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RÉSUMÉ

Nous abordons ici la question des contraintes liées au processus de traduction, notamment pendant l'étape de la préparation du surtitrage des opéras, une méthode de traduction audiovisuelle qui semble susciter peu d'intérêt universitaire. Bien que le mot *contrainte* ait une connotation négative, la contrainte peut souvent se révéler utile car elle restreint le champ des possibilités et entraîne le choix de techniques et de stratégies. Nous présentons dans cet article une classification des contraintes liées au processus de surtitrage, y compris celles résultant de la performance musicale, du type de public et de la pertinence, ainsi que les conséquences de ces contraintes sur l'ensemble du processus de traduction. En conclusion, nous notons que prendre conscience des contraintes liées au surtitrage des opéras aide à comprendre la logique de ce type de traduction et permet ainsi d'élaborer des surtitres de qualité.

ABSTRACT

The article addresses the problem of constraints typical of opera surtitling, an audiovisual translation modality that seems rather neglected as far as the academic discourse is concerned. Although the term *constraint* may appear to have mainly negative connotations, it seems that the idea of a constraint may often prove helpful, since it may facilitate the process of translation by restricting the scope of possibilities and hence justify the chosen techniques. The article is meant to propose a classification of potential constraints on the surtitling process, including the constraint of a live performance, music, audience design or relevance, and the resulting implications for the whole process. It is argued that the awareness of the constraints operating in the process of drafting surtitles helps to understand the rationale behind this particular translation activity and consequently helps to draft good quality surtitles which serve their original purpose.

RESUMEN

El artículo toca asuntos relacionados con entender limitaciones en el proceso de traducción (translational constraints) que surgen en el caso de preparar sobretitulaciones de ópera (del inglés:opera surtitling), que son considerados una de las modalidades (modality) de traducción audiovisual. A pesar de que la palabra "limitación" conlleva sobre todo matices negativas, parece que las mismas limitaciones que acompañan la traducción pueden frecuentemente resultar útiles, porque de manera explícita limitan las posibilidades de traducción al mismo tiempo que indican técnicas o estrategias correctas. En el artículo se presenta una clasificación de limitaciones que pueden surgir en el momento de preparar sobretitulaciones de ópera, entre otras, limitaciones que resultan de la actuación, de la música, del perfil de auditorio, de la pertinencia. Se argumenta que el conocimiento de las limitaciones que surgen en el proceso de preparar sobretitulaciones de ópera ayuda a entender la esencia de este método de traducción y, por consiguiente, permite preparar sobretítulos de calidad que cumplen su función básica.

1. The Idea of Constraints

Etymologically, the word *constraint* may be related to rather negative images of oppression or distress. *The Merriam-Webster Dictionary of English*[1] defines the word as "the state of being checked, restricted, or compelled to avoid or perform some action" or "a constraining condition, agency, or force." As a result, the idea of a constraint has negative connotations. In the area of translation studies it may be viewed as any potential and objective factor present in the process of translation, a factor which limits the performance of translators, meaning that they have to apply some problem-solving strategies in order to arrive at a relevant or appropriate target text.

Towards the end of the sixties, a Czech scholar Jiří Levý (1967) stated that translation may be seen as a process of communication in which the translator has to make decisions at various levels, choosing from a number of possibilities. Bearing in mind readers and their expectations, the translator makes decisions which are not always arbitrary: they are results of both conscious and subconscious instructions which generate specific solutions visible at the textual level. As put forward by Levý (1967), it is mainly the pragmatic aspect of the translation that plays a decisive role. For instance, according to the minimax strategy, which he advocated, the translator will usually opt for the most effective solutions which necessitate a minimum amount of effort, an idea which was later elaborated on by Gutt (1991).

The choices of the translator will be usually limited globally by various factors stemming from the context in which the process of translation takes place. The actual number and nature of such factors will normally depend on the overall strategy which is to be adopted, languages and cultures in question as well as the type of translation, e.g. translation of a poem, comic or a song (Mayoral, Kelly *et al.* 1988). Apart from global constraints resulting from the general characteristics of the process, the translator will be naturally faced with a number of other limitations related to specific issues, e.g. rhymes, irony, intertextuality, expletives or the so-called culture-bound items (including names of dishes, dances, items of clothing, etc.), all of which frequently present the translator with a number of complex problems.

At this point it seems crucial to differentiate between the two concepts, i.e. *constraints* and *translation problems*. The latter can be understood as problems stemming from the nature of the source language and culture. A translation problem may occur mainly because of two reasons: firstly, there is a structural difference between the source and target language, for instance, the former lacks the category of grammatical gender, which compels the translator to search for relevant clues globally in the text. The other reason would be the cultural difference: a given concept does not exist in the target culture and, hence, the translator has to face a problem of rendering it by means of transferring the concept, describing it, giving a comment, using a functional equivalent etc. (Newmark 1988). Cultural differences will normally include all types of allusions to the literary tradition of the source culture, instances of culture-based humour or irony. A translator has a number of techniques or procedures at hand which may be helpful in dealing with such problems and the choice is most frequently made by him or her. Therefore, it may be assumed that the actual solution to a translation problem will be translator-dependent and thus subjective.

Constraints, on the other hand, will be understood as objective impediments limiting the decision of the translator and coming from factors other than the ones

mentioned in the previous paragraph. Then, constraints will be results of some external factors, including a specific context of the translation activity, a translation brief with a clearly stated goal and strategy, a specific target audience design or other semiotic systems which influence the overall meaning. As a result, the actual procedure aimed at dealing with specific constraints will tend to be translator-independent, since the potential solution will be indicated by external factors: translating a comic will be constrained by the presence of visual codes and certain spatial limitations, which will give grounds to using only the appropriate and acceptable techniques.

