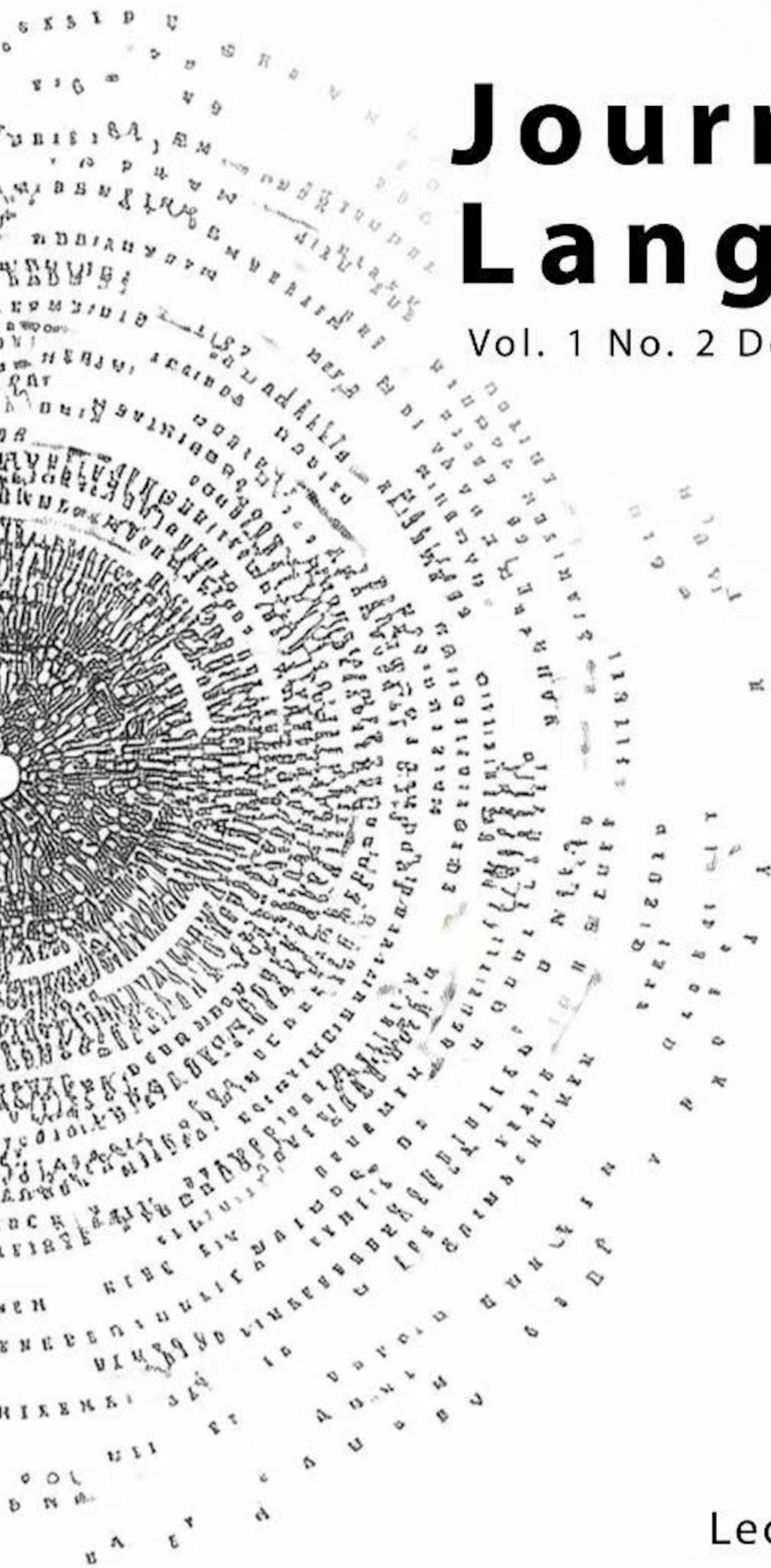

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Contents

Toward a Better Understanding of Developmental Pathway of Cognitive Wisdom: Exploring Its Interplay with Openness, Reflectiveness, and Orientation-to-learning

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Abstract

Wisdom has emerged as a critical educational objective in higher education, yet inconsistent outcomes across university programs have cast doubt on formal education's ability to systematically cultivate wisdom—particularly in the cognitive dimension. This study investigated the dynamic relationships between key precursor factors (openness, reflectiveness, and orientation-to-learning) and wisdom scores in 305 university students enrolled in a wisdom-focused EFL program. Results demonstrated three key findings: (1) paired-samples *t*-tests revealed significant improvement in the judgment subdimension of cognitive wisdom; (2) structural equation modeling (SEM) identified openness and reflectiveness as foundational predictors of wisdom scores, with orientation-to-learning serving as a mediator; and (3) multi-group SEM confirmed the invariance of these relationships across gender groups. These results highlight the crucial role of creating optimal learning conditions that promote critical thinking for wisdom development, while offering practical guidance for designing gender-inclusive wisdom education programs.
Keywords: wisdom, openness, reflectiveness, orientation-to-learning, gender

1. Introduction

According to Russell (1956), possessing knowledge alone does not guarantee wise judgments or effective decision-making. In our current era of unprecedented technological disruption and geopolitical volatility, wisdom has assumed renewed importance as an

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essential resource for living the best of life (Grimm, 2014). This recognition has prompted a paradigm shift in education from viewing wisdom as merely an innate personal trait (Seligman, 2011) to recognizing it as a critical, teachable capacity essential for both personal development and the advancement of gender equity (Ardelt, 2018; Cheraghi et al., 2015; Ferrari et al., 2019).

Despite this conceptual importance, empirical research on wisdom teaching and learning remains strikingly limited. Moreover, the limited existing studies reveal inconsistent effects of university programs across different dimensions of wisdom. Of particular concern is the unresolved question of whether formal education can effectively cultivate the cognitive wisdom (Ardelt, 2018; Ardelt & Bruya, 2020; Bruya & Ardelt, 2018), the cornerstone of wisdom development in higher education (Brown, 2004).

To address this gap, the present study examined how key wisdom precursors identified in developmental models (Glück & Bluck, 2013; Glück et al., 2019; Greene & Brown, 2009) predict the wisdom scores of university students enrolled in a wisdom-fostering EFL program. The findings will offer insights into how wisdom can be taught and learned to maximize the potential of formal education in promoting learner development.

2. Literature

2.1 Wisdom Development and Wisdom Teaching

Although wisdom education has been in academic attention since the 1980s, it was not until the 21st century that it became a research focus in higher education (Jakubik, 2023). Brown (2004) pioneered an empirical approach to explore wisdom development at the tertiary level by interviewing ten recent graduates nominated for their wisdom development in college. This grounded analysis identified six dimensions that characterized wisdom development, including self-knowledge, understanding of others, judgment, willingness to learn, life knowledge and life skills.

Accordingly, Brown and Greene (2006) developed a 66-item Wisdom Development Scale (WDS) based on data collected from 1,188 college students. This scale was later validated not only by Greene and Brown (2009) with working professionals (N=2715, Mean age=34.1) and university students (N=338, Mean age= 21.2) in the United States, but also by Ayoub and Ibrahim (2013) among 618 university students and Al-diabi (2017) in Arabian Gulf countries. Despite its demonstrated validity in measuring the wisdom scores of tertiary learners around the world, the WDS has received scant attention among wisdom researchers. One reason is that the WDS has a dominating focus on the cognitive aspects of wisdom. Yet, existing wisdom teaching and learning studies tend to regard wisdom as a more diversified concept, as demonstrated below.

To the best of our knowledge, wisdom teaching studies were initiated by DeMichelis et al. (2015), who examined the wisdom development of 10 elders and 13 adolescents using the five-dimensional Self-Assessed Wisdom Scale (SAWS) (Webster, 2003). Participants enrolled in an intergenerational high school English course, engaging in novel discussions totaling 4.5 hours over three weeks. Among older adults, results showed a decline in humor and critical life experience dimensions, an increase in the reminiscence dimension, and no significant changes in emotional regulation and openness to experience. In contrast, adolescents exhibited no changes in wisdom scores across all dimensions.

Ardelt (2018) showed that young people’s wisdom could be cultivated at the tertiary level. In her study, participants in the experimental group (N=165) took introductory philosophy courses emphasizing psychosocial growth, while the control group (N = 153) took the same kind of courses but without such emphasis. Finding from the Three-Dimensional Wisdom Scale (3D-WS) (Ardelt, 2003) revealed that the experimental group showed significant growth in the reflective and compassionate dimensions, whereas the control group declined across all three dimensions (cognitive, reflective, and compassionate).

Also using the 3D-WS, Bruya and Ardelt (2018) examined wisdom development among 308 university students across three instructional conditions. Their study design comprised: (1) a control group (57.1% of participants) enrolled in conventional courses; (2) an experimental group (29.2%) taking wisdom-promoting philosophy courses with summative assessment; and (3) a second experimental group (13.6%) completing similar courses with formative assessment. Once again, their study reported dimension-specific findings. The reflective dimension remained stable across all groups, while only the formative assessment group demonstrated significant growth in compassionate wisdom. Most notably, while the cognitive dimension remaining stable in both experimental conditions, it declined significantly in the control group, a pattern consistent with Ardelt and Bruya's (2020) longitudinal findings demonstrating the erosion of cognitive wisdom in conventional academic programs.

These findings consistently shows that while educational interventions can enhance reflective and compassionate dimensions, cognitive wisdom proves particularly resistant to change in specialized programs and often declines in standard curricula. This pattern directly challenges Brown's (2004) cognitive-centric model of wisdom development in higher education. Arguably, investigating the interplay between cognitive wisdom and its key precursors (as identified below) would provide a clearer understanding of its developmental pathway, thereby shedding new light on this unresolved issue.

2.2 Wisdom Precursors

Brown's (2004) foundational work identified four essential conditions for wisdom development in educational settings: (1) orientation-to-learning, (2) meaningful experiences, (3) social interactions, and (4) supportive environments. Among these, orientation-to-learning, defined as one's motivational disposition and cognitive engagement with learning (Greene & Brown, 2009), is considered the primary condition for wisdom development. Surprisingly, this construct has received limited empirical investigation in wisdom research, despite related constructs like willingness-to-learn (Hu et al., 2023) and growth mindset (Alhosseini & Ferrari, 2019) have been found critical for wisdom development.

This research gap persists despite theoretical models of wisdom precursors have advanced. Glück and colleagues' MORE Life Experience Model of Wisdom (Glück & Bluck, 2013; Glück et al., 2019) identifies five key wisdom resources: Mastery (M), Openness (O), Reflectiveness (R), Emotional regulation (E), and Empathy (E). Among these, openness and reflectiveness, also conceptualized as critical thinking dispositions (Álvarez-Huerta et al., 2022), show particular relevance for higher education due to their alignment with academic emphases on analytical reasoning (Cheraghi et al., 2015). Specifically, openness encompasses the ability to recognize the limitations of one's knowledge and genuinely consider alternative perspectives (Glück, 2015). Empirical studies consistently support its role as a robust predictor of wisdom (Leeman et al., 2022; Wink & Staudinger, 2015). Meanwhile, reflectiveness involves the capacity to analyze events at deeper levels while transcending subjective biases (Ardelt et al., 2013). As a teachable disposition that can be cultivated from early adolescence, it is also regarded a critical precuror of wisdom development at college (Westrate, 2017).

The robust conceptual alignment between openness and reflectiveness – as both critical thinking dispositions and fundamental academic objectives – suggests promising synergies with Brown's (2004) learning conditions, though rigorous empirical investigation remains necessary to validate these theoretical relationships.

2.3 Wisdom Education and Gender

Research suggests gender may also influence wisdom development. Orwoll and Achenbaum (1993) drew on the socialization of men and women to propose gender-differentiated patterns, with men potentially excelling in cognitive dimensions and women in

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interpersonal aspects, while also advancing the androgyny hypothesis that wise individuals integrate both masculine and feminine traits. This complexity of gender difference in wisdom was well-illustrated by a recent investigation of the wisdom profiles of 659 participants (Treichler et al., 2022). Women were found to score higher on compassion-related domains in the 3D-WS and on self-reflection in the San Diego Wisdom Scale (SD-WISE) (Thomas et al., 2019). In contrast, men scored higher on cognitive dimension in the 3D-WS and on emotion regulation in the SD-WISE. Moreover, while women generally scored higher on the 3D-WS, no gender differences were found in the overall SD-WISE scores. These variations may reflect measurement inconsistencies, yet they remain crucial considerations for wisdom education committed to gender equity.

Ferrari et al. (2019) identified three scenarios of wisdom education: formal education, which aims to foster wisdom by developing logical reasoning; non-formal education, which relies on religious teachings; and informal education, which emphasizes sociocultural norms and the social division of labor. Whereas non-formal and informal education may reinforce gender stereotypes by reproducing the traditional role expectations, formal education appears uniquely positioned to create equitable wisdom development environments. Supporting evidence comes from Cheraghi et al. (2015), demonstrating that in Iran, higher-educated young women demonstrated greater wisdom than less-educated older women. This pattern suggests formal education may serve as an equalizing mechanism for historically disadvantaged groups. However, these findings simultaneously raise critical questions about potential gender-differentiated pathways in wisdom development within higher education contexts.

