A Rhetorical Perspective on Localization and International Outsourcing

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INTRODUCTION

Globalization is increasingly integrating the economies and the societies of the world. Now, products created in one nation are often marketed to a wide range of international consumers. Similarly, the rapid diffusion of online media has led to an increase in cross-border interactions on both a social and a professional level. Differing cultural expectations, however, can result in miscommunications within this new paradigm of global discourse. Individuals working within this international framework therefore need to understand the process of localization in order to operate more effectively under such a global paradigm. This paper overviews localization, why it is important, and how it might affect professional activities in the future.

BACKGROUND

To understand localization, one must first understand how rhetoric, or the way in which information is presented, can vary along cultural lines. The idea works as follows: Each culture has its own set of rhetorical expectations, or conditions, for how to convey ideas effectively (Kaplan, 2001; Woolever, 2001). If one presents information in a way that meets the rhetorical expectations of a particular group, then group members will be more inclined to consider that information credible and usable (Bliss, 2001). If one presents information in a way that fails to address a group’s rhetorical expectations or that conflicts with those expectations, then the group will view that information as noncredible and will be less inclined to use it. Moreover, if noncredible messages are associated with a particular product, audiences might consider that item as not worth purchasing or using (Ulijn & Strother, 1995).

Just as cultures have different rhetorical expectations, information considered credible and effective by one cultural group might be deemed suspect or unusable by another (Kaplan, 2001; Ulijn & St.Amant, 2000; Woolever, 2001). Language is perhaps the most obvious factor related to credibility in cross-cultural exchanges. If one wishes to develop informative materials for another culture, then concepts must be presented in the language used by that group. That is, if one wishes to target information for an audience in France, one should use the French language when presenting ideas.

Using the correct language, however, is often not enough, for cultural groups can have different norms for how ideas should be expressed within a language (Bliss, 2001; Driskill, 1996; Kaplan, 2001; Ulijn, 1996). These expectations, moreover, often reflect deep-seated cultural values or societal rules (Ferraro, 2002; Neuliep, 2000). As a result, it can often be difficult for the members of one culture to anticipate the rhetorical expectations another cultural group associates with a credible presentation.

Some cultures, for example, tend to prefer more linear/focused presentations in which facts, connections between ideas, and conclusions are explicitly stated (Campbell, 1998; Ulijn & St.Amant, 2000). Other cultures, however, might prefer more indirect and seemingly circular presentations in which individuals seem to go off on tangents, insert seemingly “random” historical examples, or avoid directly stating facts or conclusions (Campbell, 1998; Ulijn & St.Amant, 2000; Woolever, 2001). These variations can lead to misperceptions or confusion when different cultural groups interact. Ulijn and St.Amant (2000), for example, note that many Western cultures prefer a more direct presentation of information, while many Eastern cultures use a more indirect approach when sharing ideas. As a result, the indirect style used by Eastern cultures is often viewed as “shifty” by Westerners who expect presenters to “get to the point.” (In such cultures, a lack of directness equals “dishonesty.”) Conversely, many Easterners tend to view the direct presentation style of Western cultures as “rude,” for by directly stating information, an individual is patronizing or talking down to the audience. In such cases, by failing to address the rhetorical expectations of the “other” culture, individuals unknowingly undermine their own credibility in cross-cultural exchanges.

Another interesting factor is that cultural rhetorical expectations are not restricted to verbal presentations. Rather, they also affect how different groups perceive and respond to visual displays. As a result, the physical appearance of an object, can differ from country to country. For example, the cultural expectations of what features an item—or visual representations of an item—should
possess can differ from country to country. Such differences can affect how audiences perceive the credibility and the acceptability of visual displays (Kamath, 2000; Lustig & Koester, 1999; Neuliep, 2000).