A good illustration showing how the strategy may globally restrict the translator's choices seems visible, for example in the functionalist approach. It underlines that translation, understood as an act of communication, should be perceived in the context of its function in a specific situation. The approach was advocated among others by Reiss and Vermeer (1984), who developed a general theory of translation and for whom the idea of the *skopos*, the goal of translation, seemed the overriding element shaping the decision process. Any text should be interpreted as an offer of information for a given circle of recipients. The source text will be perceived only as an offer of information for the translator who has to consider the target reader and determine how the translation will function within the target culture, employing certain strategies and techniques. A typical process of translating interlingually may be externally constrained by the goal which will consist in translating it for a new audience not intended by the source text author. It will mean, then, that the target text will have to function in a different context, which will call for certain changes to the textual make-up. It may follow, then, that the idea of constraints will often involve revisiting the traditional understanding of equivalence, translating rather dynamically, considering extralinguistic information as well as, most probably, accepting a certain degree of translation loss.

A slightly different framework of constraints, both global and specific, was demonstrated by Toury (1995) and later on by Chesterman (1997). The former introduced the idea of norms in translation, which he understood as observable instructions indicating what to do in a given situation, basing on some accepted standards or regularities of behaviour. Such norms are observable in the process of analysis and are fairly objective. What is also important is the fact that they act as constraining elements since they are connected with culture, society or the temporal conditions under which an act of translation takes place.

2. Constraints as a Focal Point in AVT

In certain cases of translation, the limiting factor will come down to aspects other than the linguistic, social or cultural ones. In 1982, Titford published a seemingly seminal article on a very specific method of translation which he addressed by the name "sub-titling" and which he described as an example of constrained translation. The idea seems to have been fairly prominent, since the term "constrained translation" used to be one of the names applied to the whole domain of audiovisual translation (AVT) (Chaume 2012). Moreover, this feature, i.e. being constrained, still seems one of the characteristics and problems of this domain.

Titford indicated that it is the medium itself that limits the choices of the translator. The main problem pertains to the question of readability of subtitles, i.e. the

length of lines and the exposure time. As a matter of course, such spatial and tem-poral limitations require a pragmatic approach from the translator, whose job is consequently limited by "three dimensions," including the change of the medium (from aural to written), the problem of coherence and cohesion of the subtitle list as well as the relation between the image and the word (Titford 1982: 113).

The fact that subtitles are read rather than listened to poses a fundamental prob-lem and creates a significant conflict between the dynamic image (onscreen action) and strips of text projected below that image (subtitles). As a result, the subtitler sometimes has to surrender to the image and restrict the amount of text and infor-mation not to distract the viewer. The situation may be obviously opposite, with the action built by means of dialogues, which requires the subtitler to include in subtitles as much information as possible. There is also the underlying problem of temporal and spatial limits, which have to be taken into consideration each time and which have to comply with certain norms that in some cases may be quite restrictive.

Another dimension mentioned by Titford is closely related to the first one. The problem of coherence and cohesion is naturally connected with the technical limita-tions. The two ideas are negotiated on "a coherence-cohesion continuum," which means that in certain cases it is only one of the features that takes over the other: subtitles may be, for instance, fully coherent as discourse, being at the same time barely cohesive as a text, with abrupt sentence breaks or impolite dialogues (Hatim and Mason 2000). This is due to the constraints under which the subtitler has to operate and which make it difficult to retain the equivalence between the source and the target text.

According to Titford, the idea of equivalence is closely related to the last dimen-sion, i.e. the visual-linguistic correlation. At this point, the author mentioned two problems typical of subtitling: the situation when the word motivates the image, in other words when there is a close relation of equivalence or interpretation where the verbal message corresponds to or supports the visual one. In such a case the subtitler is restricted by the visual factor and has to take into consideration the non-verbal message. The other situation pertains to the reading speed of the viewer and conse-quently to the way the text in subtitles is delivered. The text projected below the image has to be easily processable, especially when the action changes quickly.

Having read the article, a potential subtitler may have had second thoughts about choosing the profession. Titford himself limited the discussion to three dimensions, which he considered typical of subtitling, not mentioning a number of others. Still, those three constraining dimensions seem to have had a significant influence on the way the domain of audiovisual translation was perceived for a long time. Lack of equivalence, the idea of translation loss, limited cohesion, technical difficulties: it all contributed to the fact that there used to be an ongoing debate revolving around the burning question on the genuine nature of audiovisual translation: is it an example of adaptation rather than translation, or is it a domain of an established discipline of translation with its own intricacies? There have even been attempts at trying to settle the matter somewhere in the middle with the coinage of new terms, including "trans-adaptation" (Garneau as quoted in Delisle 1986; Gambier 2003).

Over the years scholars have tried to defend the status of subtitling and generally audiovisual translation by addressing the idea of constraints by renaming them or suggesting various classifications, thus trying to underline the intrinsic need for a

certain degree of text condensation and edition. Suffice it to mention, Mayoral, Kelly *et al.* (1988), who concentrated on two sources of constraints, and namely the existence of other communication systems (apart from the linguistic ones) and the change of the medium. They applied the idea of constraint to a wider range of translation activities, including songs, comics or advertisements next to dubbing or subtitling. They even managed to arrive at a measurable idea of degrees of constraint, based on the concept of synchrony.

Gottlieb (1992), who addressed the problem of constraints in subtitling, distinguished between qualitative and quantitative ones. The former, also referred to as textual constraints, pertain to the spatiotemporal factors which limit the translator's freedom. The latter, referred to as formal constraints, result from the impact of the visual signs, which has a considerable influence on the textual quality of the end-product.