3. The Current Study

To address these research gaps, this study examined the connection among key wisdom precursors and wisdom development scores among university students participating in a specially designed EFL program, “Insights into Classic English Films”. This program aimed to promote students’ interest in English learning by engaging them in examining universal life themes. The eight films chosen to facilitate learners’ critical thinking and cognitive engagement were Forrest Gump, Coco, The Shawshank Redemption, Mona Lisa Smile, Jane Eyre, Wonder, Pride and Prejudice, and The Sound of Music.

The 10-week intervention employed a structured blended learning approach, combining asynchronous online activities with synchronous online seminars, as illustrated in Table 1. At the end of the program, students completed an essay test that encompassed open-ended essay writing and reflective course summary.

This study investigated three core questions regarding wisdom development in higher education:

1. To what extent did participants’ wisdom scores change during a wisdom-fostering EFL course?

2. How did the hypothesized precursors, openness, reflectiveness, and orientation-to-learning, interact to predict wisdom scores before and after the intervention?

3. Did the relationships between wisdom precursors and outcomes remain invariant across gender groups?

Table 1 Wisdom-fostering Activities in “Insights into Classic English Films”.

Learning activities	Learning goals-Openness	Learning goals-Reflectiveness
Week 1: Online seminar	lecture, open-ended questions	reflective journal; open-ended questions
Week 2-4: Online learning	video clips, open-ended questions	
Week 5: Online seminar	group presentation, peer/teacher feedback	reflective journal, discussion, open-ended questions
Week 6-8: Online learning	video clips, open-ended questions	
Week 9: Online seminar	group presentation, peer/teacher feedback	reflective journal, discussion, open-ended questions
Week 10: In-person exam	summative test (open-ended essay item)	summative test (reflective course summary)

Guided by the MORE Life Experience Model (Glück & Bluck, 2013; Glück et al., 2019) and Brown's (2004) educational framework, we advanced two key hypotheses:

H1: Openness and reflectiveness would demonstrate significant positive correlations in jointly predicting participants' wisdom scores.

H2: Orientation-to-learning would mediate the relationship between these wisdom resources (openness/reflectiveness) and wisdom outcomes, consistent with Brown's (2004) emphasis on learning conditions (see Figure 1).

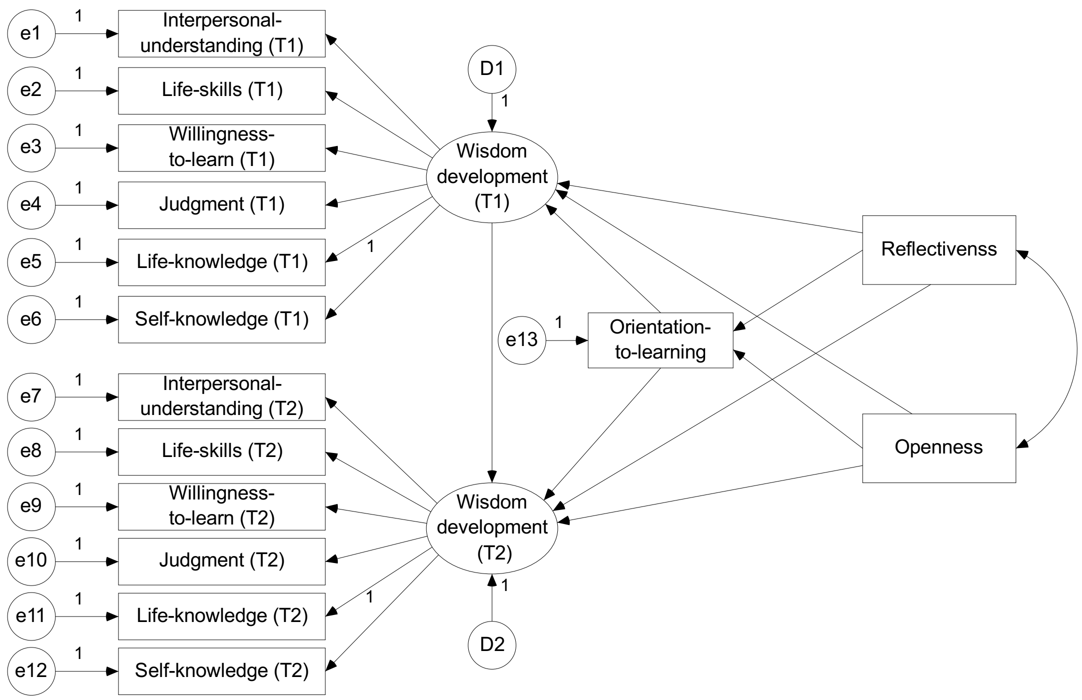

Fig. 1. The hypothesized model of the interrelationship among openness, reflectiveness, orientation-to-learning, and BWDS scores at Time 1 (T1) and Time 2 (T2).

3.1 Participants

The study initially recruited 400 Chinese first-year university students (Mean age = 18.69 years, SD = 0.745; range = 17-22 years) representing five academic disciplines: engineering (N = 156, 39%), humanities (N = 100, 25%), education (N = 88, 22%), science (N = 36, 9%), or arts (N = 20, 5%).

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All participants provided informed consent after receiving full disclosure about the study's purpose and their voluntary participation rights. The final sample comprised 305 students who completed all study procedures, consisting of 164 males (53.8%) and 141 females (46.2%), completed all the data collection procedures.

3.2 Instruments

3.2.1 The Wisdom Scale

To ensure that participants remained focused while answering the questionnaire, we utilized the 18-item short-form of the WDS (see Appendix B), developed by Fung et al. (2020) based on the original 66-item scale (Brown & Greene, 2006). The brief WDS (BWDS) encompasses six dimensions: self-knowledge (item 1-3), interpersonal understanding (item 4-6), judgment (item 7-9), life knowledge (item 10-12), life skills (item 13-15), and willingness to learn (16-18). Each item in the scale is rated on a seven-point Likert scale ranging from 1 ("Strongly disagree") to 7 ("Strongly agree").

3.2.2 Openness and Reflectiveness

The Critical Thinking Disposition Scale (CTDS; Sosu, 2013; Appendix C) was administered to assess openness and reflectiveness. This 11-item scale was developed through rigorous validation involving two independent samples of tertiary students (N1 = 467; N2 = 371), demonstrating strong psychometric properties. In this scale, openness (item 1-5) is defined as the proactive inclination towards new ideas and the willingness to modify one's ideas based on critical thinking, and reflectiveness (item 6-11) is defined as the tendency to question evidence while maintaining a willingness to learn from one's experiences.

3.2.3 Orientation-to-learning

The Openness to Diversity and Challenge Scale (ODCS; Pascarella et al., 1996; Appendix D), was applied to measure orientation-to-learning. This unidimensional, seven-item scale was developed on a large sample of 3,910 university students, providing information on respondents' attitudes towards learning from diverse ideas, different cultures, and different values, as well as their cognitive engagement in learning. Given its strong alignment with Brown's (2004) conception of orientation-to-learning, we decided to adopt this scale for the measurement of this key learning condition.

Items in both the CTDS and ODCS were rated on a five-point Likert scale ranging from 1 ("Strongly disagree") to 5 ("Strongly agree").

3.3 Data Collection

On the first day of the program, students completed the BWDS, the CTDS, and the ODCS. They then filled out the BWDS for a second time on the last day of the program. The electronic questionnaire platform Wenjuanxing was used on both occasions.

3.4 Data Analysis

3.4.1 Preliminary Statistical Analyses

We utilized SPSS version 19.0 to conduct item parceling and to calculate descriptive statistics and Cronbach's alpha for each scale. Reliability estimates exceeding 0.70 for the overall scales were considered acceptable for measurement purposes.

For the SEM study, we examined the univariate normality assumptions of these variables, considering skewness and kurtosis values within the range of -1 to +1 as indicative of univariate normality (Kline, 2019).

3.4.2 Paired-sample *t*-test

To address RQ1, we conducted paired-sample *t*-tests on the overall BWDS and individual dimensions to identify changes between participant groups at T1 and T2. Additionally, we calculated Cohen's d using pooled standard deviations to evaluate effect sizes for these differences, with thresholds of 0.2, 0.5, and 0.8 used to define small, medium, and large effect sizes, respectively.

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3.4.3 SEM

To address RQ2, we applied a multivariate SEM approach to analyze the relationship between the observed variables (as reported in the descriptive statistics) and the latent variables (as reported in the item parceling results). More importantly, we aimed to identify the pattern of interactions among the latent variables to reveal how openness, reflectiveness, and orientation-to-learning relate to BWDS scores over.

To establish a baseline model for the multi-sample analyses, we examined the goodness-of-fit indices of the SEM for each gender group. According to Kline (2019), a model is considered to have a good fit if it meets the following criteria: the Chi-square statistic ($\chi2$), the Chi-square statistic each degree of freedom ($\chi2/df$) ($\leqslant 2.5$), the comparative fit index (CFI) ($\geqslant .90$), the Tucker-Lewis index (TLI) ($\geqslant .90$), the root mean square error of approximation (RMSEA) ($\leqslant .08$), and standardized root mean square (SRMR) ($\leqslant .08$).

3.4.4 Multi-group SEM

To address RQ3, multi-group SEM was used to examine the cross-group invariance of the interrelationships among openness, reflectiveness, orientation-to-learning, and BWDS scores. We first examined an unconstrained model without equality constraints. We then evaluated models with equivalence in the following areas: a) model structure (configural invariance), b) factor loadings (metric invariance), c) factor loadings and item intercepts (scalar invariance), and d) factor loadings, item intercepts, and item residuals (residual invariance).

4. Results

4.1 Descriptive Statistics

As shown in Table 2, the skewness and kurtosis for the BWDS dimensions, openness, and reflectiveness were within acceptable ranges. The means for the seven-point BWDS

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scores varied from 5.050 (interpersonal-understanding at T1) to 5.562 (judgment at T2). The means for the five-point antecedent variables ranged from 3.909 (reflectiveness) to 4.003 (openness). The subscale reliability ranged from .700 (life-knowledge at T1) to 0.875 (orientation) and overall reliability ranged from .804 (openness) to .951 (BWDS at T2), indicating satisfactory results. Both the skewness and kurtosis values were within acceptable range of -1 to +1. Correlation information for variables is presented in Appendix E.

Table 2 Estimates for key variables.

Scale	Variables	α	Mean	SD	Skewness	Kurtosis
BWDS (T1)	● Interpersonal-understanding	.728	5.050	.808	-.041	.247
	● Life-skills	.729	5.194	.876	-.100	-.218
	● Willingness-to-learn	.727	5.349	.873	-.188	-.227
	● Judgment	.770	5.352	.876	.085	-.372
	● Life-knowledge	.700	5.460	.882	-.289	.038
	● Self-knowledge	.729	5.375	.910	-.049	-.695
	Overall BWDS	.930	5.297	.736	-.051	-.221
BWDS (T2)	● Interpersonal-understanding	.777	5.143	.855	.064	-.345
	● Life-skills	.710	5.204	.867	-.044	-.363
	● Willingness-to-learn	.751	5.287	.912	.053	-.567
	● Judgment	.712	5.562	.886	-.235	-.495
	● Life-knowledge	.739	5.477	.887	-.085	-.599
	● Self-knowledge	.727	5.433	.858	-.069	-.414
	Overall BWDS	.951	5.351	.774	-.031	-.330
CTDS	● Openness	.804	4.003	.522	-.023	-.159
	● Reflectiveness	.813	3.909	.498	.242	-.017
ODCS	● Orientation-to-learning	.875	3.985	.598	-.041	-.557

The paired-sample t-test results presented in Table 3 showed that most BWDS variables did not change at different time points, except for the average judgment scores (T1 = 5.352, T2 = 5.562, Cohen's d = -.238, low-to-medium).

Table 3 Learners' overall and dimensional BWDS scores over T1 and T2.

	Paired-sample t-test				
	Mean	SD	t	*p*	Cohen's *d*
Interpersonal-understanding	-.093	.825	-1.931	.054	-.112

Life-skills	-.010	.855	-.193	.847	-.012
Willingness-to-learn	.062	.882	1.202	.230	.070
Judgment	-.211	.922	-3.918	.000*	-.238
Life-knowledge	-.016	.891	-.316	.752	-.019
Self-knowledge	-.057	.914	-1.074	.284	-.066
Overall BWDS	-.054	.706	-1.317	.189	.072

* $p < .001$

4.2 The Antecedents of Wisdom Developments

Table 4 presents the fitness of the proposed SEM model, which posits that the two wisdom resource factors of openness and reflectiveness have both direct and indirect effects on BWDS scores at T1 and T2, with the indirect effects mediated by the learning condition of orientation-to-learning. Due to the unsatisfactory fit of the hypothesized model, we drew on the modification indices provided by Amos 17.0 to propose a modified model for the male and female students, as depicted in Figure 2 and Figure 3.

Table 4 Assessment of SEM model fits with two task groups.

