supported by an on-screen gesture or a visual clue.
(7) Generalization	Neutralization of the original
(8) Explication	A paraphrase to explain the cultural term

**Eight strategies in film subtitling (Pettit, 2009, p. 45)**

### The Theoretical Orientation of Gottlieb's Taxonomy (1992)

Gottlieb's theoretically oriented taxonomy of subtitling comprises strategies for overcoming difficulties associated with time constraints and the volume of text on the screen. However, these might be considered technical aspects of subtitling; the taxonomy proposed strategies to reduce text volume to fit within a screen, with a maximum of 35 characters. (Gottlieb, 1992, p.164). Gottlieb's analysis of subtitling and the constraints imposed on it views subtitling producers as subject to time and space constraints. The taxonomy includes a range of strategies, further explained in Table 3.

**Table 3.** The Theoretical Orientation of Gottlieb's Taxonomy

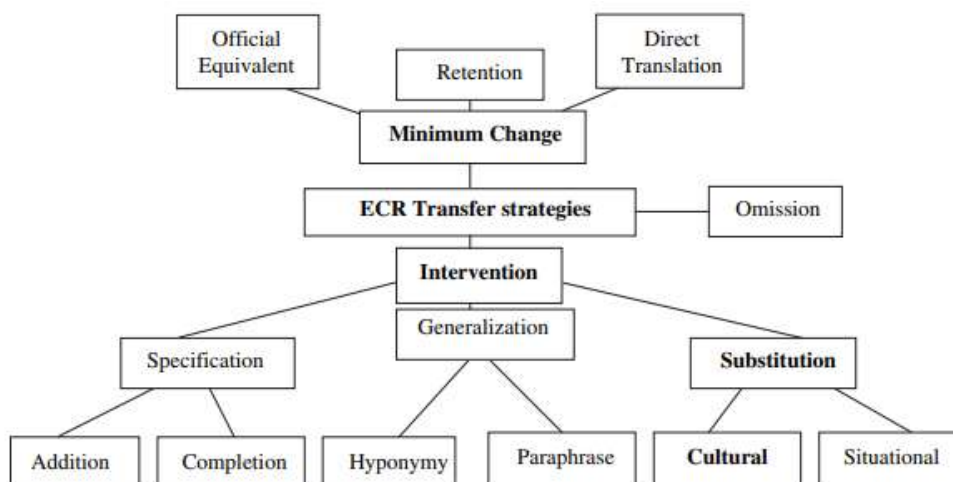
Strategies	Application
Expansion	Adding more details to the source texts to render a possible translation in the target texts
Paraphrasing	Failing to reconstruct the phraseology of the source texts
Transfer	Attempting to translate the source texts accurately.
Imitation	Keeping the same form associated with names, places, etc.
Transcription	The source texts contain unfamiliar words or phrases.

Dislocation	Some sound effects, a sign, and a song contribute to meaning rather than the context.
Condensation	Shortening the text in a way that does not distort the meaning.
Decimation	Dealing with the discourse speed through condensing utterances.
Deletion	Eliminating some parts of the verbal or written speech
Resignation	Failing to render a proper translation results in the meaning being completely lost.

**The Theoretical Orientation of Gottlieb's Taxonomy (Gottlieb, 1992, p.76)**

### Theoretical Orientation of Pedersen's Taxonomy (2011)

Pedersen (2011) has proposed a comprehensive taxonomy for dealing with culture-bound expressions. He "tries to explain why an ECR has been rendered in a certain way in a subtitle, giving a relevant contribution to the theoretical discussion that is taking place in audiovisual translation studies." (Pedersen, 2011, p. 162). Based on his taxonomy, most subtitling difficulties revolve around Extralinguistic Cultural References (ECR), which he further explained as "a reference that is attempted by means of any cultural linguistic expression which refers to an extralinguistic entity or process." (Pedersen, 2011, p. 43). The taxonomy is illustrated in Figure 1.