Along the same line Díaz-Cintas and Remael (2007) argue that subtitling is faced with fairly obvious limitations of space and time, but also from the ones caused by the change of the medium (speech in writing), use of images as well as the presence of the source text. They acknowledge, though, that "all forms of translation pose challenges and all translated texts are the result of reading, interpretation and choice" (Díaz-Cintas and Remael 2007: 145). Arguing that there are three conditions which actually set subtitling apart from more traditional methods of translating, Pedersen (2011) underlines the significance of time and space constraints, the polysemiotic context of the subtitled text as well as the shift from speech to writing. It seems that discussing the problem from such a perspective made constraints even more acute and problematic, for it tended to highlight their limiting nature or even used to shift audiovisual translation to the margin of translation studies.

Yet, however limiting the nature of constraints may be, they can prove a helpful device indeed, providing the translator understands their nature. As seen by Toury (1995), norms "always imply *sanctions* – actual or potential, negative as well as positive." The question may pertain to the positive aspect of sanctions or constraints, since the name "sanction" suggests something of a negative nature and elicits negative connotations. Why should constraints imposing sanctions be positive then? The answer may be found in the paper mentioned at the beginning of the article: Levý (1967) suggested that since there are fewer possibilities (due to the existence and effect of various constraints stemming from a limited number of options or due to contextual constraints), the choice becomes easier. Constraints, which if recurrent or intrinsic may give rise to norms, simply narrow down the scope of all possible solutions and consequently make the process more straightforward, which was noticed also by Hermans:

> [n]orms allow the translator who is faced with a contingent, unpredictable and potentially destabilizing input – the Source Text – to reduce the number of potential solutions for this array of translational problems by adopting only those solutions suggested by the norm as being likely to result in a Target Text that accords with a given model, and thus with a certain notion of correctness, and hence with the values and attitudes that lie behind these models and correctness notions. (Hermans 1991: 164-165)

Obviously, the negative factor is implicit in the idea of constraints, if only for the fact that they make the translator put in some extra effort on the way. However, it may be also argued that the knowledge of constraints operating in a specific case may

be a help rather than a major hindrance, since it may turn those restrictions into useful instructions. This assumption may be supported with an example of opera surtitling, a specific modality of audiovisual translation practised under a number of constraints.

3. Constraints on Opera Surtitling

The idea of translation constraints does not seem exclusive to audiovisual translation, not to mention opera surtitling. Consequently, it is not argued that surtitling is special due to the fact that it is constrained. What is the focal point of the discussion is the assumption that the knowledge of constraints operating in surtitling may prove to be of help, as far as the overall process and the shape of the end product are concerned.

Opera surtitling has been accompanying opera performances around the world since its introduction in 1983 by the Canadian Opera Company during the staging of *Elektra* by Richard Strauss. It was introduced by Lotfi Mansouri together with Gunta Dreifelds and John Leberg, who were driven by the success of subtitling. Right from the beginning, surtitling has been provoking fascinating discussions with a number of commentaries on its pros and cons appearing in the media from time to time (Holland 1992[2]; Clements 2000[3]; Holden 2005[4]; Tommasini 2008[5]; Adair 2013[6]). Despite the alleged shortcomings, opera surtitling has changed the operatic world to a considerable degree, making it more audience-friendly, accessible and varied, since it enabled directors to include less-known works in repertoires.

Since it was impossible to patent the solutions at the very beginning, the originators managed to register the brand name, i.e. SURTITLES™, which was chosen in order to acknowledge the bilingual environment in Canada (hence the prefix *sur-*) and to differentiate between the two AVT modalities location-wise (Dreifelds, personal communication[7]). As surtitling was introduced to opera houses across North America and Europe, various names appeared, including supertitles, supratitles or even overtitles (Matamala and Orero 2007) to avoid using the registered trade mark. It seems, however, that the name "opera surtitling" is in common use in Europe.

Even though opera surtitling has proven to be very useful, it may not be universal and appropriate in every context: a good example may be operetta which is hardly ever staged other than in the language of the audience. Along the same line, Low (2002) or Desblache (2009) argue that direct translation seems a better solution in the case of, for instance, summer festivals, teenage spectators or comic operas, where close contact with the audience is intended.

The subject of opera surtitling seems to have been examined from a number of varying perspectives. There has been research on surtitling as a method derived from subtitling, addressing the similarities and differences between the two modalities (Hurt and Wilder 1998; Dewolf 2001; Mateo 2007a; Mateo 2007b). A considerable number of articles have been dedicated to discussing surtitling mainly in terms of the accepted practice among professional surtitlers (Dewolf 2001; Low 2002; Mateo 2007a; Desblache 2008; Burton 2009). Written by both scholars and professionals, the articles concentrated on listing instructions as for, e.g. the appropriate number of characters or condensation and editing techniques. Even though there seems to be neither consensus nor a general style guide, it seems that the biggest

opera houses tend to follow the general idea of surtitle unobtrusiveness and integrity of the whole performance.

Some scholars have been concentrating on particular aspects of opera surtitling: the problem of operatic audiences, their expectations as well as the role of surtitlers has been addressed by Desblache (2007). Virkkunen (2004), on the other hand, discusses the problem of the most appropriate source text of surtitling, mentioning the staging and libretto as the two possibilities. More recently, studies of surtitling have expanded to investigations of technological advances and potential systems in use (Oncins 2015; Oncins, Lopes *et al*. 2013).

Opera surtitling has been also investigated from a wider perspective of opera accessibility, with articles by Matamala and Orero (2007) or Eardley-Weaver (2010; 2015), addressing the problem alongside studies on audio description or surtitling for the D/deaf and hard-of-hearing in opera. Currently, there seems to be a growing interest in the field, with probably the first book entirely dedicated to the subject of translation in opera: *Opera and Translation* edited by Adriana Şerban and Kelly Kar Yue Chan to be published soon, or the interdisciplinary project *Translating Music* led by Lucile Desblache from the University of Roehampton, Helena Julia Minors from Kingston University and Elena di Giovanni from the University of Macerata.

