

Why Cultural Contexts Are Missing: A Rhetorical Critique of Localization Practices

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This paper argues for the importance of cultural contexts in localization practices. It explores possible reasons for the missing of cultural contexts in localization, such as a static model of culture, a positivist view of science, and an instrumental engineering approach. Broad-scoped rhetorical methods are called to improve the performance of localization.

International technical communication and its branch, localization, are gaining more attention these days. Many people have been studying ways of how to address the international audience effectively. However, current localization practices have not been very successful yet. Practices are usually carried out with a narrow scope or on a surface level. Professionals focus their attention on the delivery aspects known as “do and not to do” such as what colors won’t work for an audience in a specific country and what page layout would be preferred by some ethnic culture.

This paper is trying to explore reasons why we haven’t made our anticipated progress from a rhetorical perspective. It suggests that the missing of cultural contexts has become a big problem in this area. Some factors related to cultural contexts bear our further investigation: the static model of culture, the positivist view of science, and the engineering approach favoring efficiency over context-sensitivity. These factors lead to potential risks in localization practices: a separation of content and delivery in final products and an exclusion of ethics in the localization process. This paper argues that localization is more than adjustment of an existing information product on the surface level. It should be part of the invention process. Cultural contexts should be seriously considered in localization practices to accommodate a wide range of audiences.

LOCALIZATION AND CULTURE

The success of localization is closely related to the relationship of localization and culture.

According to Gribbons, localization is the act of modifying an information product to make it usable and conform to the target markets (1997). The localization process is carried out on two sub-levels: i) adjusting the features of the product including translation, punctuation, dates, weights, measurements, addresses, currency, and so on to mirror the conventions and needs of the target audience on the *surface level*; ii) adjusting the aesthetic appeal, images, colors, logic, functionality

and communication patterns to conform to the target audience on the *cultural level*.

Here cultural factors play an important role in determining the acceptability and usability of an information product. First, the communication itself occurs in and results from specific cultures. Second, communication is one part of culture itself. We can’t distill cultural factors out of communication; especially in the case discussed here, we can’t distill cultural factors out of the localization process. Third, information products are always situated in cultural contexts, where they are designed, produced, tested, distributed, and consumed.

Cultural factors are behind local communication conventions (e.g. translation, punctuation, dates, etc.) and aesthetic appeal. They include common knowledge shared within a culture, the hierarchical structure of society and workplace, culturally specific rhetorical strategies, cultural differences in processing information, and so on. If we borrow the iceberg model from Hoft (1995) to look at local culture, we will find that translation, punctuation, and aesthetic appeal, are the tip of the iceberg; the huge body of the iceberg is the culture itself, e.g. common knowledge and values shared within a culture.

One important note that should be added to this iceberg model is that the iceberg doesn’t stay in the water (its outside world, more specifically, global culture) statically, but is growing itself and interacting with surrounding waters dynamically. The inside of the iceberg constantly changes as time goes. Moreover, some part of the iceberg might be melting while interacting with its surrounding waters. In the age of globalization, culture is a dynamic process in which cultural meanings, objects, and identities flow across institutions, nations, and generations (Marcus, 1995). Local culture is concretely an open-ended, back-and-forth dialogue of insiders and outsiders, of the local and the global, of diverse factions. It is hard to separate local culture from global culture. Both local cultures and global cultures are so closely intertwined that the former is actually one part of the latter.

THE MISSING OF CULTURAL CONTEXTS

Many unsuccessful stories in localization are due to the missing of cultural contexts and insufficient scope.

A Static Model of Culture

It is unfair to say that localization professionals ignore cultural issues in their practices. They do know a lot do's or taboos for different ethnic cultures. They have a lot of localization guides in translation, layout, fonts, graphics, and so on. They also have a rich repertoire of anecdotes from many different cultures. However, even with such intensive efforts on details, stories of intercultural communication blunders are heard from time to time. How do these come? For most part, it is just these intensive efforts on cultural details that result in miscommunication blunders. No guides in the world could cover the nuances and dynamics of an ever-changing culture. The cultural details localization professionals work with and the cultural information stored in their knowledge base can only represent the cultural conventions, some superficial phenomena of a specific culture, and the tip of the huge iceberg. All these suggest a static model of culture behind communication practices.