**Figure 1.** Taxonomy of subtitling strategies (Pedersen, 2011, p. 43)

### Theoretical Orientation of Díaz Cintas and Remael's Taxonomy (2007)

Díaz Cintas and Remael (2007) identified strategies for dealing with cultural references. Their taxonomy entails a set of strategies that are more effective for handling cultural references, contemporary culture, and pop culture in target texts, given the cultural diversity across languages. According to Diaz-Cintas and Remael (2007, p. 46), "culture-bound references in themselves are always subject to ideological framing." A detailed description of the strategies and their potential applications is presented in Table 4.

**Table 4.** Diaz-Cintas and Remael Taxonomy

Strategies	Application
Transposition	Attempting to subtitle cultural items in the source texts with an acceptable equivalent in the target texts
Calque	Applying slight changes to the concept in the source texts to the target text. Usually in a more literary manner.
Explication	Attempting to explain the cultural term in the source text in a more comprehensive and accessible way for the target audience.

Cultural adaptation	Adapt the source texts' culture to the target text culture. It has three types: 1) Limited universalization, when replacing a cultural term in the source text with the appropriate meaning in the target text, usually for subtitling idioms, proverbs, sayings, etc., 2) absolute universalization, when using neutral terms to convey the sense in the target texts, and 3) substitute or even naturalize a particular cultural item.
Generalizations	A hypernym technique addresses cultural items that are not accepted in the target text.
Loan	A strategy used to transfer names, for instance, from the source to the target text.

**Diaz-Cintas and Remael Taxonomy (Diaz-Cintas & Remael, 2007, p. 19)**

### Theoretical Orientation of Schjoldager's Taxonomy (2008)

Schjoldager's subtitling taxonomy is based on Gottlieb's taxonomy. He proposed 12 strategies for translators to transfer language to the screen, classified as micro-level strategies. The strategies, potential possibilities, and applications are presented in the Table below.

**Table 5.** Schjoldager's Taxonomy

Strategy	Application
Direct Transfer	This approach does not translate the source text but instead conveys it directly into the subtitle, similar to subtitling for the hard of hearing in the same language.
Calque	His strategy presents a translation for the source text words with a very close structure. Sometimes it results in the target text sounding.
Direct Translation	This strategy does not need explanation because it transfers the source meaning to the target.
Oblique Translation	It is similar to direct translation but involves transferring the whole source context.
Explication	This strategy can make the implicit information in the source text as explicit as possible in the target text.
Paraphrase	It gives the translator greater freedom to formulate the target text's meaning as they see fit while preserving the source text's main content.
Condensation	This strategy allows the translator to shorten subtitles within time and space constraints, thereby overcoming technical challenges. The condensation is sub-classified into two types: A- Condensation and reformulating at the word level, and into six types. B- Condensation and reformulation at the sentence level are classified into nine types.
Adaptation	This is used when the source text contains a word or reference that does not exist in the target language for specific linguistic or cultural reasons. Additionally, it is not widely used in subtitling; it is used only when the translator wants to add something to the source text.
Addition	It is not commonly used in subtitling and is typically used when the translator wishes to introduce additional content to the source text.
Deletion	This method is enacted when an element from the source text is omitted due to technical, cultural, or linguistic limitations. Deletion can be divided into two types: a. Omission at the word level, b. Omission at the sentence level.
Substitution	Translators resort to this strategy when replacing the source meaning with an alternative in the target language. They typically avoid this approach to keep the target 'subtitle' aligned with the source unless it serves a specific purpose.
Permutation	Translators use this method when they incorporate certain elements from the source into the target to address specific challenges, such as humor or wordplay.

**Schjoldager's Taxonomy (Schjoldager, 2008, p.92)**

### 3. Methodology

The research paper employs a qualitative approach research methodology to examine subtitling taxonomies in the context of AVT by analyzing and comparing well-known taxonomies presented

in Gottlieb (1992), Diaz Cintas & Remael (2007), Pedersen (2011), and Schjoldager (2008). Due to the nature of this research, which does not collect empirical data or involve human participants, it relies on a systematic approach grounded in a rigorous conceptual analysis of existing subtitling taxonomies. This comparative synthesis examines the scope, philosophies, abstract ideas, theoretical orientations, and contributions of these four subtitling taxonomies within the Audiovisual Translation landscape.