The problem of constraints in the process of opera surtitling is discussed *inter alia* by Low (2002) and Mateo (2007a). In his article, Low emphasizes that surtitling is a method of translation similar to subtitling, which however "involves different constraints and possibilities" (Low 2002: 97). He concentrates on three aspects constraining surtitling, namely the problem of size and time, as well as the question of surtitles being "easily digestible." Since the classification resembles the one typical of subtitling, Low provides a set of instructions which are similar to standards used in subtitling. However, he points out that in the case of surtitling the time constraint seems less acute, for music, which needs time to unfold, may allow longer exposure times, whereas the spatial constraint seems more acute, for the goal of surtitles is to convey just the gist, hence the libretto may be edited even by 50%.

Along the same line, Mateo maintains that surtitles are "constrained by technical, format and timing factors" (Mateo 2007a: 169), which naturally calls for a specific number of characters in a single line as well as well-thought exposure times and visible and legible fonts. Further on, she underlines that it is text, context and reception that have a considerable influence on the process and product of surtitling. It may be advisable to adopt this wider perspective and include those three concepts in the discussion on constraints and hence elaborate on the meaning of the concept.

As a result, surtitling may be said to be subject to global constraints resulting from the nature of the process or the overall goal of translation, which will stem from the characteristics of all three elements: text, context and reception. As a modality included in the domain of audiovisual translation, it will be additionally characterised by a number of constraints typical of this particular activity, which will basically come down to technical aspects. Moreover, it will also be subject to constraints exclusive to this modality and stemming from the fact that, to give an example, surtitling is used only during live performances.

3.1. Global Constraints on Surtitling

In order to indicate global constraints, it may be useful to examine the nature of surtitling from the prism of the process and its theoretical indications, the shape of the "ideal" surtitled text as well as its function. Arguing that a translation is a fact of the target culture, Toury emphasized that "translations always come into being within a certain cultural environment and are designed to meet certain needs of, and/or occupy certain 'slots' in it" (Toury 1995: 12). In other words, it is mainly the purpose of the translation that seems to be of considerable importance since it, as a result, determines the process and shape of the end product. Toury made it relatively clear in his tripartite division between the process, product and the translation function within the target culture (Toury 1995: 13).

According to this division, it is the prospective position and function of the translation within the system of the target culture that influences the shape of the target text, i.e. its textual and linguistic realization, or, more generally, its semiotic composition as seems true for opera surtitling, since in this particular case the idea of the final product should theoretically be understood as a larger semiotic composition of a surtitled performance rather than a surtitle list. The final realization will involve not only the verbal system of a natural language but also other non-verbal systems which contribute to the meaning of the complex.

Certain requirements of the surface realization govern in turn the choices of the person who drafts the target text, basing on the source text. It means, then, that the need for a specific composition determines both the strategy and the techniques employed in the translation process. This top-down division appears to bring to the front the idea of the translation purpose from a systemic position, therefore the discussion on constraints in the process of surtitling shall begin with indicating the prospective function of this particular activity.

Generally, surtitling was introduced in order to facilitate bilingual communication in opera. It was meant to bridge the linguistic gap between the audience and the libretto written in a language foreign to them.[8] Contrary to literary translation though, it is not the translated text that is to be the most visible element: in the case of surtitling, it is the surtitled performance that should be assessed in terms of its usability, accessibility or relevance. Therefore, unobtrusiveness on the one hand and the necessity to make the performance intelligible on the other seem both to be the intrinsic goal of surtitling, which may be considered as the overriding constraint resulting directly from the purpose of this translation activity. It means that the surtitler has to strive to produce a text which is highly informative, being at the same time discrete and almost "transparent," which in practice means clear and fairly explicit instructions to draft self-contained units, avoid elements of secondary importance, clumsy line breaks or unnecessary repetitions, etc. (Dewolf 2001; Low 2002; Desblache 2008; Burton 2009).

It follows that the text should be as relevant as possible from the point of view of the audience. Therefore, the requirement for relevance may be regarded as another constraint among those of global character. Relevance is one of the maxims of the Gricean cooperative principle[9] which guarantees the success of communication, and should not be considered as exclusive to surtitling. However, it seems that in the case of AVT, the idea of relevance may be viewed as the general prerequisite.

The constraint of relevance means that the whole process should essentially come down to the observance of the relevance principle i.e. to providing the maximum number of contextual effects and to reducing the processing effort necessary to comprehend the message to a minimum value, which means that "the principle of relevance heavily constrains the translation with regard to both what it is intended to convey and how it is expressed" (Gutt 1991: 101). As a result, it is not only the manner, i.e. the surface structure of the projected text, that is of significance, but also the amount of information the text contains. In practice, it brings the surtitler back to the genuine purpose of surtitling: being informative, with only the relevant information retained, and blended in the performance, which means that clarity and brevity are at stake in surtitling.

It may be stated, then, that the idea of redundancy seems to be of focal interest while discussing the relevance of surtitling. It may help to decide which elements are of secondary importance and may be omitted with lesser damage to the overall impression, including, for instance, single and longer repetitions, exclamations and other elements of prosodic nature, proper names and verbal elements whose meaning may be reconstructed by means of the non-verbal context, i.e. the music and spectacle. The surtitled text serves a pragmatic purpose and is not an end in itself. It seems beyond any doubt that surtitles should be written in a neat and correct manner, with the surtitler observing all the rules typical of the target language. However, the heightened or flowery style of some of libretti may be seen as an element of minor importance and accordingly, may be simplified for the sake of higher relevance. As noticed by Bogucki in his paper on subtitling, the constraint of relevance seems to be of utmost importance also in terms of justifying chosen techniques, for the relevance constraint works "as a filter, making sure that what is lost in the process is irrelevant or does not prevent the audience from appreciating the resulting product" (Bogucki 2004: 86). This can be achieved with the surtitler having in mind the purpose of surtitling, for which relevance appears to be a fundamental prerequisite.