This model regards cultures as something unchanging and congruent. It neglects the dynamics between different subculture groups that are arguing different perspectives and struggling for ascendancy. In most cases, this model only sees a dominant culture in one area and assumes that it will be dominant forever. People who believe this model of culture would like to use conventional cultural symbols to represent local cultures.

One example is the study done by Barber and Badre (1998). They developed a set of "cultural markers" in website localization which they think signify a cultural affiliation and can represent the conventions of local cultures. Their cultural markers include national symbols, colors, spatial organizations, etc. They recommend incorporating these quick-and-dirty cultural markers in Web pages to increase Web usability and acceptability. In their opinions, the changing local culture can be translated into, or more accurately, reduced to a set of cultural markers. However, they mistook a situation of "becoming" as that of "being" here. According to Whitburn (2000, p.15), Plato's "being" and "becoming" can be used to distinguish two kinds of rhetorical situations: "being" represents the unchanging and eternal reality while "becoming" refers to the changing multiplicities of the world. In this case, Barber and Bader didn't realize that localization is a complex process that embodies the changing multiplicities and various ranges of actions. It is a rhetorical situation of "becoming", not "being."

Another example comes from the recently published textbook *Global Contexts: Case Studies in International Technical Communication* (Bosley, 2001). Dragga (p.16) uses his understanding of Confucian goodness, wisdom, righteousness, and trustworthiness to interpret a miscommunication case between a Chinese official and

an American technical writer. His descriptions of Chinese personalities are sound; however, as a Chinese student, I can see how strained his arguments are. The problem is that he uses outdated cultural knowledge to evaluate a current case. Though Confucian thoughts still influence Chinese people's thinking, they are not dominant views any more, especially after the era of the Cultural Revolution (1966-1976). Thus his analysis based on Confucian thoughts is not persuasive. Here some "being" knowledge is used again to interpret a "becoming" situation. The static view of culture weakens arguments.

The static model of culture can be traced to the exploration of universal truths in the Western philosophical tradition starting from Plato and Aristotle. Whitburn claims that there were two trends of rhetoric in ancient Greece and Rome, more specifically, between Isocrates and Plato and his student Aristotle. Isocrates thinks ethical conduct and usefulness are two important goals of rhetoric. He focused on teaching people how to make wise judgments on "what we should do and what we should say" (Bizzell et al, 1991, p.51). He believes that only judgment and not exact knowledge is possible in deliberation about human affairs. On the contrary, Plato values exact knowledge and is not interested in human affairs. Platonic philosophy ranks the quest for truth higher than the quest for utility. Later, Aristotle systemized thoughts of rhetoric. His philosophy, "a study to determine truths about what exists, became the ultimate in education" (Whitburn, p.28). Influenced by Plato and Aristotle, people value exact knowledge more than judgment and tend to seek universal truth in almost every case.

For localization professionals who share Plato's worldview, they believe that there are some general principles about culture and localization they can derive from brute facts. They would like to reduce the rich and complex cultural data into some universal cultural paradigms or patterns. However, the universal truth doesn't work in every case, as what we just discussed above. The rhetorical situation in localization work is a "becoming" situation that involves complex human affairs. As Isocrates suggests, it is conjecture not exact knowledge that should be applied to the "becoming" situation. By thinking of local cultures in a static way, localization practitioners are misapplying a method of "being" to a "becoming" situation.

A Positivist View of Science

Closely related to the static model of culture, a positivist view of science combined with an instrumental engineering approach is employed in localization practices.