	χ^2	*df*	χ^2/df	CFI	TLI	RMSEA	SRMR
Male students							
Initial model	179.629	85	2.113	.953	.942	.083	.040
Modified model	129.030	80	1.613	.976	.968	.062	.037
Female students							
Initial model	234.223	85	2.756	.907	.885	.116	.047
Modified model	147.700	80	1.846	.958	.945	.080	.041

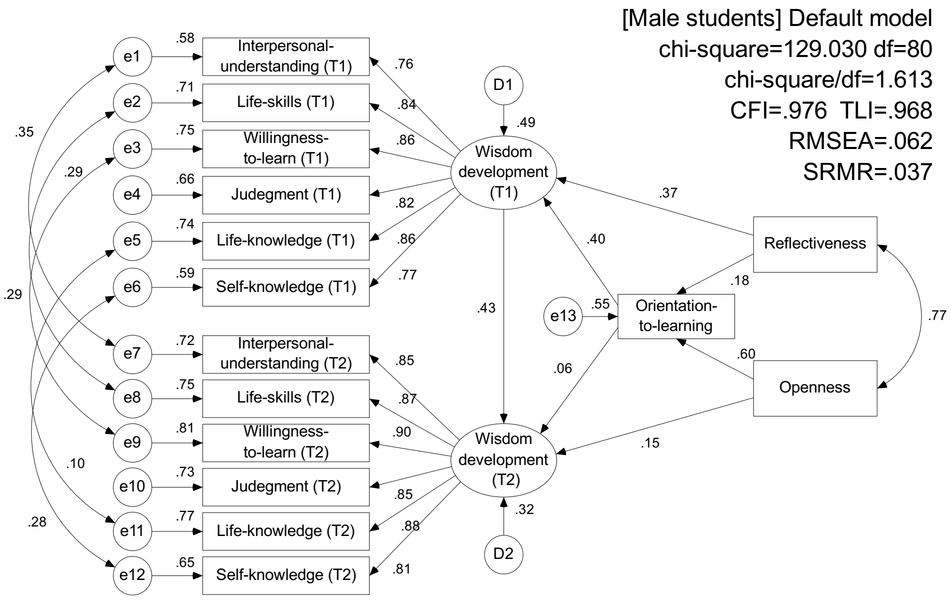

Fig. 2 The modified model of the interrelationship among openness, reflectiveness, orientation-to-learning, and wisdom development scores at T1 and T2 for male students.

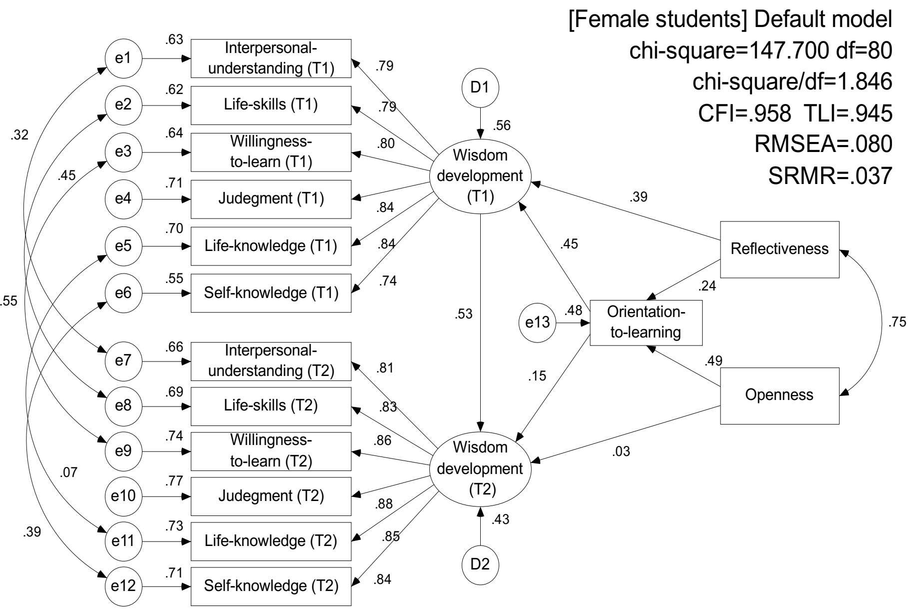

Fig. 3 The modified model of the interrelationship among openness, reflectiveness, orientation-to-learning, and wisdom development scores at T1 and T2 for female students.

This modified model assumes covariance among errors associated with BWDS variables measured at T1 and T2, except for judgment, which showed significant change at different time points. Additionally, the model assumes that openness only indirectly predicts

BWDS at T1, while reflectiveness only indirectly affects BWDS at T2. The modified model demonstrated an excellent fit for the male student group ($\chi2$ = 129.030, df = 80, $\chi2$/df = 1.613, CFI = .976, TLI = .968, RMSEA = .062, SRMR = .037) and the female student group ($\chi2$ = 147.700, df = 80, $\chi2$/df = 1.846, CFI = .958, TLI = .945, RMSEA = .080, SRMR = .041). Hence, it was chosen as the baseline model for the multi-group SEM.

4.3 The Multi-group SEM

We conducted cross-sample comparisons using the previously identified baseline model, which was freely estimated without parameter constraints. The results presented in Table 5 indicated a good fit for the data ($\chi2$ = 106.89, df = 50, CFI = .990, TLI = .980, RMSEA = .050, SRMR = .050), suggesting that identified factor structure showed configural invariance between male and female learners.

Table 5 Assessment of structural model for cross-validation.

Models	χ^2	*df*	CFI	TLI	RESEA	SRMR	$\Delta\chi^2(\Delta df)$	$p(<.05)$
Baseline	276.763	160	.968	.958	.050	.037		
Configural	278.867	170	.970	.963	.047	.037	2.103(10)	.995
Metric	282.015	177	.971	.966	.045	.039	3.148(7)	.871
Scalar	289.046	180	.970	.965	.046	.043	7.032(3)	.071
Residual	301.933	183	.967	.962	.046	.047	12.887(3)	.005*

Next, we imposed constraints on the model structure across gender groups to assess the number and configuration of the factors. We further investigated potential differences in the model structure by constraining one clustering coefficient at a time in each round. These constrained models, each with one restricted clustering coefficient, were compared to the unconstrained model where all clustering coefficients were freely estimated. The overall factor structure remained stable ($\Delta\chi2/\Delta$df = 2.103(10), p = .995), suggesting that the gender difference was not observed in the structural model.

We then examined metric invariance by imposing constraints on factor loadings in addition to restricting the model structures. Chi-square test results ($\Delta\chi 2/\Delta df$ = 3.148(7), p = .871) indicated that the metric invariance was maintained.

Subsequently, we examined the potential difference between the scalar and metric models. The insignificant p value ($\Delta\chi 2/\Delta df$ = 7.032(3), p = .071) showed that scalar invariance was maintained despite the additional constraints on item intercepts alongside the factor loading restrictions.

Finally, to assess the residual model, we imposed additional constraints on the item residuals. The findings suggested that residual invariance did not hold, as indicated by the significant chi-square difference ($\Delta\chi 2/\Delta df$ = 12.877(3), p = .005). However, since item residuals are not considered part of a latent factor, their variance was not further investigated.

In summary, openness, reflectiveness, and orientation-to-learning interacted similarly across gender groups to predict wisdom development at T1 and T2.

5. Discussion

Wisdom represents a paramount educational objective that empowers young people to deal with complex existential challenges in this rapidly evolving world (Baltes & Kunzmann, 2003). Yet persistent inconsistencies in educational outcomes across wisdom dimensions have cast doubt on formal education’s capacity to foster comprehensive wisdom development while ensuring gender-equitable learning environments.

Focusing on the particularly resistant cognitive dimension of wisdom (Ardelt, 2018; Bruya & Ardelt, 2018), this study sought to unravel the dynamic interplay among three theoretically-grounded precursors, i.e., openness, reflectiveness, and orientation-to-learning (Brown, 2004; Glück & Bluck, 2013; Glück et al., 2019) and BWDS scores. This study provides preliminary evidence that a wisdom-fostering EFL program may enhance cognitive wisdom, as indicated by improved judgment scores. The SEM results revealed stable associations between critical thinking dispositions and wisdom scores across time points,

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with orientation-to-learning serving as a consistent mediator. The multi-group SEM confirmed that the developmental pathway of wisdom remained consistent across gender groups.

5.1 Wisdom Teaching

Existing research has established the malleability of wisdom's reminiscence (DeMichelis et al., 2015) and affective dimensions (Ardelt, 2018; Bruya & Ardelt, 2018), yet consistently demonstrates the cognitive dimension's resistance to change (Ardelt, 2018; Bruya & Ardelt, 2018) and even decline in standard curricula (Ardelt & Bruya, 2020). Our EFL intervention produced measurable gains in cognitive wisdom's judgment dimension, marking the first empirical evidence of cognitive wisdom's responsiveness to educational efforts.

In addition to the BWDS's precise measurement of cognitive wisdom, the positive outcome of the EFL intervention could also be attributed to our innovative pedagogical design. Unlike previous research which has documented wisdom development in L1 context (DeMichelis et al., 2015) and introductory philosophy courses (Ardelt, 2018; Bruya & Ardelt, 2018), our EFL program implemented an interdisciplinary approach designed to optimize cognitive load and enhance learning engagement. Through scaffolded instructional sequences, including presentations, feedback sessions, and guided discussions, students cultivated analytical competencies to interpret characters' decision-making across sociolinguistic boundaries, and critically evaluate their life-altering choices. This pedagogy operationalizes Ferrari and Kim's (2019) conception of wisdom exemplars, allowing learners to see ideas in carefully curated film narratives. It also aligns with Skehan's (2015) Limited Attention Capacity Hypothesis, enabling learners to devote more cognitive resources to higher-order processing to achieve development in the judgement dimension.

In summary, these findings provide the first empirical validation of university

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programs' capacity to foster cognitive wisdom development, substantiating Brown's (2004) qualitative finding that emphasizing cognitive wisdom development at the tertiary level. Moreover, our study demonstrates how an EFL-based pedagogical approach that provides curated wisdom exemplars and scaffolded activities can create optimal conditions for wisdom growth.

5.2 Wisdom Precursors

Among the range of wisdom precursors nominated in the theoretical models of wisdom development (Brown, 2004; Glück & Bluck, 2013; Glück et al., 2019), we focused on openness, reflectiveness, and orientation-to-learning due to their (a) theoretical primacy in wisdom development, (b) established links to wisdom development (Leeman et al., 2022; Wink & Staudinger, 2015; Weststrate, 2017), and (c) alignment with our program's mechanisms to facilitate cognitive engagement. The SEM results revealed that reflectiveness and openness, conceptualized both as wisdom resources in the MORE model (Glück & Bluck, 2013; Glück et al., 2019) and as critical thinking dispositions (Álvarez-Huerta et al., 2022), were significantly correlated and jointly related to participants' BWDS scores. Importantly, this relationship was mediated by orientation-to-learning, which Brown (2004) conceptualized as a fundamental learning condition for wisdom development.

Our findings extend previous cross-sectional research on openness and reflectiveness (Leeman et al., 2022; Wink & Staudinger, 2015; Weststrate, 2017) by demonstrating their close correlation and their relations with the BWDS scores over different time points. This provides empirical validation for Glück and colleagues' theoretical framework while revealing the crucial mediating role of orientation-to-learning. This novel contribution distinguishes our work from studies of related constructs like growth mindset (Alhosseini & Ferrari, 2019) and willingness-to-learn (Hu et al., 2023).

The temporal patterns of mediation revealed important nuances in the relationships among wisdom precursors and wisdom scores. While reflectiveness showed direct effects at baseline (T1), these became fully mediated by orientation-to-learning at post-test (T2), suggesting the program's structured guidance was necessary to help students bridge sociolinguistic gaps in the film materials. Conversely, openness transitioned from fully mediated associations at T1 to direct associations at T2, indicating that the rich, diverse life experiences portrayed in the wisdom exemplars eventually enabled students to engage in independent open-minded reflection.

The dynamic interplay between these wisdom precursors advances the current understanding of wisdom development, demonstrating how carefully crafted educational interventions can effectively cultivate cognitive wisdom.

5.3 Wisdom Growth across Gender

Among the three wisdom scenarios identified by Ferrari et al. (2019), formal education provided by schools and universities is more likely to contribute to gender equality in wisdom growth than informal and nonformal education, both of which emphasize traditional gender roles. However, until now, the critical question of whether university programs provide a gender-neutral development environment for both genders has remained unanswered.

The multi-group SEM analysis revealed that openness, reflectiveness, and orientation-to-learning interacted in the same way in relating to the BWDS scores for both male and female students, thereby demonstrating that university education does not privilege one gender's developmental pathway over another. This is significant because it suggests that educational institutions, at least in the current case of EFL program, can effectively support the development of wisdom in both male and female students without favoring one gender over the other.

6. Conclusion

Against the background of the growing importance of wisdom education, this study presents a focused study on cognitive wisdom, a wisdom dimension that has been found to be resistant to educational effort, by investigating its associations with key wisdom precursors. Paired-sampled *t*-tests revealed, for the first time, evidence of growth in the cognitive wisdom of judgment. Multi-group SEM study revealed associations between wisdom precursors and BWDS scores, with orientation-to-learning mediating the connections between the BWDS scores and the two wisdom resource factors of openness and reflectiveness at both time points and across gender groups. These findings offered three key insights to advance our understanding of wisdom development in the formal educational context.

First, the application of the BWDS, which offers an accurate measurement of the cognitive wisdom enabled us to demonstrate that cognitive wisdom growth is achievable when pedagogical approaches align with cognitive load principles. The EFL program's use of curated wisdom exemplars and structured learning activities scaffolds judgment development, challenging the presumed limitations of formal education in fostering cognitive wisdom (Ardelt, 2018; Bruya & Ardelt, 2018; Ardelt & Bruya, 2020).