#### 4. Discussion

1) What are the core concepts and theoretical orientation of Gottlieb's taxonomy (1992), Pedersen's Taxonomy (2011), Díaz Cintas and Remael's Taxonomy (2007), and Schjoldager's Taxonomy (2008)?

The four well-known subtitling taxonomies form the foundation of Audiovisual Translation studies, clearly outlining how subtitling functions within AVT and how translators in the industry handle the transfer of spoken language into written lines on screen, addressing the core linguistic, technical, and cultural challenges. These four taxonomies work hand in hand to effectively and efficiently bridge the theoretical and practical gaps in the subtitling industry, seeking to balance semiotic restoration, a primary characteristic of multimodal texts, with textual flow. However, they differ significantly in scope and analytical focus when addressing the various constraints of subtitling. Therefore, the core focus and the theoretical orientation of the four taxonomies are represented in the more comprehensive analytical taxonomy to establish a critical comparison to identify the gaps in each taxonomy and how translators working in the subtitling industry would benefit from the convergence and divergence of the core concepts and practical considerations of the subtitling taxonomies. The analytical comparison of the four taxonomies is presented within the scope and framework, alongside the primary contribution of each taxonomy, ranging from the macro-level definition of subtitling to the micro-level collection of practical tips that enhance subtitling production. These major differences are presented in the following table.

**Table 6.** The Core Differences between Gottlieb, Díaz Cintas, and Remael, Pedersen, and Schjoldager taxonomies

Subtitling Taxonomy	Paradigm	Macro vs. Micro Division?	View on Subtitling	Key Limitation	Best Applied When
Gottlieb (1992)	Descriptive AVT	No. Focuses purely on 10 linguistic micro-operations.	An inherently constrained, "diagonal" text-reduction process.	No cultural or semiotic dimension; limited to linguistic compression only.	Analyzing text-reduction challenges: speed, character count, and line limits.
Díaz Cintas & Remael (2007)	Pedagogical / Semiotic AVT	Partial. Categorizes subtypes (Macro) and offers flexible translation tips (Micro).	A multi-semiotic practice where text, sound, and image interact.	Broad scope may reduce practical precision; less prescriptive on cultural handling at the micro-level.	Establishing professional, technical, and institutional subtitling guidelines for a film.
Pedersen (2011)	Pragmatic / Cultural AVT	Yes. Explicitly divides choices into Source-Oriented vs. Target-Oriented macro-ideologies.	A crisis-management toolkit for cultural mismatches on screen.	Narrowly focused on ECRs; does not address technical or linguistic compression constraints.	Handling culture-specific references and Extralinguistic Cultural References (ECRs).
Schjoldager (2008)	Functionalist General Translation	Yes (Strict). Forces the translator to choose between Source-Text or	A specific communicative act governed by general translation behavior.	Derived from general translation theory; may not fully capture AVT-specific multimodal constraints.	Evaluating overall translator orientation (source- vs. target-text

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Target-Text  
orientation first.

loyalty) at a  
macro level.

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**The Core Differences between Gottlieb, Díaz Cintas, and Remael, Pedersen, and Schjoldager Taxonomies**

The table No. (6) clearly states the distinction of the contributions of various subtitling taxonomies in terms of scopes, framework, and contribution to the subtitling industries. Based on the analysis of these comments, it could be stated that the Gottlieb taxonomy identifies the subtitling process as a “diagonal” translation from spoken to written, contrasting the mode that moves back and forth horizontally (texts to text) and vertically (spoken to spoken). Therefore, translators are in a position to change both modes and the language simultaneously. On the other hand, Díaz Cintas and Remael provide a macro-taxonomy for dealing with linguistic issues associated with interlingual and intralingual texts and with how these issues are subtitled. Moreover, their taxonomy also addresses the technical availability of subtitling. When it comes to the micro-strategies outlined by Gottlieb and Pedersen, Gottlieb proposed 10 universal subtitling strategies applicable to various spoken languages, whereas Pedersen focuses on translation directionality based on translators’ L1 and L2 and how they assimilate cultural distinctions between the two languages. Pedersen’s translation mechanism is entirely based on structured, source- and target-oriented strategies to address monocultural constraints. In the same context, Schjoldager’s taxonomy focuses on general translation studies, proposing 12 strategies that operate in a top-down hierarchy across macro and micro levels and intersect with the taxonomies of Gottlieb and Pedersen, regardless of the variation used to describe linguistic phenomena in the source texts.