The positivist view of science gained its ascendancy in academia in the first half of the last century. Though it is not popular any more, its legacy still influences our

thinking in many areas. Miller (1979) suggests positivism values systematic data and law-like generalizations. This view of science “presupposes a mechanistic and materialistic reality” (p.612). She pointed out that the positivist view of science is haunting the field of technical communication. Twenty years later, we still find similar traces in localization practices. In the example of cultural markers, researchers define culture in this way: “a means of distinguishing among the different countries and their respective web-sites.” There is no context in this case. Culture is not a dynamic process or an open-ended dialogue but some qualities or means. The research method is also problematic. To produce a set of cultural markers, researchers inspected hundreds of websites worldwide and concluded that they had identified a detailed list of cultural markers. However, can those hundreds of websites represent the diverse cultures in the world? Can cultural markers represent culture itself? Do there exist some cultural formulas?

When living facts of culture are reduced to dry specimens in localization practices, the rich contextual data are inevitably stripped away. What remains are some thick handbooks such as how to develop international software and some quick-and-easy references such as what colors might not be appropriate to a Japanese audience.

These guides do help produce localized information products by providing detailed suggestions; however, could these guides always lead to good quality work? For example, it is helpful for an Asian localization engineer to know that the color red should generally be avoided when communicating with American audience because red color has a meaning of danger and stop in American culture. Avoidance here can eliminate a communication blunder. But the question is: does he need to avoid the color red forever when communicating to the American audience? Actually the color red is a good eye-catcher. It sometimes does improve communication in some situations; some American corporate Websites (www.amazon.com, www.lucnet.com and www.aprisma.com) use the color red very effectively. So what should he do? Follow the guide or do his own research?

An engineering approach favoring efficiency over context-sensitivity is another feature of current localization literature. A quick survey of some popular localization guides and primers (Esselink, 2000; Kano, 1995; Lingo et al, 2000; LISA, 2000) shows that, in localization engineers’ eyes, the process of localization is a variation of software engineering. The process is interpreted as an engineering cycle from the planning stage to the testing stage. It is a big improvement that we have a workable process to automate the complex workflow; however, this engineering cycle is detached from its context. Most technical components are covered in detail while it is hard to find serious considerations on

content, context or audience. Books and guides usually elaborate thoroughly on coding, interfaces, fonts, formats, and so on, but pay little attention to culture and audience.

Unfortunately the narrow scope and the missing of context do not seem to bother most localization professionals. Lots of efforts in this field are devoted to developing systematic and quantifiable methods to help “improve” localization practices. Popular topics in the localization literature usually are those tackling the technical side of the localization practices, such as techniques and software packages for text or graphics translation.

POTENTIAL RISKS TO PRODUCT QUALITY

The static model of culture and the positivist view of science along with an instrumental engineering approach cause many potential risks to the quality of international information products.

Separation of Content and Delivery

The goal of technical communication— problem-solving or invention— is compromised and ignored in these kinds of practices. The misapplication of “being” methods to “becoming” situations, the narrowness of scope, and the pursuit of cultural formulas will reduce localization practices to an exploration of styles in final products. The study of living cultures and the context is not important; there are always some quick-and-dirty culture references there, and systematic and scientific methods can solve everything. As Miller states “[t]he collapse of the invention as a rhetorical canon is complementary to the rise of empirical science” (p.614). In a pursuit of engineering and automating the whole process without a careful consideration of cultural contexts, the subject matter is excluded from the localization process and delivery is separated from content in final products. What localization professionals need to tend to is just delivery and style.

Thus in some software companies, localization is a separate division from the documentation division. People think the working flow should start from the documentation department. After content is developed, localization engineers are called to design a local style for the content and repurpose the content in the local format. Most companies don’t even have in-house localization professionals. They would send the localization job to the outside localization agencies. These agencies usually have no say about the content. Moreover, the in-house localization division or the outside localization agencies are usually developed from the old translation division or previous translation agencies. Because of this, professionals have the

tendency to regard the localization process primarily as a translation process, a process only dealing with delivery.