Second, we have empirically validated and extended Glück and colleagues' (2013, 2019) MORE model by demonstrating how the immediate educational condition of orientation-to-learning operates as the critical mechanism through which dispositional traits translate into wisdom scores. The temporal dynamics of mediation effects, particularly the shift from mediated to direct effects for openness, reveal that orientation-to-learning serves as both a gateway and an adjustable scaffold in the developmental process. The dynamic interplay among wisdom precursors and wisdom scores reveals valuable information on the mechanism of wisdom development, suggesting that disciplinary context and the mediating role of orientation-to-learning may be crucial variables in fostering cognitive wisdom.

Third, our multi-group analyses confirm that formal education can create gender-equitable pathways for wisdom development. This finding suggests that well-designed educational programs can effectively support the development of wisdom in both male and female students, thereby promoting a more balanced and equitable society. Specifically, we included both films that cover both typical male perspectives (e.g., Forrest Gump and The Shawshank Redemption) and female perspectives (e.g., Pride and Prejudice and Jane Eyre) in life. Future research should continue to explore the mechanisms through which formal education can engage both male and female students to facilitate their wisdom development, ensuring that educational practices are inclusive and effective for all learners.

This study has several limitations. First, while the observed improvement in the judgment dimensions offers promising preliminary evidence of cognitive wisdom development, a dimension notably resistant to educational interventions, we acknowledge the limitations of this isolated finding. Given the insignificant changes in the other five BWDS dimensions and composite scores, we cannot definitively exclude the possibility that this result occurred by chance. Since this is probably due to the relatively brief duration of intervention, future research should examine whether extended implementations or modified curricula might produce more comprehensive effects.

Second, this study intentionally focused on core wisdom precursors that are not only most likely to relate to the BWDS scores, but also in close alignment with the current intervention specifically targeting critical thinking disposition and orientation-to-learning. Therefore, we did not explore other wisdom precursors identified by Glück and Bluck (2013) and Brown (2004). Future research should investigate the effects of these additional precursors in a wider range of wisdom educational contexts.

Third, due to practical constraints, this study did not include a control group, which prevents definitive conclusions about the program’s causal efficacy. While our SEM models suggest plausible developmental pathways, these relationships remain correlational. Future research should employ randomized controlled designs to establish causal effects.

In conclusion, this study underscores the potential of formal education to foster wisdom development in a gender-neutral manner, provided that the curriculum is thoughtfully designed to provide an engaging environment for learners' critical thinking dispositions to function effectively. The findings highlight the importance of orientation-to-learning as a critical factor in promoting cognitive wisdom, offering valuable insights for educational practice and policy.

Funding

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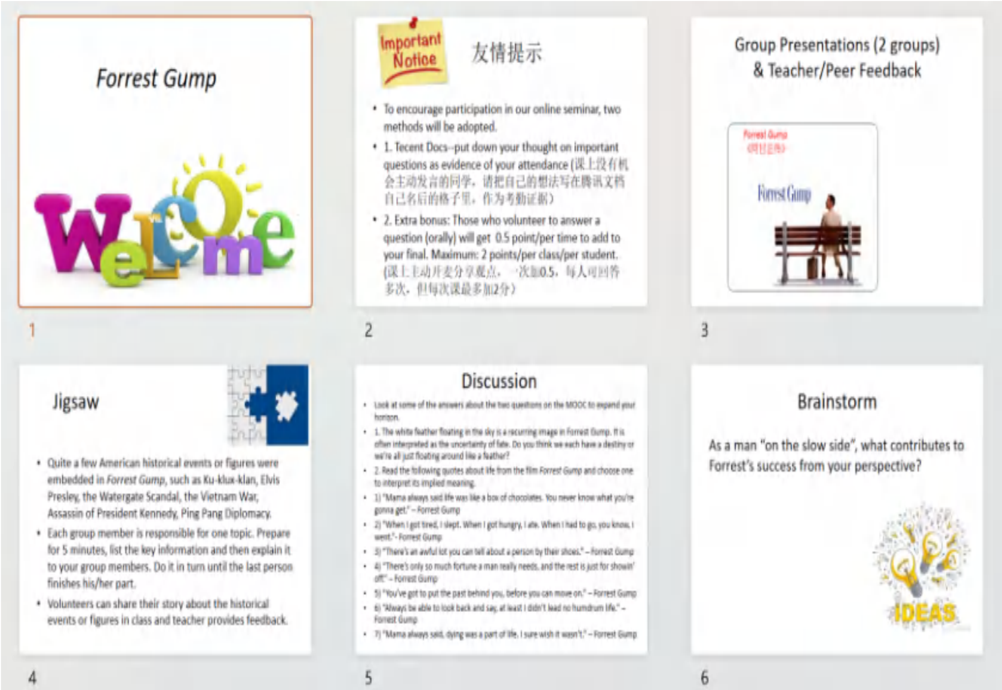
1. Appendix A. Wisdom-fostering Episodes based on the film Forrest Gump

(The rest films are *Coco, The Shawshank Redemption, Mona Lisa Smile, Jane Eyre, Wonder, Pride and Prejudice, and The Sound of Music*)

2. A Course Overview



3. Mini Video Course I

4. Mini Video Course II

5. Mini Video Course III

6. Watch Clips 1 and Discuss:

任务点

Discussion 1 --Clip 1 置顶 回复

徐 老师 2023-03-15 15:43 英语经典影片赏析河源班、开放班级 阅读 148 删除

The white feather floating in the sky is a recurring image in Forrest Gump. It is often interpreted as the uncertainty of fate. Do you think we each have a destiny or we're all just floating around like a feather?

- Examples of female students' answers:

英语经典影片赏析河源班

第61楼 2023-05-05 19:52

I think each of us is like a leaf wandering in the breeze. Life is changeable. We can't predict the future. All we can do is to always maintain an optimistic attitude towards life and live a good life. If we encounter a hammer from life, we will brush off the dust from our shoulders and continue to move forward.

英语经典影片赏析河源班

第20楼 2023-04-09 23:09

I think fate is a matter of both destiny and individual effort and choice. Everyone is born with a part of their destiny, but their experiences, choices and efforts can also influence their fate. Therefore, each of us has a certain degree of autonomy and choice, can change and influence their own destiny through their own efforts. At the same time, we also need to accept that some things cannot be changed, need to learn to adapt and adjust.

- Examples Male student's answers:

英语经典影片赏析河源班
第70楼 2023-05-10 14:31

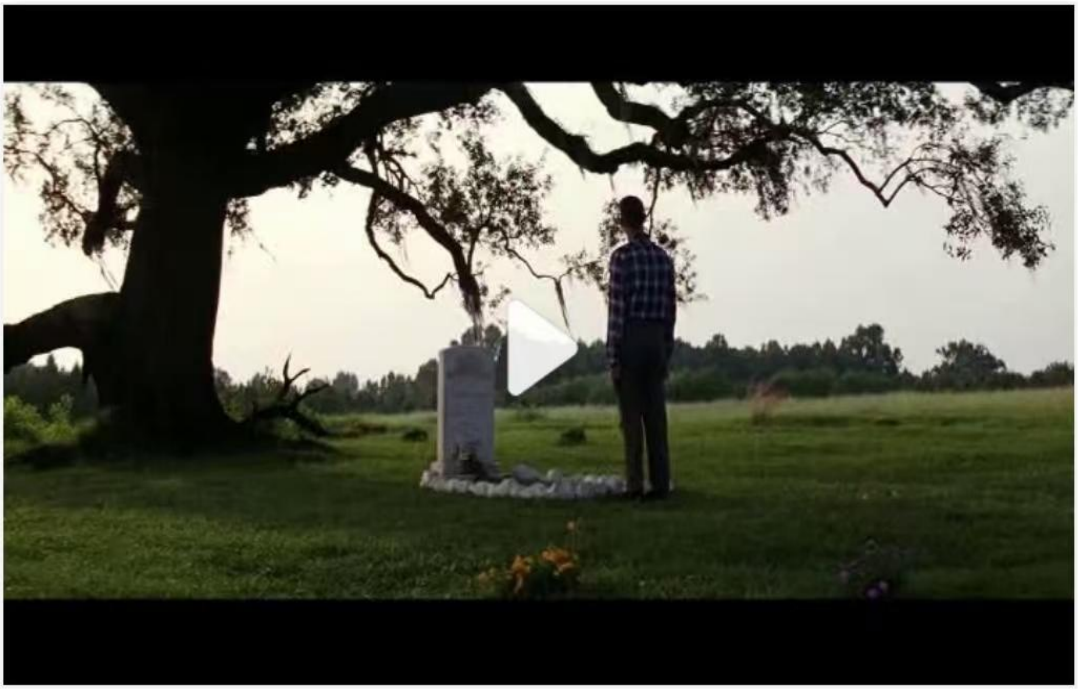
yes,we can't change a lot.

英语经典影片赏析河源班
第19楼 2023-04-09 18:30

I think we have destiny. We always have our duty to do in the world

7. Watch Clips 2 and Discuss：

任务点



Discussion 2-Clip 2 置顶

徐 老师 2023-03-15 12:09 英语经典影片赏析河源班、开放班级 阅读 74 删除

Read the following quotes about life from the film Forrest Gump and choose one to discuss about the implied meaning of it.
1) "Mama always said life was like a box of chocolates. You never know what you're gonna get." – Forrest Gump
2) "When I got tired, I slept. When I got hungry, I ate. When I had to go, you know, I went."- Forrest Gump
3) "There's an awful lot you can tell about a person by their shoes." – Forrest Gump
4) "There's only so much fortune a man really needs, and the rest is just for showin' off." – Forrest Gump
5) "You've got to put the past behind you, before you can move on." – Forrest Gump
6) "Always be able to look back and say, at least I didn't lead no humdrum life." – Forrest Gump
7) "Mama always said, dying was a part of life. I sure wish it wasn't." – Forrest Gump

- Examples of male students' answers:

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英语经典影片赏析河源班

第38楼 2023-05-05 19:07

I choose the one. The life have many question that we don't know.

英语经典影片赏析河源班

第37楼 2023-05-05 16:50

There are bitter chocolate and sweet chocolate, but they all look the same, you have to eat it to know if it is sweet or bitter, just like life, experience to know

- Examples of female students' answers:

英语经典影片赏析河源班

第14楼 2023-04-09 23:13

I think the line "Mama always said life was like a box of chocolates. You never know what you're gonna get." describes the uncertainty and unpredictability of life. Just like opening a box of chocolates, each chocolate has a different taste and surprise, we cannot predict and control the changes and opportunities in our life. This saying also reminds people to adapt to the changes in life, accept the challenges and difficulties in life, and make the most of and enjoy every moment of life. In addition, this phrase can be interpreted as referring to the variety and richness of life. Each person's life has a different experience and story, just as each flavor in a box of chocolates has its own unique characteristics and charm. Therefore, we should respect and appreciate everyone's life and be tolerant and open to different choices and experiences.

英语经典影片赏析河源班

第40楼 2023-05-05 20:07

I choose the first sentence. Life is like a box of chocolates. You never know what the next one tastes like. Indeed, life is full of joys and sorrows. Like a box of chocolates that doesn't know the sweetness, we will never know what will happen in the next moment. All we can do is to resist bravely when the storm comes and live our own wonderful life in simple days.

Appendix B. Brief Wisdom Development Scale

1. I am well aware of all of my weaknesses.
2. I am well aware of all of my values.
3. I am well aware of all of my interests.
4. I learn from others.
5. I have general confidence in what I know.
6. I present well-supported arguments.
7. I am aware of different ways of life, philosophies, and cultures.
8. I integrate and apply what I have learned from one part of my life to another.
9. I understand how my background has shaped my perspective on things.
10. I see the interconnectedness between people and the natural world.
11. I see the interconnectedness between knowledge and ideas.
12. I recognize that there are cycles in life.
13. I have a sense of purpose in my life.
14. I make sound decisions.
15. I attend to the important matters in my life.
16. I learn from my experiences.
17. I enjoy learning for the sake of learning.
18. I am open to change.

Appendix C. Critical Thinking Disposition Scale (CTDS)

1. 1.I usually try to think about the bigger picture during a discussion.

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2. 2.I often use new ideas to shape (modify) the way I do things.
3. 3.I use more than one source to find out information for myself.
4. 4.I am often on the lookout for new idea.
5. 5.I sometimes find a good argument that challenges some of my firmly held beliefs.
6. It's important to understand other people's viewpoint on an issue.
7. It is important to justify the choices I make.
8. 8.I often re-evaluate my experiences so that I can learn from them.
9. 9.I usually check the credibility of the source of information before making judgement.
10. 10.I usually think about the wider implications of a decision before taking action.
11. 11.I often think about my actions to see whether I could improve them.

Appendix D. Openness to Diversity and Challenge Scale (ODCS)

1. I enjoy taking courses that challenge my beliefs and values.
2. Learning about people from different cultures is a very important part of my college education.
3. I enjoy talking with people who have values different from mine, because it helps me better understand myself and my values.
4. The courses I enjoy most are those that make me think about things from a different perspective.
5. Learning about people from different cultures is a very important part of my college education.
6. I enjoy having discussions with people whose ideas and values are different from my own.
7. The real value of a college education lies in being introduced to different values.