The question of relevance will be directly related to the quality of the target language and the idea of acceptability, which means that the translation should meet certain criteria of language correctness within the target culture. Surtitling is not only a matter of following technical guidelines or concentrating on the formal aspects. The text projected on the screen should be also approved of in terms of the correct use of the target language. It will include certain matters of spelling, punctuation, inflection, unambiguous language usage or natural-sounding collocations. The problem seems especially significant when the surtitled text is drafted basing on a verbatim translation,[10] which demonstrates the lexical faithfulness and not necessarily the syntactical rules of the target language, or a singable translation with frequent cases of repetitiveness or unnaturalness, where the verbal side often falls victim to the idea of singability. Both situations are fairly common in Poland: as a result, surtitles are often commented on by the audience because of their language quality rather than their usefulness (Rędzioch-Korkuz 2015: 158). It should be underlined at this point that the translated version of the libretto does not compel the surtitler to copy the lines unless it is clearly stated by other people, a problem which will be discussed later on in the following paragraphs.

To finish the section, it may be necessary to mention the issue of translation problems. It seems that the global constraints have a considerable influence on choices

concerning the right technique or procedure, some of which appear out of the question in surtitling (for instance commentaries, footnotes or descriptive equivalents). This problem may be referred to as a metatranslational constraint, which will stem from the nature of the previously mentioned ones. It means that the surtitler seems compelled either to choose only the appropriate techniques while dealing with translation problems or to revisit the ones used in the translated libretto while drafting surtitles.

3.2. AVT- and Surtitling-Related Constraints

All of the above constraints may be regarded as basic or global ones, but the list of constraints on surtitling, even though fairly obvious, does not seem exhausted. Global constraints are accompanied by others, including the ones typical of audiovisual translation. AVT-related constraints include mainly the ideas mentioned by Titford (1982), Díaz-Cintas and Remael (2007) or Pedersen (2011). They will pertain to three domains: the temporal and spatial limitations, the average reading speed of the target audience and the semiotic composition of the source text.

Both the temporal and spatial limitations influence the length of lines and the exposure times and may be dealt with by means of employing condensation techniques. The time of display and the number of characters are values which are not determined exactly (unless the company operates according to a specific house style, but even then the values are mainly approximate (Low 2002: 103; Burton 2009: 64), which means that they may be manipulated and adjusted every time it is necessary. Subject to the principle of relevance, they are set for each performance or each surtitle block individually. The actual nature of this constraint becomes clear and visible only in the context of the performance and may be pre-managed in the course of rehearsals, which brings the discussion to other constraints that seem to be characteristic of opera surtitling.

The very typical constraint stems from the nature of opera as a form of art. Introduced as a *dramma per musica*, opera is meant to combine the word, music and spectacle. All the elements are to function within a harmonious framework of music, which creates the flow of the action. It has been said on a great many occasions that music is the performance clock: not only does it determine the onstage action, but it also signals particular parts of the performance, be it the very beginning of the story, an unexpected plot twist or the climax of the events. Naturally, the constraint of time and space has to be considered within the framework of music, which on the one hand can make it even more constraining, demanding a fixed rhythm of projecting surtitles (especially in the case of *opera buffa* with fast exchanges), but on the other hand it may contribute to relaxing this constraint by allowing longer lines or times of exposure.

In addition to music there is another similar constraint which appears characteristic of opera surtitling. The performance, which is a live event, becomes a constraining factor of great importance. Not only does music become the element that determines the actual flow of the performance, but there is also the human factor, i.e. the behaviour of singers or spectators, incidental flips or mistakes as well as the current mood of all those taking part in the performance. That calls for a surtitle operator, i.e. the person who is responsible for projecting the text and not necessarily

drafting surtitles, to be both familiarised with the operatic work, its stage adaptation or the shape of surtitles and to be alert for any unexpected events.

The constraint of a live performance emphasizes the importance of surtitle unobtrusiveness in that there is no physical possibility to stop the action, rewind the scene and consequently read the text again. Therefore, surtitle blocks have to be condensed and perfectly timed within the music framework. One glance should be enough to comprehend the message and refer it to other semiotic systems operating onstage. This feature is also conditional on another AVT-related constraint mentioned above, and namely the average reading speed of the audience and its design.

Even though there are certain numerical data pertaining to the average reading speed provided for various groups or types of texts, with the standard reading speed for subtitling calculated at the level of 15 cps, which means 160 wps (Díaz-Cintas and Remael 2007; Díaz-Cintas 2012), it seems that the audience design in opera is a problematic issue and hence it is almost unfeasible to indicate an average measure. The audience seems to be fairly heterogeneous, including representatives of the music intelligentsia, for whom surtitling may be an unnecessary sign of the times, average spectators awaiting aesthetic experiences or incidental persons who come to opera because of reasons other than the usual ones. In other words, the audience is comprised of people of varying ages, background, experience or preferences, which also means varying cognitive abilities. The surtitler, then, has to find a golden middle and make the performance accessible and usable by means of drafting appropriate surtitles. In general, it may be assumed that spectators neither want to attend an unintelligible show, nor are they willing to be forced to read lengthy lines of text projected in flashy lights for three hours.

Another issue would be the semiotic composition of the source text, which is to be made available to the target audience. Even though it is the foreign libretto which seems the most problematic element in the bilingual communication in opera, it is just one element that constitutes the whole operatic work. Surtitling is about translating an audiovisual text, i.e. a semiotic composition with a number of semiotic systems operating simultaneously through both visual and acoustic channels by means of verbal and non-verbal codes.