On the research side, current localization literature focuses on mechanics such as voice, grammatical structure, and reading sequence. Only a few papers go further to explore the context and ask why a specific culture has a specific style. Bosley and his contributors make some attempts to bring context issues into the international technical communication field; however, some articles in that book still devote their efforts to the mechanics of localization, e.g., how to work with articles and pronouns. Articles and pronouns might not be a minor issue here, but the danger is falling back on “tips” of international communication by focusing on styles only. More attention should go to the context and content itself. A style stripped of cultural background is just Ramian style. The failure to attend deeper cultural issues in the localization process will eventually marginalize the whole process.

Exclusion of Ethics and Western Worldview

The limitation of localization to discover the available means in formats excludes ethics from the whole process.

Ethics consideration is part of the invention process in ancient Greek rhetoric. Sanders indicates that both the traditional and the postmodern rhetorical approaches direct ethics in technical communication to “analyzing the process that inform the community that gives rise to the need for the communication” (1997, p.107). When invention is taken away from localization practices and when cultural experts have no say to the content of the localized information products, ethics is excluded from localization practices.

Moreover, few people realize that every localization process is actually developed based on a set of underlying assumptions about the world and culture. Localization can be regarded as a multiple production of culture in which different ideologies come into play and compete for the ascendancy. Localization professionals’ own worldviews and corporate ideology shape information products distributed in the global market.

Unfortunately few papers discuss ethics involved in localization practices. I am sad to see that the country of South Africa was presented as a European country in several software companies’ local websites. I don’t think this is just a communication blunder. It seems that residues of colonization still exist: to some companies, no matter how far away South Africa is from the European Continent, it is a European country since it was once colonized by the Europeans.

SUGGESTED AGENDA

Nowadays, more and more people have realized what an important role technical communicators play throughout the process of software development. Technical communicators’ participation from the starting stage of the project brings better quality to the final product and reduces the cost. As one branch of technical communication, localization has no reason to stand away from the whole process till the last stage. It is time for us to think of incorporating localization in the whole process of software development.

Localization is more than adjustment of an existing information product on the surface level. It should be part of the consideration for the invention. It should be introduced at the project planning stage along with the documentation process. A fully encompassing localization process should explore not only the best way of presentation but the most appropriate content in a specific context as well. The delivery should never be separated from the content, and the content should never be separated from its situated context.

To fix problems in current localization practices, we should use broader-scoped rhetorical methods to think of the design process and develop fully encompassing heuristics for localization.

The judgment recommended by Isocrates is called to improve the localization performance. Isocrates believed that judgment is the only possible way to deliberate on human affairs and that “[wise] man ... is able by his powers of conjecture to arrive generally at the best course” (as quoted from Whitburn, p.10). Localization process is a complex process that involves the changing multiplicities and various ranges of human actions. To address human needs, a rhetorical approach seeking a wise judgment in a changing context is more applicable than the positivist view of science. Localization heuristics should be developed to guide the whole process. Heuristics are used by Greek rhetoricians to “discover” what to say in speeches and reach fair judgments. They are procedures, criteria, or principles that help people work toward a discovery, a decision, or a solution. “They increase the chance that the solution chosen is the best possible solution among other solutions possible” (van der Geest and Spyridakis, 2000, p.301). A set of well thought-out heuristic based on the thorough context analysis and dynamic model of culture will help reach a wise decision before a welter of conflict goals.

A consideration of ethics is important in the development of localization heuristics. The great-nation chauvinism should be driven away. A worldview that respects every nation, no matter small or big, weak or powerful should be advocated in localization practices. Powerful ethics will help enable localization

professionals to allocate priorities in a complex situation.

ENDING NOTES

A successful localization process calls for a fully encompassing scope of rhetorical method. Only with a deliberative judgment considering the subject matter, the context, the underlying culture, and the ethics, will we be able to produce effective information products in the localization process.

ACKNOWLEDGEMENTS

I am very grateful to suggestions and comments from Dr. William Hart-Davidson and Dr. Merrill Whitburn while I was writing and revising this paper.

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