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From Distance to Rupture to Bridging: Linguistic–Cultural Risk Mapping and Data-Intelligent Governance Mechanisms in Chinese Enterprises' Expansion into Latin America

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Abstract

In the course of Chinese enterprises accelerating their expansion into Latin American markets, capital and productive capacity have achieved an unprecedented hard landing, yet language and culture are increasingly emerging as an implicit soft barrier. Existing studies mostly focus on institutional environment, political risk and macro-level strategic deployment, while discussions of linguistic and cultural factors tend to remain at a principled level and have not yet formed a systematic framework that can be incorporated into enterprise risk management systems. Adopting a conceptual research design, this study develops an analytical framework and a governance model to address this gap. Building on a review of research on language in international business and on language risk, this article establishes linguistic–cultural risk as an independent risk category and identifies four interrelated risk domains: institutional–compliance, organizational–coordination, market–narrative and data–algorithmic risk. The article introduces the dynamic analytical framework of distance–rupture–bridging and, from the perspectives of linguistic distance, distance in cultural memory and cognitive–narrative distance, constructs a linguistic–cultural risk map for Chinese enterprises entering Latin America. Further, the article conceptualizes generative artificial intelligence and intelligent language services as a new form of infrastructure for data-intelligent language governance, and proposes a closed-loop governance mechanism of identification–assessment–early warning–intervention–review, together with corresponding pathways for organizational embedding at the strategic, functional, project and cooperation levels. It argues that upgrading linguistic and cultural factors from a soft issue to a measurable and manageable, independent risk category not only helps enhance the business resilience of Chinese enterprises operating in Latin America, but also offers new theoretical perspectives and practical directions for the language services industry's transformation from translation processing to risk-oriented language governance, and for foreign language education's shift from single language competence cultivation to a tripartite curricular system of language

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competence + risk literacy + data-intelligent tool literacy.

Keywords: Chinese enterprises going global, Latin America, linguistic and cultural risk, intelligent language services, data-intelligent governance

1. Introduction

1.1 Macro Context and Practical Dilemmas: Capital Hard Landing and Linguistic–Cultural Soft Barriers

In recent years, ties between China and Latin America in the fields of trade, investment, and capacity cooperation have continued to deepen. Chinese enterprises have been steadily expanding their presence in infrastructure construction, energy transition, and the digital economy, thereby weaving a multi-level, multi-industry network of economic and trade relations (Lou, 2024). At the macro level, Chinese companies have achieved a marked hard landing of capital and productive capacity in Latin America, becoming an important force in driving local industrial upgrading and improving infrastructure conditions.

In sharp contrast, the soft landing at the level of language and culture has significantly lagged behind (Rouvinski, 2024). Most Latin American countries designate Spanish or Portuguese as their official language, and in some areas, these co-exist with multiple indigenous languages, forming a complex multilingual ecology. Enterprises interacting with government agencies, financial institutions, labor unions, and communities must navigate multilayered linguistic regimes and historical memories. Colonial history, North–South asymmetries, and disputes over development models together constitute a deeply sedimented narrative distance, such that the same set of discourses—understood in China as “win–win cooperation” or “infrastructure-driven development”—may be interpreted by some Latin American social groups as new dependency or resource extraction, sowing seeds of potential cognitive conflict (Janna, 2025).

Research in international business and cross-cultural management has long shown that

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language is not a neutral communication tool, but deeply embedded in organizational power structures, trust relations, and knowledge flows (Brannen et al., 2014). Choices of language and differences in language proficiency subtly shape who is entitled to speak, who controls information, and who is excluded from decision-making cores. For Chinese enterprises venturing into Latin America, such asymmetries at the linguistic level can aggregate into systemic risks across multiple links, including contract negotiations, compliance communication, internal management, and external public opinion.

Despite this, domestic studies on Chinese enterprises “going global” still tend to subsume linguistic and cultural factors under soft skills or localization, often remaining at the level of exhortations such as “attach importance” or “strengthen”, without developing an analytical framework embedded within enterprise risk management systems. Particularly in the Latin American context, policy reports and academic works often use broad categories like “political risk” or “social risk” to describe phenomena such as community protests, media controversies, and contractual disputes, rarely examining to what extent these are triggered or amplified by linguistic misalignment, narrative collisions, or cultural misinterpretation (Atlantic Council, 2024).

Simultaneously, machine translation, large language models (LLMs), and other intelligent technologies are rapidly proliferating in cross-linguistic communication. On the one hand, they significantly reduce cross-language communication costs and provide technical support for SMEs going global with leaner configurations. On the other hand, they generate new sources of risk, such as overreliance on automatic translation, diffusion of algorithmic bias, and lack of rigorous human review of critical texts. Preventing techno-optimism in solving language problems from sliding into a paradox where technologies amplify risk is becoming a shared managerial and industry challenge.

Against this backdrop, this article seeks to address three core questions:

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RQ1: How can the linguistic and cultural issues encountered by Chinese enterprises in Latin America be abstracted from scattered phenomena into identifiable and classifiable linguistic–cultural risks?

RQ2: How can we construct a risk map with both explanatory power and operational value that presents the logic of risk generation and evolution through the lens of distance–rupture–bridging?

RQ3: In an era of rapidly developing data-intelligent technologies, how can we design a governance mechanism for linguistic–cultural risk that balances technological capabilities with organizational governance?

1.2 Clarification of Core Concepts and Research Questions

To avoid conceptual conflation and theoretical vagueness, this article clarifies several key concepts.

First, linguistic–cultural risk. This is defined as the composite set of risks in cross-border operations whereby language differences, mismatched discursive conventions and cultural cognitive biases lead to information distortion, erosion of trust, flawed decision-making and reputational damage (Brannen et al., 2014; Tenzer et al., 2014). Compared with traditional political risk or legal risk, linguistic–cultural risk is both a distinct category and highly coupled with other types of risk: it often plays the role of an amplifier or trigger embedded in political events, compliance disputes and social conflicts (Harzing & Pudelko, 2013).

Second, distance. Rather than understanding distance simply as quantifiable linguistic distance or scores on cultural dimensions, this article distinguishes three interwoven dimensions:

Linguistic distance: differences between the enterprise's dominant language and the

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host-country language in terms of structure, domains of use and symbolic status (Dow & Karunaratna, 2006);

Distance in cultural memory: differences in the long-term narrative practices within the two societies concerning history, development models and the image of the Other (Shenkar, 2001; Zaheer et al., 2012);

Cognitive–narrative distance: differences in how media, elite discourse and policy documents frame the meaning of cooperation projects (Ocasio et al., 2015).

Third, data-intelligent governance mechanism. This is understood as a comprehensive governance arrangement that takes data and intelligent algorithms as its foundation and organizational processes and institutional arrangements as its carriers (Mikalef & Gupta, 2021). It encompasses not only technical components such as terminology management, translation and revision, and discourse monitoring, but also institutional design elements such as language strategy formulation, allocation of responsibilities and cross-departmental coordination (Piekkari et al., 2014).

2. Theoretical Foundations: From Distance to Rupture

2.1 Language in International Business: From Tool to Structure

In Early research in international business tended to treat language as a neutral instrument for transmitting information, focusing mainly on the impact of language proficiency on negotiation efficiency and communication costs. As multinational corporations have become more networked, teams more diverse, and global value chains more complex, language has gradually shifted from being an ancillary variable to an important lens for analysing organizational structures and power relations (Brannen et al., 2014).

On the one hand, when firms choose a corporate language and a working language, they are in fact delineating who is central and who is peripheral (Piekkari et al., 2014). Those

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who command the dominant language are more likely to influence agenda-setting and to control the interpretation of information (Neeley et al., 2012). On the other hand, translation practices in multilingual environments are not a neutral intermediary, but a critical site where informational content and affective tone may be reshaped (Pym, 2025). In the Latin American context, the movement between Spanish/Portuguese and English or Chinese involves not only lexical equivalence, but also issues of political sensitivity, politeness strategies and social identity, among many other factors.

Therefore, a view of language as merely a communication tool is no longer sufficient to explain the complexities of cross-border business operations. This article argues that it is necessary to introduce a language risk perspective into research on language in international business, and to regard language as a structural factor that may lead to information distortion, power imbalances and erosion of trust (Tenzer et al., 2014).

2.2 Language Risk: Conceptual Evolution and Typology

In terms of conceptual evolution, language risk first appeared mainly in legal and compliance contexts, referring primarily to legal risks arising from vague contractual wording or divergent understandings of clauses. With the development of research on cross-border team collaboration and global supply chains, the meaning of language risk has gradually expanded to encompass internal communication, knowledge transfer, team conflict and leadership, among other domains (Harzing & Pudelko, 2013).

Synthesizing existing studies, language risk can at least be divided into the following categories:

Institutional–compliance risk: misinterpretation of laws, standards and policy documents that may result in incomplete compliance or misjudgement of regulatory red lines (Salacuse, 2003);

Organizational–coordination risk: significantly increased coordination costs

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between departments and regions—and even decision-making delays—caused by differences in language proficiency, information asymmetries or translation errors (Tenzer & Pudelko, 2017);

Market–narrative risk: misreading of brand names, advertising slogans and corporate narratives in the target society, triggering media controversies, public outcry or boycotts;

Data–algorithmic risk: overreliance on the outputs of machine translation and large language models, in the absence of rigorous human review and local contextual judgement, leading to severe mistranslations or ambiguities in sensitive settings (Vieira et al., 2021; Asscher & Glikson, 2023).

These types of risk often intersect in real-world situations and are difficult to identify separately in advance. To incorporate them into a systematic risk management framework, it is necessary to construct a higher-order analytical model capable of encompassing the above-mentioned risk types.

2.3 Linguistic–Cultural Specificities and Structural Distance in the Latin American Context

Compared with other regions, Latin America exhibits several linguistic–cultural features that merit special attention:

First, there is a coexistence of relative surface-level linguistic unity and deep-level diversity. At the level of official languages, Spanish and Portuguese cover the vast majority of countries, which appears to lower the linguistic threshold for cross-border deployment by enterprises. At the level of deep practice, however, countries differ significantly in phonology, vocabulary, register and discursive conventions, and many states maintain indigenous languages in important positions within judicial, educational and community spheres, resulting in a configuration of surface unity and deep diversity (Lipski, 2008). Over 400 distinct indigenous languages thrive in Latin America today, with languages such as Quechua, Guaraní, and Nahuatl holding official status in several countries (Mar-Molinero, 2000).

Second, there are pronounced tensions between historical memory and development narratives. Colonial history, Cold War memories and global North–South relations make Latin American societies highly sensitive to foreign capital and major power involvement (Lasso, 2007; Quijano, 2000). In such a context, expressions such as win–win cooperation and community of shared future, which are viewed as positive terms within the Chinese discursive system, may be perceived by some Latin American audiences as requiring more contextualized explanation in order not to be equated with the rhetoric of previous external actors.

Third, there is a marked gap between elite discourse and popular public opinion. In government documents and high-level dialogues, diplomatic rhetoric and economic–trade cooperation discourse are often highly professionalized, whereas at the community level, on social media and among grassroots organizations, discussion around specific projects tends to focus on employment, the environment, land and cultural identity. If enterprises confine themselves to technical communication at the elite level while neglecting the broader arena of public opinion, they are prone to producing a situation in which communication appears smooth at the top but fractured at the grassroots in linguistic–cultural terms.

Under the influence of these features, Chinese enterprises in Latin America face a multidimensional form of distance: not only visible linguistic distance (West & Graham, 2004), but also implicit distances in historical memory and narrative frameworks. Only by fully revealing the structural significance of these distances at the theoretical level can we further explain the recurrent communicative ruptures observed in practice.

3. Constructing a Linguistic–Cultural Risk Map: The Distance–Rupture–Bridging Analytical Framework

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This study is primarily a theory-building and framework-design inquiry. Rather than estimating or predicting risks through quantitative modelling, it seeks to construct a conceptual map and a governance model of linguistic–cultural risk in Chinese enterprises' engagement with Latin America. The aim is to clarify how risks emerge, how they evolve, and how they can be governed, instead of measuring their statistical frequency or probability.

3.1 Risk Dimensions and Situational Typology

To systematize the complex and diverse forms of linguistic–cultural risk, this article constructs the basic dimensions of a risk map from three angles: situation–actor–consequence. This logic is compatible with mainstream enterprise risk management frameworks, which similarly start from contexts/events, risk owners and impact profiles, and thereby facilitates integration of linguistic–cultural risk into existing risk registers.

Situational dimension: this includes policy communication (interactions with governments and regulatory bodies), business negotiation (interactions with partners and suppliers), community communication (interactions with local residents and social organizations), and media narratives (interactions with traditional media and social media platforms), among others. In practice, these situations differ in stakes, time pressure and public visibility: policy communication and major negotiations tend to be high-stakes and low-tolerance for error, whereas community interaction and social media exchanges are often more frequent and diffuse but can rapidly escalate into reputational crises.

Actor dimension: this includes headquarters management, local subsidiary teams, local partners, professional language service providers and intelligent language tools. Each actor occupies a distinct position in the information and decision chain: headquarters teams often control strategic narratives and contractual language; local subsidiaries and partners mediate those narratives on the ground; language professionals and intelligent tools handle textual and oral mediation; and regulators, media and communities react to the resulting actions and messages. Mapping who speaks, who translates, who approves and who bears responsibility is thus a precondition for attributing and managing risk.