In the same context, the four taxonomies embrace a distinct paradigm shift within the landscape of AVT. Gottlieb’s approach is descriptive, lacks a clear macro representation, and provides only facts about the translation process rather than offering empirical validation of how translation is carried out. The taxonomy provides only 10 strategies for subtitling that treat subtitling as a text-reduction process. In contrast, Díaz Cintas & Remael’s (2007) taxonomy provides a methodological approach to analyzing the polysemiotic components of multimodal texts and to identifying how signs, images, and sounds interact and affect the understanding of AVT content, offering flexible and practical guidance for doing so. Meanwhile, Pedersen’s (2011) approach is mainly pragmatic, focusing on understanding the social and cultural nuances embedded in audiovisual content by dividing choices into source- and target-oriented macro ideologies that address cultural mismatch. Compared to the three taxonomies, Schjoldager’s (2008) approach stems from functionalist general translation, which focuses on the purpose of translation rather than on producing an equivalent text in the target language. Therefore, her approach recommends that translators choose between source-text and target-text orientation as the initial step in translation, which advocates translation as a communicative act governed by general translation behavior.

A critical evaluation of these four taxonomies reveals not only their individual strengths but also significant gaps that limit their independent applicability. Gottlieb’s taxonomy (1992), while pioneering in its systematic identification of ten subtitling strategies, operates exclusively at the linguistic micro-level and does not account for the semiotic or cultural dimensions that are integral to audiovisual meaning-making. Its descriptive, non-prescriptive nature means it provides no hierarchy of strategy selection, leaving translators without guidance on when to prefer condensation over deletion. Díaz Cintas and Remael’s taxonomy (2007), by contrast, offers a broader semiotic framework and is particularly valuable for professional training contexts; however, its flexible and comprehensive scope can paradoxically reduce its practical precision when translators must make rapid micro-level decisions. Pedersen’s taxonomy (2011), arguably the most empirically grounded of the four, is anchored in the specific challenge of Extralinguistic Cultural References (ECRs) and

introduces valuable contextual parameters — such as polysemiotics and centrality — that account for how screen images affect strategic choice. Yet it remains narrow in scope, offering limited guidance for non-cultural challenges such as syntactic compression or humor transfer. Schjoldager's taxonomy (2008), rooted in functionalist general translation theory, is the only framework that explicitly situates subtitling within a top-down macro- to micro-strategy hierarchy; however, its origins in written-text translation theory mean it may inadequately capture the real-time, multimodal constraints unique to screen translation. Crucially, none of the four taxonomies accounts for the interactive relationship between strategies — that is, how a translator's macro-ideological choice (source- vs. target-oriented) invariably shapes the micro-strategies deployed in practice. This cross-taxonomic gap constitutes a major limitation of the existing literature and underscores the urgent need for a unified, eclectic subtitling framework that can serve practitioners across the full range of AVT contexts.

Consequently, based on the analytical comparison of the four subtitling taxonomies, it can be stated that all of them analyze how meaning shifts during the semiotic transfer from the spoken language (Source) to the written language (target) through structural compression, stylistic omission, and cultural adaptation. Moreover, these taxonomies encompass a range of macro-linguistic approaches to syntax and pacing, as well as macro-cultural approaches to appropriately introducing the target culture to an audience with diverse cultural backgrounds.

2) In what ways do taxonomies differ in terms of handling the subtitling constraints?