For example, the perception of a mailbox being a metal or wooden box that sits atop of a post and that has a red flag on the side of it is, essentially, an American one (Gillette, 1999). In other cultures, a mailbox might be a small door in a wall or even a cylindrical metal container that resembles an American fire hydrant. These design discrepancies could then cause confusion when using images to share information across cultures. Consider the following situation: International users come to a Web portal and expect to find a “mail” function. To address this expectation, the portal’s creators have included an “access mail” icon into the portal’s design. The image used for this icon, however, is an American-style mailbox. Unfortunately, this choice of image renders that depiction unrecognizable to users from different cultures—cultures in which mailboxes have very different characteristics. Those individuals might then consider the associated Web portal noncredible, for they perceive it as lacking a key design feature expected of credible Web portals. In this way, cultural differences in visual expectations can affect entire sites that use a particular kind of image.

Moreover, the presence or absence of a single design aspect or feature can be enough to affect the credibility of an image or of an overall Web site. In some cases, cultures can associate different meanings with the same color (Conway & Morrison, 1999; Ferraro, 2002). These associations could thus affect how individuals from different cultures perceive the meaning of a particular image. In the United States, for example, a blue ribbon usually indicates a winner (first place), whereas the same color ribbon in the United Kingdom often indicates second place (in the United Kingdom, a red ribbon is used to signify “first place/winner”). The different associations related to the color blue could affect how Americans vs. Brits perceive a “blue ribbon product” (first rate vs. second rate). In terms of Web design, one might consider how the blue ribbon image associate with the Electronic Frontier Foundation’s (EFF) Blue Ribbon Campaign for Free Speech Online—an icon proudly displayed by many U.S. Web sites—could affect U.K. users’ perceptions of the quality of information found on such sites (second-rate information).

The various expectations cultures can have for visual and verbal communication can markedly affect the success of cross-cultural exchanges. For these reasons, individuals can greatly benefit from practices that address cultural rhetorical differences on both a verbal and a visual level. Localization is a process dedicated to addressing such differences by revising or developing materials in a way that meets the communication expectations of different cultures.

### MAIN THRUST OF THIS ARTICLE

Localization is a process in which professionals design or revise materials to meet the rhetorical expectations of a particular cultural group (Esselink, 2000; Yunker, 2003). Often abbreviated as L10N (for the 10 letters between the “L” and the “N” in “localization”), localization generally involves one of two processes. In both cases, a company or organization wishes to share information with different cultural audiences. The time at which such international sharing takes place, however, affects the tasks of the localizer and the overall process.

In the first scenario, the localization process begins with the creation of original source materials, which are items designed for audiences from a particular cultural group (Esselink, 2000; Yunker, 2003). In such cases, an organization initially creates a product for a particular cultural audience. Both the product and its related documentation are then designed to meet the rhetorical expectations that culture associates with credibility. Over time, the company decides to market the product in other nations. The design of the original item and its related materials might, however, conflict with the rhetorical expectations of those “other” cultural audiences. It is at this point that localizers are used to redesign the product to make it appear credible to users from those other cultures (Esselink, 2000; Yunker, 2003). The task of the localizer then becomes a matter of converting information from the rhetorical styles used in source (original) materials to those of a different cultural audience (often known as the target audience).

In performing such “after-the-fact” conversions, localizers often deal with factors of translation (language) and visual design, in terms of both layout and image use. In such cases, the text is often translated into the language of the desired target audience, and visual and design factors are either revised or replaced in order to match the expectations that same audience (Esselink, 2000; Yunker, 2003). Ideally, this process is a relatively simple “find-and-replace” activity in which items in source materials are replaced with culture specific items for other audiences. Unfortunately, certain factors can affect the ease with which localizers can accomplish such a process.

One of the more interesting problems is text expansion. The idea is that information that can be conveyed with a single word in one language might require multiple words to convey the same meaning in another tongue (Esselink, 2000; Yunker, 2003). The English-language expression “overtime pay” (two words), for example, is often translated as “remuneration des herbes supplementaires” (four words) in French. Even in cases in which a single word is used to convey the same concept in different languages, the length of the related word could vary considerably. The English word help
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