Consequence dimension: this ranges from the informational level (misunderstandings, delays in information flow), to the relational level (erosion of trust, escalation of conflict), and up to the institutional level (compliance failures, project obstruction). Informational consequences are often the earliest and easiest to detect (e.g. repeated clarification emails, inconsistent documents); relational consequences are reflected in deteriorating cooperation climates, increased reliance on back channels, or growing scepticism among stakeholders; institutional consequences involve formal sanctions, investigations or project suspensions, and are typically where linguistic–cultural risk fully materializes as political, legal or financial loss.

On this basis, linguistic–cultural risks can be grouped into several core categories, such as misinterpretation of institutional documents, internal communication rupture, misalignment of public narratives, and amplified mis-translation through algorithms. These categories cut across situations and actors—for example, misinterpretation of regulatory texts may involve headquarters legal teams, local counsel and external translators, while public narrative misalignment may centre on marketing departments, PR agencies and online influencers. The typology therefore lays the groundwork for subsequent cartographic representation and for aligning linguistic–cultural risk with existing operational and legal risk domains.

An important refinement is to overlay the three forms of distance identified earlier—linguistic distance, distance in cultural memory and cognitive–narrative distance—onto the situation–actor–consequence grid. For instance, a relatively low linguistic distance but high narrative distance (as may occur between Chinese and Latin American actors communicating

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in English or Spanish) can still generate severe misunderstandings in the framing of development, environment or sovereignty. Conversely, high linguistic distance combined with dense networks of trusted intermediaries may produce fewer ruptures than one would expect from macro-level indicators alone. This multi-layered mapping helps to avoid simplistic assumptions that more distance automatically translates into more risk, and instead directs attention to the specific configurations of distance, actors and situations that are most hazardous.

3.2 Distance–Rupture–Bridging: The Dynamic Pathway of Risk Generation

Building on the risk map, this article introduces the distance–rupture–bridging framework to model dynamically the generation and evolution of linguistic–cultural risk. This framework complements static measures of cultural or linguistic distance commonly used in international business research (West & Graham, 2004; Dow & Karunaratna, 2006) by explicitly tracing how latent differences translate into observable incidents over time.

Distance stage

At the initial stages of project launch or market entry, there exist multiple latent distances between the enterprise and the host country, including differences in language use habits, historical memories, discursive frames and value orientations. These distances may not be salient in day-to-day interactions, where goodwill and routine procedures can temporarily mask misunderstandings. Yet, as macro-level studies on language distance and FDI or trade volatility suggest (Ly et al., 2018; Tenzer et al., 2017), such structural misalignments reduce the margin for error and make shocks more likely to propagate across borders. In the Latin American setting, for example, legacies of colonialism and dependency (Quijano, 2000) may colour how terms like development or modernization are heard, even when no overt disagreement is voiced at the outset.

Rupture stage

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When confronted with high-intensity situations—such as major negotiations, project approvals, emergencies or public opinion crises—latent distances may, through a specific trigger, transform into manifest ruptures. Triggers can be lexical (a term whose legal meaning differs in the two systems), symbolic (images or slogans linked to traumatic memories), procedural (perceived bypassing of customary consultation channels), or technological (a machine-translated statement that inadvertently conveys disrespect). At this point, linguistic–cultural risk shifts from a static background condition to a dynamic event: actors experience a breakdown in mutual intelligibility, begin to question each other's intentions, and may mobilize legal or political resources to defend their positions.

From a managerial perspective, the rupture stage corresponds to incident detection and first response in risk management. Precisely because the root causes lie in long-standing distances, ad hoc PR statements or simple clarifications often fail to fully restore trust. The framework therefore encourages managers to treat ruptures as symptoms of deeper misalignment rather than isolated communication errors.

Bridging stage

In the face of an already manifest rupture, enterprises can pursue bridging through multiple pathways. Social forms of bridging include bringing in professional language and cultural mediators, re-opening channels of dialogue with community leaders, or revising contractual language in ways that acknowledge local concerns (Pym, 2025). Technological forms of bridging involve using discourse and public opinion monitoring, sentiment analysis and corpus tracing to gauge how messages are being received across different linguistic communities, and to adjust subsequent communication accordingly. Recent advances in cross-lingual sentiment analysis and multimodal monitoring of social media (Vilares et al., 2017) highlight both the potential and the challenges of this strategy: while it is possible to track issue salience and affect across languages, preserving fine-grained cultural nuances

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remains difficult.

The distance–rupture–bridging framework thus elevates linguistic–cultural risk from a series of isolated incidents to a traceable evolutionary trajectory. It links macro-level structures (historical narratives, linguistic systems) with meso-level organizational choices (language policies, staffing, reliance on technology) and micro-level events (specific misunderstandings, tweets or press conferences). By making these linkages explicit, the framework helps enterprises undertake risk anticipation at the front end—asking where do our distances lie, and under what conditions might they turn into ruptures?—and experience-based review at the back end—asking which bridging strategies worked, for whom, and why?.

3.3 Conceptual Approach to Constructing a Linguistic–Cultural Risk Map

The linguistic–cultural risk map proposed in this study is not generated through large-scale data mining or algorithmic modelling. Instead, it is derived from a structured qualitative synthesis of existing academic research, policy reports and publicly documented cases. Through iterative comparison and abstraction, recurrent patterns of situations, triggers, linguistic manifestations and consequences are identified and organized into an analytical framework. The map therefore functions as a theory-driven interpretive device, rather than as a statistically predictive tool. Based on the above framework, this article proposes a general approach to constructing a linguistic–cultural risk map for Chinese enterprises expanding into Latin America.

Clarifying dimensions and designing a coding framework

Drawing on a comprehensive review of existing research, policy reports and publicly available cases, the study distils basic coding units such as situation, actor, triggering event, linguistic manifestation, type of distance and consequence. Each unit is operationalized through a set of indicators: for instance, situation may be coded by formality level, time pressure and audience scope; linguistic manifestation by the presence of contested terms,

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silence, hedging or emotional expressions; and distance type by references to history, identity or institutional norms. A transparent coding manual helps ensure inter-coder reliability and enables comparisons across countries and sectors.

Classifying and abstracting event materials

Instances of linguistic–cultural conflict found in news reports, interview data and enterprises' internal summaries are classified, not by detailing the specific firms and projects involved, but by abstracting them into a set of event templates, such as semantic ambiguity in contract clauses → dispute over responsibility, omission of sensitive clauses in translation → regulatory suspicion, and brand naming evokes cultural associations → public opinion storm. This strategy is consistent with best practices in legal and compliance-oriented language risk assessment, which seek to identify recurring patterns of vulnerability without exposing confidential firm-level information.

Linking templates to distance and governance variables

Each event template is then linked back to the underlying distances and governance arrangements: Which forms of distance were salient? Which actors were involved? Was there a language policy or terminology system in place? Were intelligent language tools used, and if so, how? This relational coding makes it possible to see whether certain combinations—for example, high narrative distance plus heavy reliance on raw machine translation in community communication—systematically correlate with more severe consequences.

Visual representation of the risk map

Nodes in the map are constructed along the axes of situation–trigger–form of rupture–consequence, while edges are constructed around types of distance and bridging strategies, thereby producing a visualized risk spectrum (Aven, 2016; Hollnagel et al., 2015). This map does not aim to provide precise numerical probabilities of risk, but rather serves as a cognitive tool for enterprises to identify potential risks and design governance mechanisms.

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In practice, such maps can be embedded into digital dashboards (Fraser & Simkins, 2021) that integrate real-time data—e.g. media sentiment indicators or internal incident reports—so that managers can track whether the organization is moving closer to or further from known risk patterns.

In this way, linguistic–cultural risk ceases to be an elusive and ill-defined notion. Instead, it can be systematically presented in the form of a map, connected to concrete organizational variables, and incorporated into enterprises' risk discussions and decision-making processes. While the proposed data-intelligent governance framework offers a systematic way to manage linguistic–cultural risk, its practical implementation is subject to several constraints. These include the financial and organizational costs of building language infrastructure, the difficulty of cross-departmental coordination, and the limitations of current AI tools in handling multilingual and culturally sensitive contexts, especially in the highly diverse linguistic environment of Latin America. These constraints suggest that the framework should be understood as a guiding architecture rather than a turnkey solution, and that its application will require contextual adaptation and gradual organizational learning.

4. Data-Intelligent Governance Mechanisms: From Ad Hoc Translation to Embedded Language Governance

4.1 Intelligent Language Services: A New Infrastructure for Risk Governance

Against the backdrop of the rapid development of generative artificial intelligence and large language models (Bommasani et al., 2021; Zhao et al., 2023), intelligent language services are evolving from auxiliary tools into a form of core infrastructure for enterprises going global. National and regional initiatives to build intelligent language service platforms—such as language resource centres for Belt and Road languages and programmes in digital and intelligent language services in South China—explicitly frame language

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technologies as part of the basic infrastructure for international cooperation and trade.

For Chinese firms expanding into Latin America, technologies such as machine translation, intelligent writing, and speech recognition and synthesis can, to some extent, alleviate language gaps and enhance communication efficiency. They lower entry barriers for small and medium-sized enterprises, allow rapid generation of multilingual drafts and support 24/7 monitoring of diverse information sources.

However, if these technologies are viewed merely as faster and cheaper substitutes for translation, while issues such as training corpora, algorithmic bias and sensitivity to context are ignored, new linguistic–cultural risks are likely to accumulate imperceptibly. Recent work on cross-lingual analytics shows that model performance varies widely across languages and domains (Adelani et al., 2021), and that subtle shifts in sentiment or politeness are especially hard to capture. In Latin America, where national and regional varieties of Spanish and Portuguese co-exist with indigenous languages and hybrid online registers, domain mismatch between training data and actual usage can easily lead to misreadings of public opinion or misphrasings of sensitive statements.

Moreover, as industry practice in legal and financial translation warns, even small inaccuracies in wording can have outsized legal effects; language risk in contracts and regulatory filings is increasingly recognized as a form of operational and legal risk requiring proactive control (Cao, 2007; Pym, 2025). In this context, relying uncritically on GenAI outputs in high-stakes settings—without robust human review and clear allocation of responsibility—effectively shifts risk from visible labour costs to less visible but potentially much larger compliance and reputational losses.

Therefore, this article argues that intelligent language services should be incorporated into enterprises' overall risk governance architecture, with their functional role clearly defined at each stage of identification–assessment–early warning–intervention–review, rather

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than being simply outsourced to external vendors or relegated to isolated technical departments. The key is to treat intelligent language services not as stand-alone apps, but as socio-technical systems (Orlikowski & Scott, 2008) whose design, usage rules and oversight mechanisms are themselves objects of governance.

4.2 A Closed-Loop Governance Mechanism of Identification–Assessment–Early Warning–Intervention–Review

Building on the linguistic–cultural risk map, this article proposes the following data-intelligent closed-loop governance mechanism:

Risk identification

By means of multilingual corpus construction, cross-lingual sentiment analysis and discourse pattern recognition, enterprises can continuously monitor policy texts, media reports and discussions on social platforms, identify potential sensitive issues and risk triggers, and provide early-warning signals for upstream decision-making. In the Latin American context, this may involve tracking debates on infrastructure, environment, labour rights or sovereignty across Spanish- and Portuguese-language media, as well as monitoring how Chinese projects are framed in comparison with those of other foreign actors. Advances in cross-lingual and multimodal sentiment analysis (Vilares et al., 2017)—combining text, images and videos—offer promising tools for such monitoring, while also underlining the importance of human validation in ambiguous or culturally charged cases.

Risk assessment

Drawing on the risk map, internal assessment sheets can be developed which, by combining event type, actors involved and possible consequences, categorize the levels of linguistic–cultural risk across different projects and communicative scenarios, and thereby support contingency planning at high, medium and low levels. Such sheets can be aligned with overall enterprise risk matrices and can include both inherent risk (based on distance indicators, stakeholder complexity and issue sensitivity) and residual risk (after taking existing governance measures into account). Systematic language risk assessment frameworks in the translation and legal sectors already provide examples of how such scoring can be implemented in practice (Pym, 2025).

Risk early warning

At critical junctures when public opinion is rapidly intensifying or negotiations have reached an impasse, automated public-opinion monitoring tools and multilingual discourse analysis models can be deployed to track sentiment trends and issue evolution in real time, thereby providing timely and actionable information for management. For example, alerts can be generated when negative sentiment around a project exceeds a predetermined threshold, when certain keywords associated with protest or litigation begin to cluster, or when discrepancies emerge between official narratives and grassroots discourse. Early-warning outputs should be routed not only to PR teams, but also to legal, compliance and local management units, so that responses can be coordinated rather than fragmented.

Risk intervention

At the technical level, terminology management, sensitive-word screening, multi-version comparison and human–machine collaborative review can be used to improve the semantic precision and cultural appropriateness of key texts. Shared multilingual terminology bases—covering legal, financial, technical and socio-political terms—can reduce ambiguity and support consistent framing across documents and platforms. At the organizational level, positions such as language-and-culture advisor or localization coordinator can be established to strengthen cross-departmental coordination and local embeddedness. These roles should have clear mandates, direct access to decision-makers and the authority to halt or revise communication that poses unacceptable risk.