Díaz Cintas and Remael (2007) provide a broad overview, mapping the entire landscape of AVT as both an academic discipline and a professional industry. Gottlieb (1992) explains the linguistic mutations that happen when spoken words are forced onto a static line of text. Finally, Pedersen (2011) provides an exact, empirical methodology for rescuing cultural meaning when languages clash on screen. While Díaz Cintas & Remael, Gottlieb, and Pedersen were developed specifically for the unique, time- and space-constrained world of audiovisual translation (AVT), Schjoldager's taxonomy stems from general translation studies (primarily written prose). Applying her taxonomy to subtitling shifts the conversation from “how do we compress text for screens?” to “how does screen translation fit into the broader rules of global communication?” In terms of the capacity of subtitling constraints, Gottlieb treats constraints as a linguistic filtering process. The translation strategies themselves are defined by how much information is left behind (e.g., deletion removes peripheral items, while decimation removes critical items due to extreme speed), whereas Díaz Cintas & Remael examine them through a semiotic lens. They emphasize that subtitles coexist with the image and sound. Therefore, text can be omitted safely if the visual track or the actor's body language (kinesics) fills in the semantic gaps. On the other hand, Pedersen introduces a highly systematized list of influencing parameters. He argues that a subtitler's strategic choice is determined by factors like media-specific constraints (time and space), polysemiotics (how much the image explains the cultural reference), and centrality (how important the specific word is to the movie's plot). Likewise, when we look at line-by-line translation, Schjoldager's taxonomy of 12 micro-strategies intersects in fascinating ways with Gottlieb's and Pedersen's taxonomies. They often describe the exact same linguistic phenomenon using entirely different terminology.

Having identified the most frequently encountered difficulties in subtitling, selecting a particular taxonomy or strategy would facilitate tackling the problem. For instance, the Gottlieb taxonomy is appropriate for understanding the challenges associated with text volume, speed, and character count. Similarly, he suggested that expansion, paraphrasing, transfer, imitation, transcription, dislocation, and condensation provide precise translations of the relevant parts. Moreover, strategies such as

discrimination and deletion are ideally used when semantic or stylistic elements do not align with the subtitling process. Finally, resignation is present in all forms of verbal communication — his suggested strategies aid in comprehending the rationale behind the translator's chosen translation method. On the other hand, Schjoldager's taxonomy, based on the fingerprints of the Gottlieb taxonomy, identified 12 strategies that are likely to be of great value when translation and subtitling are done at the micro-level, with a greater focus on form and content. In the same context, Díaz Cintas, Remael, and Pedersen's taxonomies address the challenges of subtitling culturally bound expressions. The taxonomies provide a set of strategies that play a crucial role in bridging language gaps by understanding the implications of each. For instance, transposition for acceptable equivalents in the target texts, Explicitation makes cultural terms more accessible and comprehensible to the target audience, and generalization addresses cultural aspects considered unsuitable or offensive in the target text. Finally, Pettit's taxonomy provides specified strategies for subtitling films. The taxonomy provides strategies for addressing a film's verbal and nonverbal components.

Arriving at the best strategies demands a thorough understanding of the micro-level strategies that help determine how a text should be translated, while these strategies support individuals in dealing with partial parts of audiovisual products, such as a sign or a sound that conveys meaning. The taxonomy discussed has a significant impact on the subtitling process. However, most advocated strategies have proven more effective at resolving cultural issues. Therefore, translators working in the subtitling industry must embrace problem-solving approaches and decision-making strategies, along with a deep understanding of the practical implications of each.

## 5. Implications

The question of which strategy or taxonomy best assists translators in rendering meaning from multimodal products remains controversial due to the unrealistic and illogical assumption that a single standard strategy fits all contexts. However, various scholars in the field emphasized the need for a standardized translation framework. (Shasha Qi, 2025; Wang, 2021; Strandvik, 2025). What remains important in the first place, even before considering which strategy or taxonomy to apply, is identifying the various types of subtitling and their associated problems, and putting translators on the right track to make the right decision. Consequently, deep knowledge and understanding of the subtitling types, constraints, difficulties, and practical implications of strategies and taxonomies would facilitate the successful rendering of meaning from audiovisual products.