The polysemiotic and multimodal nature of the operatic work which is to be performed on stage restricts the freedom of the surtitler, in that s/he has to resort to all the semiotic systems, with the libretto being an intermediary text only. The actual staging will often influence the division of lines, the choice of appropriate style or even single words. Opera surtitling, similar to subtitling, is an example of an additive translation (Gottlieb 1997: 141), which means that the text does not replace the original source text: it should give clues to the storyline and help the spectator throughout the performance.

It seems, therefore, true, following the basic assumption of the AVT theory, to say that in the case of opera surtitling the audiovisual text to be translated, i.e. made accessible to the target audience, will be a specific stage interpretation of an operatic work, which may be indicative of yet another constraint. The original staging intended by the composer, librettist and the first director often serves as a blueprint, which means that a specific interpretation may not follow the intended instructions. It is common nowadays to experience interpretations which are far from the original version, with various elements typical of current times, technological advances of the

21st century or completely different dimensions of time or place of the action. Audiences are being more and more often confronted with a Carmen surrounded by a contemporary gang on motorbikes or an Onegin wearing casual clothes typical of these days. The actual staging may thus influence the shape of the surtitled text to a certain degree. A choice of slightly different props, costumes, sets or movements may call for respective changes in the text, which may be illustrated by the necessity to use contemporary language with no archaisms, different expressions of deictic function or other lexical changes. Therefore, it may be assumed that the actual interpretation of the operatic opus, and here it refers mainly to the libretto, works as a constraint which may sometimes indicate the only correct solutions.

At this point it is also worth mentioning that the interpretation of the work tends to change with time, which means that the process of surtitling seems never finished unless the performance is no longer in the season guide. It may evolve, depending on the instructions mainly from persons working on its artistic shape. It may, however, often be the case that it is a person not directly related to the production process who determines certain aspects of the performance. This seems fairly common, for instance, in some of the opera companies in Poland, where it is the artistic director who makes crucial decisions concerning the final composition. It pertains to surtitling as well: it seems common in Poland for the opera management to set the standard of the surtitled text that should correspond to the libretto translation, which in practice means that the surtitling process comes down to dividing the text into particular surtitle blocks, cueing it and then projecting (Rędzioch-Korkuz 2013: 51). In such a case the surtitler's choices are strongly restricted by goals or intentions of persons responsible for the production both directly and indirectly. Therefore, another constraint may be constituted by individual goals of authors of the current staging, including the director, conductor, choreographer, costume maker or producer.

Another constraint exclusive to opera surtitling relates to certain limitations of the technical solution used in order to project the text. In the past the main issue was the limited number of slides, which seemed problematic in the case of longer acts, requiring the surtitler to condense the text to fit it into a certain number of slides (Mateo 2007a: 171). Nowadays, it seems that the introduction of computerized software has made it easier to draft surtitles, which is obviously true: it is easier to use any number of slides, introduce any changes or align the lines according to needs. Obviously, not every solution is as useful: in certain cases, it is impossible to align the spacing (which seems especially problematic in the case of capital letters with diacritic marks), the size and font of characters or their colour. It all influences the legibility of the text, which should be taken into consideration as well. Obviously, the choice of a particular surtitling system in use (an LCD or LED screen, a video projector, specialist software accompanied by the electronic libretto system, etc.) is beyond the surtitler's control. However, it is the surtitler who may manipulate the text to make it as legible as possible (by for instance, using a synonymous word which has no diacritic marks or takes up less space).

Similarly, there is also another problem which is most often outside the surtitler's control and which very often affects the legibility, and thus the actual usability, of the surtitled text. It is worth remembering that opera houses are usually situated in venues that are of a considerable size and grandeur: some of the buildings were very often built several decades ago and the visibility of a certain point may not be the

same for each spectator. As a result, the experience of reading or the cognitive effort necessary to understand the surtitled text is not the same for every spectator not only due to individual abilities or types of vision impairment but also owing to the spatial arrangements of the seats in the auditorium. Varied fields of view or limited visibility of the stage may contribute to the general impression as regards surtitling, which may indicate that the architecture of the auditorium may work as a constraining factor the surtitler should be aware of.

4. Case Study: Surtitling *Madama Butterfly*

This discussion may be supported with examples taken from the surtitle list drafted for Puccini's *Madama Butterfly* staged at the Polish National Opera in Warsaw. The surtitles were based on a full prose version which appeared in the printed program as well. The translation was provided by a professional translator who cooperates with the company on a regular basis, therefore the translation may be assumed to be good in terms of quality or the accepted practice and is not discussed here. The surtitles were drafted by one of the stage managers working in the company and responsible for the staging of the opus, which seems a common practice in Polish opera companies. In this case, the stage manager has no formal translation or linguistic background.

The surtitles may seem fairly wordy at points, since generally, the degree of correspondence between the libretto translation and surtitles is fairly high; however, the surtitler decided to introduce certain modifications (mainly by omitting specific lines). It seems that at certain points the surtitles seem rather problematic, which may be due to a number of factors, including wrong spelling, text distribution or lexical issues. Basing on that, it can be assumed that the surtitler did not seem to work within the constraints and hence, the observable pitfalls could have been avoided but for the knowledge or consideration of the constraints operating in the process of surtitling.

One of the problems of the surtitles is visible when the surtitler seems to have missed the idea of global constraints, including unobtrusiveness and optimal relevance, as well as AVT-related constraints, which may be exemplified with the following lines:

(1) *Więc żenię się, japońskim zwyczajem, na okres dziewięciuset*
     so I'm getting married, according to the Japanese tradition, for nine hundred[11]

     dziewięćdziesięciu dziewięciu lat.
     and ninety-nine years.