Risk review

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Linguistic–cultural conflict incidents that have already occurred can be systematically reviewed, converted into structured cases, and used to update the risk map and refine assessment indicators, thereby enabling enterprises to deepen their understanding of the Latin American context and enhance their response capacity through ongoing learning. Review procedures should document not only what went wrong at the surface level (e.g. a problematic phrase), but also which distances, organizational blind spots and technological limitations contributed to the incident (Vanmassenhove et al., 2021; Savoldi et al., 2021). Lessons learned can then feed back into training, tool selection, terminology policies and stakeholder engagement strategies.

This closed-loop mechanism emphasizes translations that can be verified, algorithms that can be explained, and processes that can be traced. At the level of translations, there should be clear sources of reference and version histories; at the algorithmic level, interpretable rules and threshold settings; at the process level, well-defined chains of responsibility and review mechanisms. Together, these features serve to enhance the transparency and controllability of overall governance, and to align intelligent language services with broader regulatory expectations around algorithmic accountability and data governance (Wachter et al., 2017).

4.3 Organizational Embedding and Governance Scenarios: From Translation Posts to Language Governance Units

For the above mechanisms to be effectively implemented, organizational structures and process design are crucial. At least the following modes of embedding can be considered:

Strategic level

Linguistic–cultural risk should be incorporated into the enterprise's overall risk management framework, with a dedicated linguistic–cultural risk module established alongside political risk and legal risk, and special assessments conducted prior to major

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investment decisions. Board-level risk committees and senior management should receive regular briefings on linguistic–cultural risk exposure in key markets, and performance indicators—such as the frequency and severity of language-related incidents—can be included in enterprise-wide risk dashboards (Fraser & Simkins, 2021).

Functional level

At headquarters or regional hubs, cross-departmental language and culture governance groups can be created, bringing together representatives from legal affairs, public affairs, human resources, local subsidiaries and language service professionals, thus breaking the isolation of traditional translation departments (Piekkari et al., 2014). These groups can oversee language policy development, approve major terminology decisions, coordinate training plans and supervise the procurement and evaluation of intelligent language tools. Their remit should explicitly include Latin American markets, where the interplay of language, politics and social contestation is particularly pronounced.

Project level

For major projects, a clearly designated language governance lead can be appointed to coordinate translation resources, terminology management, local media communication and community engagement, ensuring a healthy interaction between technological tools and human judgement. Project-level language governance plans can specify which documents and interactions require mandatory human review, which can rely on machine assistance, and how feedback from local stakeholders will be collected and acted upon. This helps to avoid the common situation in which language tasks are informally assigned to whoever speaks some Spanish without clear recognition, support or authority.

Cooperation level

Long-term partnerships can be established with professional language service providers, local universities and research institutes. Through joint R&D, multilingual corpus

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sharing and talent-training initiatives, enterprises can elevate their case-based experience into reusable knowledge assets. In recent years, Chinese and Latin American institutions have begun to explore intelligent language service cooperation under broader Belt and Road and South–South frameworks; connecting corporate practices with these emerging platforms can help both sides co-develop standards, tools and curricula that respond to real-world risk governance needs.

Through such forms of organizational embedding, linguistic–cultural risk governance no longer relies on a handful of employees who know foreign languages or on ad hoc outsourcing. Instead, it becomes a systemic capability that runs through the entire process of strategy formulation, project implementation and brand building. More importantly, it creates the institutional space in which data-intelligent tools and human expertise can be combined in a principled way—leveraging automation for scale and speed, while reserving critical judgement and responsibility for human actors who understand both the Latin American context and the broader strategic interests of Chinese enterprises.

5. Discussion

Returning to the three research questions posed in the introduction, this section discusses how the article responds to each in turn, and situates these responses in the broader literature on language in international business, linguistic security and intelligent language services.

5.1 Addressing RQ1: From Scattered Phenomena to a Distinct Category of Linguistic–Cultural Risk

The first research question asks how the linguistic and cultural issues encountered by Chinese enterprises in Latin America can be abstracted from scattered phenomena into identifiable and classifiable linguistic–cultural risks.

Existing research on language in international business has convincingly shown that

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language is not a neutral conduit but a structural factor that shapes power, identity and knowledge flows in multinational corporations. Feely and Harzing's work on language barriers, for example, demonstrates how language choices affect HQ–subsidiary relations, status hierarchies and information asymmetries (Feely & Harzing, 2003; Harzing & Feely, 2008). More recent syntheses highlight the multifaceted role of language across strategy, organization and performance (Tenzer, Terjesen & Harzing, 2017), yet they still treat language issues as a broad analytical background rather than as a distinct category of risk.

This article advances the debate in three ways. First, it elevates linguistic–cultural factors from a diffuse background condition to an independent risk category. By defining linguistic–cultural risk as a composite of information distortion, trust erosion, decision failures and reputational damage caused by language differences, discursive misalignment and cultural misperception, the article renders language analytically commensurable with political, legal and financial risk. This resonates with emerging Chinese scholarship on linguistic security in trade and the Belt and Road, which similarly argues that language-related threats are often more concealed yet no less consequential than traditional economic or geopolitical risks (Li, 2015).

Second, the typology of four interrelated risk domains—institutional–compliance, organizational–coordination, market–narrative and data–algorithmic risk—provides a structured lens through which phenomena that are usually treated separately can be analysed together. In existing work, contract misinterpretation, internal communication breakdowns and branding mishaps are often studied in different sub-fields; here they are reassembled as manifestations of a common underlying mechanism: the ways in which language and culture mediate meanings, expectations and responsibilities. This responds directly to the first research question by offering a coherent vocabulary and set of categories that managers and researchers can use to name and compare linguistic–cultural risks across cases.

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Third, by embedding the notion of distance into the definition of risk—distinguishing linguistic distance, distance in cultural memory and cognitive–narrative distance—the article links micro-level communicative events to macro-level structures of history and discourse. While quantitative research on linguistic distance has documented its impact on FDI stocks, trade flows and entry modes (Dow & Karunaratna, 2006; Melitz & Toubal, 2014; Selmier & Oh, 2013), it says relatively little about how those distances are experienced in day-to-day interactions. The tripartite conceptualization proposed here thus complements metric-based approaches with a qualitatively grounded account of how distance is enacted and felt in concrete interactions.

Taken together, these moves transform linguistic–cultural issues from soft background noise into a clearly delineated, multi-dimensional risk category. Conceptually, they answer RQ1 by showing that linguistic–cultural risk can be identified, classified and linked to existing risk management frameworks without collapsing into generic culture or communication problems.

5.2 Addressing RQ2: The Distance–Rupture–Bridging Model as a Dynamic Risk Map

The second research question asks how a risk map with both explanatory power and operational value can be constructed, using the distance–rupture–bridging lens to capture the dynamics of risk generation and evolution.

Language-related studies in international business have long recognised that distance matters, yet they have often treated distance as a static parameter: a given level of cultural or linguistic distance is assumed to increase transaction costs, uncertainty or the likelihood of failure (Beugelsdijk et al., 2018; Zaheer, Schomaker & Nachum, 2012). The distance–rupture–bridging framework proposed here adds a temporal and processual dimension that has been largely missing from this literature.

At the distance stage, the model foregrounds the layered, latent nature of risk.

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Linguistic distance, cultural-memory distance and cognitive–narrative distance do not automatically produce conflict; rather, they create a risk substrate that remains dormant until activated by specific triggers. In the Latin American context, this includes the historical and geopolitical sensitivities around external capital and the symbolic weight of certain terms or images that may appear innocuous from a Chinese perspective.

At the rupture stage, the model conceptualizes language-related incidents—such as a mistranslated clause, an unfortunate slogan or a misjudged social media interaction—not as isolated mistakes but as moments in which underlying distances suddenly crystallize into visible fractures. This is consistent with work that views cross-cultural misunderstandings as episodes of sensemaking breakdown in multinational collaboration (Weick, 1995; Tomlinson & Egan, 2002), but the model goes further by specifying the mechanisms through which rupture emerges from accumulated distance in high-pressure contexts such as negotiation, regulatory review or crisis communication.

At the bridging stage, the framework incorporates both social and technological forms of repair: from the role of interpreters, local advisors and community leaders as human mediators to the use of discourse monitoring, sentiment analysis and corpus-based diagnostics as data-intelligent tools. This move is closely aligned with recent calls in Chinese policy and academic circles to build multilingual risk case libraries, early-warning mechanisms and rapid-response systems for language security in Belt and Road settings (Ning, 2020).

Methodologically, the coding scheme and visualization logic outlined in Section III show how the model can be turned into a practical risk map: nodes structured by situation–trigger–rupture–consequence, and edges annotated by distance types and bridging strategies. Rather than estimating precise probabilities, the map serves as a cognitive and organizational device that allows managers to see how potential risk trajectories might unfold, and where

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intervention points might lie. In this sense, the article answers RQ2 by demonstrating that the distance–rupture–bridging triad is not only a descriptive metaphor but a workable architecture for mapping and anticipating linguistic–cultural risk.

5.3 Addressing RQ3: Balancing Technological and Organizational Governance in the Data-Intelligent Era

The third research question concerns the design of governance mechanisms that balance technological capacities with organizational arrangements in managing linguistic–cultural risk.

In the GenAI era, the temptation to treat intelligent language services as a universal solution to language problems is strong. Yet emerging research on translation ethics, intelligent emergency language services and AI-assisted language industries repeatedly warns that automation can create new forms of risk—ranging from bias and hallucination to opaque decision pathways and accountability gaps—if it is not embedded in robust governance structures (Moorkens, 2020; Martindale & Carpuat, 2018; Hagendorff, 2020).

This article contributes by relocating intelligent language services from the periphery of tools to the centre of risk governance architecture. The closed-loop mechanism of identification–assessment–early warning–intervention–review operationalizes this shift along three lines:

First, it assigns diagnostic functions to data-intelligent tools. Multilingual corpora, cross-lingual sentiment analysis and discourse-pattern recognition are positioned as instruments for scanning policy shifts, media climates and online debates in real time—particularly important in Latin America's highly mediatized and politicized public sphere.

Second, it embeds control and safeguard mechanisms in the use of GenAI. Terminology management, sensitive-term filtering, multi-version comparison and human–machine collaborative review function as brakes against the uncritical adoption of machine output in high-stakes domains such as contracts, financial disclosures or crisis statements.

Third, it links organizational design to technological capabilities through the creation of language-and-culture governance units at strategic, functional, project and cooperation levels. This mirrors broader discussions of language management maturity in Chinese debates on Belt and Road enterprises, where the presence of formal language policies, regular audits and dedicated roles is seen as a key indicator of a firm's ability to cope with linguistic–cultural risk.

By weaving these elements together, the article answers RQ3 with a clear proposition: intelligent language services can reduce risk only when they are treated as infrastructure, governed through explicit rules, roles and review processes; when treated as stand-alone tools, they are as likely to amplify risk as to mitigate it.

5.4 Implications for the Language Services Industry and Foreign Language Education

The re-conceptualization of linguistic–cultural risk also has broader implications beyond corporate governance. For the language services industry, the analysis suggests a shift from translation processing to risk-oriented language governance. In line with Chinese policy documents that call for building national language security systems and comprehensive language-service chains for foreign trade[1], providers can develop region- and sector-specific risk diagnostics, narrative consulting and multilingual reputation management services, rather than competing solely on speed and price.

For foreign language education—especially in Spanish and Portuguese programmes—the article points towards a curricular triad of language competence + risk literacy + data-

[1] National Language Commission. (2016). 国家语言文字事业“十三五”发展规划[The 13th Five-Year Plan for the Development of National Language and Script Affairs]. 北京[Beijing].
State Council. (2007). 关于加快发展现代服务业的若干意见[Several Opinions on Accelerating the Development of Modern Service Industries]. 北京[Beijing].
Ministry of Education & National Language Commission. (2020). 国家语言文字事业“十四五”发展规划 [The 14th Five-Year Plan for the Development of National Language and Script Affairs]. 北京[Beijing].

intelligent tool literacy. Recent proposals for intelligent language service education highlight the need to combine CAT/MT training, corpus skills and project management with legal, ethical and policy awareness (Bowker & Buitrago Ciro, 2019; Kenny & Doherty, 2014; Mellinger & Hanson, 2017). Building on this, the Latin American case underscores the importance of integrating modules on linguistic–cultural risk, narrative contestation, and AI-assisted monitoring into language and business curricula. Graduates who understand how language interacts with law, regulation, media and technology will be better positioned to serve as language governance professionals for enterprises going global.

In sum, the discussion section has clarified how the article's conceptual and practical proposals speak directly to the three guiding research questions, while connecting them to ongoing debates in international business, linguistic security and the evolving ecosystem of intelligent language services.

6. Conclusion

This article set out to explore how linguistic–cultural risk can be conceptualized, mapped and governed in the context of Chinese enterprises' expansion into Latin America. Building on the preceding analysis, this conclusion explicitly revisits the three research questions and outlines a multi-layered agenda for future work.

6.1 Main Answers to the Three Research Questions

First, regarding how to abstract linguistic and cultural issues from scattered phenomena into identifiable and classifiable risks, the article proposes linguistic–cultural risk as a distinct category that is analytically parallel to political or legal risk yet deeply entangled with them. It defines this category in terms of four interrelated domains—institutional–compliance, organizational–coordination, market–narrative and data–algorithmic risk—and anchors them in three types of distance: linguistic distance, distance in cultural memory and cognitive–narrative distance. This provides both scholars and practitioners with a structured

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vocabulary for diagnosing where and how language and culture become risk-bearing in cross-border operations, particularly in the sensitive and historically loaded Latin American context.