Translators working in subtitling face enormous difficulties in rendering meaning from audiovisual products. These constraints are represented in three main categories:

- 1) Cultural parameters: Culture seems to intervene with various texts, including multimodal texts. Cultural accounts have been seen in TV shows, movies, interviews, and documentaries. Venuti (1998, p. 67) argues that “translation wields enormous power in constructing representations of foreign cultures.” That power shapes communication in cross-cultural contexts, where subtitling cultural nuances is more complex, owing to the peculiarities of culturally oriented texts.
- 2) Linguistic Parameters: The variation of linguistic systems among languages creates unlimited complexities for subtitling professionals. This diversity in the languages' linguistic systems creates ambiguity associated with equivalence, word order, and word collocations. (Furgani, 2016). In the same context, the linguistic challenges are numerous, with various issues associated with syntactic and lexical choices. (Thawabteh, 2011). The constraints of subtitling from a linguistic perspective are of two types: interlingual and intralingual. Shahooth et al. (2015) explain various challenges

faced by subtitling translators associated with linguistic issues: 1) Problems with tense, 2) Changing Questions to Statements or vice versa, 3) Changing Negative to Affirmative and vice versa, 4) Problems with Modality, 5) Homophones, and 6) Collocations.

3) Technical Parameters: The constraints associated with technical parameters shape the quality and the final production of subtitling on the screen and are “the prominent type of challenges in the subtitling process, which causes some restrictions on the work of the translator, unlike translating written texts” (Díaz-Cintas & Remael, 2010, pp. 19-21). Time, space, characterization, spotting, position on the screen, and font size and type are the most common technical difficulties in subtitling.

## 6. Conclusion

The analytical comparison of the four subtitling taxonomies has revealed that each taxonomy has specific merits in addressing a particular subtitling constraint. Consequently, translators working in the subtitling industry must review each taxonomy’s potential and how the included strategies would enhance their decision-making when rendering meaning from audiovisual products. For instance, they may use Díaz Cintas & Remael (2007) to establish the film’s professional, technical, and institutional landscape (e.g., technical constraints, line breaks, genres), apply Pedersen if they are faced with cultural references in audiovisual products, use Gottlieb taxonomy to reduce the portion of the spoken source words into short, readable written texts on the screen and use Schjoldager (2008) if they want to step back from the video file itself and evaluate whether the subtitler approached the film with an overall loyalist (Source-Text oriented) or adaptational (Target-Text oriented) philosophy. Critically, however, these findings expose a fundamental limitation in the current state of subtitling scholarship: no single taxonomy is sufficient to address the full spectrum of linguistic, cultural, and technical constraints that characterize professional subtitling practice. Gottlieb’s ten strategies excel in managing spatial and temporal compression yet remain silent on cultural mediation; Pedersen’s framework provides granular guidance for ECRs but offers no mechanism for syntactic restructuring or humor transfer; Díaz Cintas and Remael’s polysemiotic approach enriches understanding of audiovisual channel interaction yet its breadth may impede rapid micro-level decision-making; and Schjoldager’s functionalist hierarchy provides the clearest macro-to-micro pathway but leaves key AVT-specific constraints undertheorized. Taken together, these taxonomies represent complementary rather than competing frameworks. Their integrated deployment — an eclectic, context-sensitive approach — offers the most robust pathway toward professional excellence in subtitling. This study therefore strongly advocates for future empirical research that systematically tests the interoperability of these four taxonomies across diverse language pairs, media genres, and cultural contexts, with the ultimate aim of proposing a unified, evidence-based subtitling framework capable of guiding translators through the full complexity of real-world AVT practice.

The study’s findings acknowledge a limitation of the review: relying solely on theoretical and descriptive literature may not capture the current applications of these taxonomies. Therefore, investigating the practical application in depth requires more similar studies to arrive at a combination of these taxonomies to address the most recognized subtitling constraints, which are mainly associated with the three main categories: linguistic, cultural, and technical.

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