(2) *Z prawem comiesięcznego rozwiązania umowy.*
     With the right to terminate the agreement every month.

     – To wygodna filozofia.
     – A comfortable way of living.

(3) *Za pańską rodzinę w Ameryce.*
     To your family in America

     – Za dzień, w którym poślubię prawdziwą amerykankę.
     To the day I marry a real American woman.

(4) *Przybyłam do wrót, za którymi*
I have come to the gate, behind which

jest szczęście
there is happiness

(5) *dla tych, co żyją i dla tych,*
for those who live and for those

co umierają…
who die…

(6) *Nim przekroczysz próg, odwróć się i spójrz*
Before you step in, turn back and look

na to, co ci jest drogie.
at all that is dear to you.

(7) *Chusteczki… fajka… pasek… mała zapinka…*
handkerchieves… a pipe… a belt… a small pin…

lusterko. Wachlarz.
a pocket mirror. A fan.

(8) *Kami sarundasico!*
Kami sarundasico!

Wyrzekamy się ciebie!
We don't want you!

(9) *Izaghi, izanami, sarundasico i Kami… Moja głowa!*
Izaghi, izanami, sarundasico and Kami… My head!

Sprawcie, niech Butterfly już więcej nie płacze.
Make Butterfly cry no longer.

Examples 1 and 2 show several problems: the lines are relatively long and the text which makes a logical semantic block is split between two screens. Additionally, the relevance of the first screen seems questionable if only for the use of the numeral which is unnecessarily written out. In most cases, the lines have less than forty characters, although at certain points they are much longer, even reaching seventy characters, with multiple complex sentences (Examples 4-6). Even if music allows for longer lines, it seems rather against the principle of relevance, especially if we consider the fact that the surtitles could have been easily edited into shorter lines.

Example 3 contains a spelling mistake, with the name of the nationality spelt with a small letter. In Example 7, the main problem is the use of ellipses, which seems unjustified also in terms of punctuation rules for the Polish language. Spelling and punctuation mistakes tend to be repeated in the surtitle list, which may influence the reception of the whole performance in a rather negative way.

Examples 8 and 9 show another recurring problem: the translator of the libretto decided to transfer foreign words and expressions directly from the source text. It seems that in the case of an average spectator, such lines, although emphasizing the Far Eastern character of the work, seem barely comprehensible and hence redundant. The surtitler should have reconsidered using the technique of direct transfer of the Japanese-based expressions.

Other problems were related to constraints typical of surtitling: it is hardly possible to demonstrate the problem here, but there were issues related to synchronisation

and exposure times. On several occasions, a particular surtitle block stayed longer even after the singer stopped singing or it appeared too late, which may have caused misunderstanding. This may have been due to the wrong marking on the piano score, which did not match the music. Another aspect was the dichotomy between the image and the text, which can be illustrated by Example 10:

(10)   – *Jesteś tylko moja. Oczy pełne czaru.*
     You are only mine. Eyes full of charm,

     I ten ciemny warkocz na twoich ramionach.
     And that dark-haired plait on your arms.

Pinkerton addresses Butterfly by certain features of her appearance, which she, however, lacks in this particular stage interpretation. It included a very limited number of props, specific costumes, sets and choreography, which would also give rise to a number of discrepancies in terms of deictic expressions or language dynamics retained in the surtitles but not matching the stage events.

Even from just a few examples it may become clear that the surtitles for *Madama Butterfly* need improvement, since they fail to follow common rules or standards. This may be of no surprise, because it is hardly possible to indicate any general rules regarding surtitling in Poland. It is done by a number of persons, even within one company, which means a number of personal attitudes. Consequently, surtitling appears to be done rather casually and seems to be based on a certain amount of intuitive behavior (Rędzioch-Korkuz 2013, 2015).

It follows, then, that it is not rules that may be helpful in this case but rather constraints. Constraints appear to be of a fairly universal character, because they will operate every time in every case of surtitling. Whereas it may be difficult to indicate absolute rules or data as for the appropriate number of characters or exposure times, it is true that the constraining character of music, relevance or the audience design will always be present, and with slightly different implications depending on a specific situation. Thus, constraints may guarantee that surtitling is tailor-made and appropriate. Acting in a twofold manner, they serve as ready-made instructions, indicating the most important aspects the surtitler has to pay attention to and which, as indicated above with, e.g. spelling mistakes, may be obvious but still tend to be overlooked. On the other hand, constraints "make the decision" for the surtitler, since they eliminate certain options, leaving only the relevant and feasible ones.

Understood in this fashion, constraints will function as aspects that have to be considered individually for each performance, working as a shortcut towards the intended goal. It seems that it is easier to operate under certain formal and universal restrictions, which indicate what to do and what not to do, rather than to exercise rules which may be actually non-existent, not absolute or which may lack general agreement. In this particular case, the surtitler may not have a sufficient knowledge of translation studies or AVT theory. However, it may be argued that had he observed the formal constraints under which to operate, he might have avoided certain problems, since the relevant constraints have their sources in external and observable conditions, which should be known to anyone working with opera.

5. Constraints in the Process of Surtitling: Conclusions

Toury holds that translation, functioning in the intended socio-cultural context, "can be described as subject to constraints of several types and varying degrees" (Toury 1995: 54). All things considered, it seems feasible to indicate the following constraints operating in the process of surtitling:

– the constraint of the general purpose
– the constraint of relevance, including the problem of acceptance
– metatranslational constraints
– AVT-related constraints, including spatial and temporal limitations as well as the requirement for textual condensation, the nature of the audiovisual text and the audience design
– the constraint of music
– the constraint of a live event
– the constraint of the interpretation of the operatic work
– the constraint of intention of persons responsible for the staging
– the technical constraints of the surtitling system
– the constraint of the architecture of the auditorium.

The first three constraints are of a rather global nature, in that they may be observed in other instances of translation. However, they function within different dimensions with every single example of translation. The most significant seems the constraint of the surtitling purpose and the requirement for relevance, for they determine choices within the acceptance or metatranslational constraints, limiting the number of possible solutions at the very beginning of the translation process, since they indicate both the strategy and techniques to be applied.

Another group of constraints pertains to the nature of audiovisual translation, with three main issues: the quantitative limits, the semiotic composition of the audiovisual text as well as the profile of the target audience and their cognitive abilities. All the constraining factors influence the number of possibilities further on, indicating at the same time techniques typical of audiovisual translation (the recommended number of characters per line, cueing practices, ways of dividing the lines or forming semantic blocks, etc.)

It seems that the greatest number of the constraints discussed above is related to opera surtitling as an individual and fairly special case of audiovisual translation. The focal point appears to be the operatic performance, as it is a one-off event during which a specific interpretation of an operatic work is presented along with the omnipresence of music that imposes specific restrictions on the surtitler. What is more, there are also other aspects which influence the decision process, including the variable interpretation of persons responsible for a given production, and last but not least, certain technical issues, including the design of the surtitling software or the opera building.

All in all, it may be stated that all of the constraints operate at the same time and may often overlap one another in their scope, in that they call for similar techniques, which should be based on specific criteria of assessment, including the relevance of the surtitled performance, its accessibility and usability for the target audience or the unobtrusiveness, readability, legibility and acceptance of the surtitled text. It all seems to come down to making a staging available to the target audience by presenting them with intelligible clues to the libretto that exists in the context of this particular interpretation. In practice, it will most often mean following certain guidelines

and probably making a number of arbitrary decisions which should be based on common sense and a sense of relevance.

It may be argued, then, that the awareness of the existence of potential constraints in the surtitling process seems to be of utmost importance, for it helps to understand and exercise the general purpose of surtitling, by justifying the rationale behind this AVT modality. Following the tripartite division put forward by Toury (1995), it may be stated that the surtitler, having understood the function and the role of surtitling, can gain control of the surtitling process, choosing the right techniques and arriving at the end product which will be both linguistically acceptable and adequate in terms of its goal. In addition, the knowledge of constraints may help to justify all the choices and to account for the unavoidable translation loss.

Therefore, constraints in the process of surtitling, contrary to the common interpretation of the name, may serve as useful and helpful guidelines rather than as hindrances curbing the surtitler's freedom. They do function as limiting factors, but this can be positive in that it makes the decision process clearer and more straightforward by removing all the possibilities that would be unacceptable or simply unfeasible in the case of surtitling.

It may be concluded that it is crucial to acknowledge the fact that surtitling is constrained to a certain degree, a degree that is potentially higher than in the case of usual interlingual translation. But that does not mean that surtitling can be neglected, both professionally or academically, or be devoid of any standards. Knowing the constraints and accepting them as a matter of fact seem to be key elements in the process of surtitling: only in this way can the surtitler see the rationale behind this particular method, follow the intended goal and produce an end product that will comply with theoretical assumptions.

Without doubt, it is not only the professional surtitler who should adopt this approach: it appears to be significant for persons working on a particular operatic work to understand the real nature of surtitling and to follow the same path towards the final product. Not only does surtitling function as an addition of pragmatic importance but also as an element of a complex semiotic amalgam with a specific aesthetic value. The whole process of surtitling should be subject to a clearly stated goal shared by all persons working on a given staging. It seems that only in this way can surtitling be effective and successful.

NOTES

1. *The Merriam-Webster Dictionary of English* (Online Edition). Visited on 15 September 2015, <http://www.merriam-webster.com/dictionary/constraint>.
2. HOLLAND, Bernard (22 Auguest 1992): Surtitles in Opera: Hindrance or Help? *The New York Times*. 1:11. Visited on 25 February 2016, <https://www.nytimes.com/1992/08/22/arts/critic-s-notebook-surtitles-in-opera-hindrance-or-help.html>.
3. CLEMENTS, Andrew (23 September 2000): Incomprehensible. *The Guardian*. Visited on 25 February 2016, <https://www.theguardian.com/books/2000/sep/23/books>.
4. HOLDEN, Anthony (12 June 2005): Surtitles at last – I knew I was right. *The Guardian*. Visited on 25 February 2016, <https://www.theguardian.com/music/2005/jun/12/classicalmusicandopera1>.
5. TOMMASINI, Anthony (6 July 2008): So That's What the Fat Lady Sang. *The New York Times*. Visited on 25 February 2016, <https://www.nytimes.com/2008/07/06/arts/music/06tomm.html>.
6. ADAIR, Marcia (19 May 2013): Surtitles, once denounced, loom large in modern-day opera. *The Los Angeles Times*. Visited on 25 February 2016, <http://www.latimes.com/entertainment/arts/culture/la-ca-cm-supertitles-opera-20130519-story.html>.

7.   DREIFELDS, Gunta (2012): personal communication, online.
8.   Initially, opera surtitling was used in the interlingual fashion, but after about fifteen years the Canadian Opera Company opted for the intralingual version. Currently, both intralingual and interlingual surtitles are used by a number of opera companies, which means that the problem of poor enunciation may be solved relatively easily.
9.   The idea of the cooperative principle put forward by Grice (1975) is related to the observance of four maxims, which guarantees the establishment of the principle and theoretically, the success of the communication. There are four maxims, namely the maxims of manner, quality, quantity and relevance. There may be cases when the maxims are not observed or are flouted, which may frequently lead to the so-called implicatures. For more insights see Grice (1975).
10. The idea of verbatim translation is understood here as any instance of interlingual translation strongly focused on the source text, including a word-to-word, literal or faithful translation.
11. The translation of the examples is provided by the author.

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