Second, with respect to constructing a risk map that captures the logic of risk generation and evolution, the article offers the distance–rupture–bridging framework as a dynamic model. In this model, latent distances constitute the background conditions of risk; ruptures mark moments when those distances turn into visible conflict under pressure; and bridging denotes the array of social and technological responses through which enterprises attempt to repair relationships and re-stabilize meaning. The corresponding mapping approach—based on situation–actor–trigger–rupture–consequence nodes and distance/bridging-labelled edges—translates this model into a visual and analytic tool that can guide anticipatory risk assessment, scenario planning and ex post learning.

Third, concerning the design of governance mechanisms that balance technological and organizational dimensions, the article argues for treating intelligent language services as data-intelligent infrastructure embedded in a closed-loop mechanism of identification–assessment–early warning–intervention–review. It specifies how multilingual corpora, sentiment analysis and discourse monitoring can be harnessed for early detection; how terminology systems, sensitive-term filters and human–machine review can raise the reliability of critical texts; and how dedicated governance units and cross-departmental committees can institutionalize responsibility for linguistic–cultural risk. In so doing, it offers a concrete blueprint for aligning emerging GenAI-based tools with existing enterprise risk management and compliance systems.

Taken together, these answers suggest that language and culture are neither marginal soft issues nor intractable black boxes, but governable domains that can be made visible, mapped and managed—provided that organizations adopt the right conceptual and institutional lenses.

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6.2 Limitations

Notwithstanding these contributions, the study has several limitations that should be acknowledged.

First, the analysis is primarily conceptual and exploratory. While it draws on a range of academic literature, policy documents and public reports on Chinese enterprises in Latin America and on Belt and Road linguistic security, it does not systematically test the proposed typology or framework against large-scale empirical data.

Second, the Latin American focus, though deliberate and analytically rich, may limit the generalizability of some insights. The historical experience of colonialism, the strong presence of Spanish and Portuguese as lingua francas, and the region's vibrant protest and media cultures combine to produce specific patterns of narrative contestation that may differ from those in, for example, Southeast Asia or Eastern Europe. The distance–rupture–bridging model may need recalibration when applied to regions where linguistic diversity, institutional environments or geopolitical dynamics follow different logics.

Third, the discussion of intelligent language services necessarily rests on a moving technological target. As large language models evolve in capability, accessibility and regulation, the balance between automation and human oversight will shift. The governance mechanisms recommended here should therefore be understood as principle-based rather than technology-specific and will need updating in step with advances in GenAI and evolving norms around algorithmic transparency and data protection.

6.3 Future Research Agenda

Building on these limitations, future research can proceed along several interrelated lines.

(1) Event databases and mixed-method risk modelling.

One priority is to construct a cross-country, cross-industry database of linguistic–

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cultural risk events involving Chinese enterprises in Latin America and beyond. Such a database could code events along the dimensions proposed in this article (distance types, triggers, rupture forms, consequences, bridging strategies), enabling both qualitative comparative analysis and quantitative modelling of risk trajectories. Combining process tracing with methods such as event history analysis or fuzzy-set QCA would help to identify which combinations of distance and contextual factors are most likely to produce serious ruptures, and which bridging strategies are most effective under what conditions.

(2) Longitudinal studies of intelligent language services in practice.

A second avenue involves in-depth, longitudinal case studies of how particular firms implement intelligent language services over time: which tools they adopt, how workflows evolve, how responsibilities are negotiated and how incidents are reviewed. Ethnographic observation of multilingual project teams, combined with log data from translation platforms and sentiment-monitoring systems, could reveal the micro-dynamics of human–machine collaboration in risk-sensitive scenarios. This would not only test the feasibility of the closed-loop mechanism proposed here, but also illuminate the organizational learning processes through which language governance capabilities are built—or undermined.

(3) Comparative research across investing countries and host regions.

Third, comparative work could juxtapose Chinese enterprises with firms from other major investing countries (e.g., Spain, the United States, Brazil) in their approaches to linguistic–cultural risk in Latin America. Are there systematic differences in how these firms frame distance, anticipate rupture and design bridging strategies? Do home-country language regimes, corporate languages or prior colonial ties shape their governance practices? Similarly, cross-regional comparisons—e.g., between Latin America, Africa and Central Asia—could clarify which aspects of the distance–rupture–bridging framework are globally robust and which are region-specific.

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(4) Integrating linguistic–cultural risk into policy and education.

Fourth, future research might explore how national and regional policies, as well as university curricula, can incorporate the notion of linguistic–cultural risk more explicitly. For instance, studies could examine how language-security strategies for the Belt and Road, language-service development reports and urban language governance policies translate into concrete support for enterprises and training programmes.

This would help to connect micro-level corporate practices with macro-level efforts to build language-service platforms, risk case libraries and intelligent language-education systems.

(5) Normative and ethical dimensions of GenAI-mediated language governance.

Finally, more work is needed on the normative implications of delegating parts of linguistic–cultural governance to GenAI. Questions of fairness, bias, accountability and transparency—already pressing in emergency language services and public-sector translation—acquire additional weight in corporate settings where decisions can affect livelihoods, environmental outcomes and community relations.

Future research could therefore combine ethical analysis with experimental and survey-based studies of stakeholder trust in AI-mediated communication, particularly in contested or high-stakes projects.

Ultimately, the core message of this article is that linguistic–cultural risk is neither an inevitable cost of doing business abroad nor a purely technical nuisance to be fixed by better translators or more powerful algorithms. It is a structurally produced and historically conditioned field of vulnerability and possibility, in which meanings, identities and power relations are constantly negotiated. By conceptualizing this field through the lenses of distance, rupture and bridging, mapping its contours and proposing concrete governance mechanisms, the study aims to provide both a theoretical scaffold and a practical roadmap for

Chinese enterprises facing the opportunities and frictions of Latin America—and, by extension, for the evolving ecosystem of language services and foreign language education that supports them.

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Framing Power, Making Meaning: Rethinking Metaphor Translation in Contemporary Chinese Political Discourse

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Abstract

Political metaphor has become one of the quiet engines of official Chinese rhetoric. It does not simply decorate policy language. It helps organise legitimacy, compress history into portable formulas, and project a future oriented moral horizon. Once translated, however, these metaphors enter a different ecology of reading, where the cues that make them persuasive at home may not be available, or may be read through quite different ideological expectations. This paper reviews scholarship on metaphor translation in contemporary Chinese political discourse and argues that a significant strand of this work has tended to frame translation as technical transfer rather than as public negotiation. Bringing functionalist, cognitive and discourse-oriented traditions into dialogue, the review foregrounds reception as the missing hinge between strategy and effect. Across the literature and a small set of emblematic cases drawn from widely circulated official translations, five recurring tensions are traced: semantic density, cultural embeddedness, strategic ambiguity, institutional constraint and reception drift. These tensions show why common strategies such as abstraction, elaboration and standardisation are never neutral fixes. They reshape what the metaphor can do, and for whom it can do it. The research therefore reframes political metaphor translation as a contested event of meaning making, situated at the intersection of language, ideology and global politics.
Keywords: Chinese political discourse, cross cultural communication, discourse strategy, ideological framing, audience reception, metaphor translation

1. Introduction

Metaphor does not merely embellish contemporary Chinese political discourse. In

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many flagship formulations it functions as a kind of organising grammar, holding together policy, memory and aspiration. Figurative language has moved from rhetorical flourish to a recurring method of state narration, where images of journey, renewal, struggle and harmony are asked to carry ideological weight as well as affective appeal. In the Xi era, this metaphorical repertoire has become especially visible, folding cultural inheritance into policy expression and lending coherence to narratives of national renewal (Tian et al., 2021). The point is not only what these metaphors say, but what they make thinkable about China's trajectory.

The translation problem begins when such expressions travel. Phrases like “人类命运共同体” (a community with a shared future for mankind) (Xi, 2022), or “中国式现代化” (Chinese style modernisation) (Xi, 2022), can look transparent on the page, and their English versions often read with a surface smoothness that suggests equivalence. Yet their persuasive force is rarely lexical. They rest on thick symbolic layers, from philosophical sediment to policy genre conventions, and they often rely on strategically maintained ambiguity (Chen, 2024). When rendered for international audiences, the same metaphor may gain clarity at the cost of resonance, or preserve resonance at the cost of interpretive stability. What appears as a neat solution can therefore become a subtle shift in stance, alignment and reader positioning (Wang & Munday, 2020).

Existing scholarship offers powerful tools for thinking about these shifts, although it tends to do so in separate lanes. Functionalist traditions highlight communicative purpose, institutional readability and the demands of the target situation (Vermeer, 2021; Nord, 2018). Cognitive perspectives, drawing on Conceptual Metaphor Theory, focus on cross lingual mapping and the extent to which conceptual structures travel with the metaphor (Kövecses, 2020; Musolff, 2022). Discourse oriented approaches, often informed by critical discourse analysis, attend to how metaphor participates in power, legitimisation and the management of

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public meaning (Fairclough, 2015; Chilton & Ilyin, 2019). Each illuminates part of the problem. The difficulty is that political metaphor translation rarely stays within one frame.

One area, however, has remained conspicuously thin: reception. The question is not only how metaphors are translated, but what happens once the translated metaphor is released into circulation. Who reads it, in what media environments, and with what prior assumptions about China and its political vocabulary? Liu et al. (2025), for instance, show how readers may rely less on literal accuracy than on familiar interpretive habits when judging whether a political metaphor feels plausible. Related reception work suggests that a translation can be technically competent yet pragmatically unstable, precisely because it lands in an audience space the source text never had to negotiate. Reception, in short, is where strategy becomes consequence.

This review takes that reception turn seriously, but it does so without assuming that one approach can simply replace the others. Instead, it reads across functionalist, cognitive and discourse-based work, asking what each can contribute once we treat metaphor translation as a situated decision under institutional and ideological pressure. The goal is not to police a single correct rendering, but to clarify what different strategies do to the metaphor's semantic contour, its ideological signal and its uptake conditions.

Five tensions recur across the discussion: semantic density, cultural embeddedness, strategic ambiguity, institutional constraint and reception drift. These are not abstract categories. They name the points at which translators are forced to choose between competing goods, such as clarity and ambiguity, domestication and estrangement, or fluency and traceability.

What is proposed here is therefore not a recipe for better metaphor translation. The claim is diagnostic. Political metaphor translation is treated as a contested event in which meaning, legitimacy and audience positioning are negotiated in public. The empirical

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illustrations are used to show how strategies such as abstraction, elaboration and genre-based standardisation do not simply solve problems. They reconfigure what the metaphor can do, and for whom. That is also why reception is not an afterthought in this paper, but part of the metaphor's political life.

2. Theoretical Background

2.1 Political metaphor in discourse

It is easy to speak about political metaphor as if it were a stylistic layer, detachable from the "real" argument. The problem is that political discourse rarely grants us that separation. Metaphor often arrives early, sometimes before anything like an explicit claim appears, and it quietly sets the limits of what can count as a sensible claim. That is why political metaphors can sound ordinary and still matter. Their ordinariness is not innocence. It is training.

Take the navigation frame. Few readers pause over steering the ship of state or charting a new course, because the phrasing has become almost infrastructural. Yet those images smuggle in a whole arrangement of political agency. Someone is presumed to see farther than others. Someone is expected to hold the wheel. Collective life becomes a movement that must stay "on track", and once that track is naturalised, dissent can be re imagined as obstruction while alternatives begin to look like drift. The persuasive move is not necessarily emotional. It is often procedural, a rearrangement of what feels reasonable.

Scholars who study metaphor in this context often point to its capacity to shape not only ideas but also the ground on which ideas can be received. That shaping is not always direct. It may emerge through resonance, or through repetition, or through a kind of familiarity that resists scrutiny (Charteris-Black, 2011). The political effect, then, may lie as much in what becomes unsayable as in what is said (Musolff, 2022).

Lakoff and Johnson (2008) made it difficult to keep metaphor confined to ornament by insisting that metaphor belongs to cognition, not merely to rhetoric. If a metaphor organises how politics is thought, then it is not simply dressing policy language. It is shaping the reasoning routes that a discourse makes available. Yet the cognitive account becomes thin if it is treated as culturally weightless.

Later developments added further texture. Musolff's (2016, 2022) work on metaphor scenarios matters here because it shows how metaphors bring patterned expectations, almost a narrative grammar, and those patterns are never purely formal. They are historical, and cultural. They can misfire, not because the words are unclear, but because the scenario's moral cues are not shared (Chilton, 2004).

These general points become sharper when the discourse itself is institutionally stabilised. Official Chinese political language is a case where metaphor does not merely occur, it is cultivated. Formulations recur across genres with a steadiness that can feel like governance speaking in images. Many phrases draw on long standing cultural resources, but those resources do not always travel with the words. A simple image, taken at face value, can carry philosophical sediment and institutional cadence that fluent English cannot automatically preserve (Zhou, 2023; Xu, 2024).

Translation, then, is not simply a matter of choosing between equivalence and deviation. What moves across languages is a bundle of associations, some tightly anchored to source discourse, others more portable, and some that seem portable only if the stance subtly shifts. Loss is routine, which makes the real question less moral than diagnostic. Which loss changes what the metaphor can do in public, and which loss merely thins the texture. A metaphor can remain recognisable as a phrase while its political work is quietly re-distributed.

2.2 Chinese political metaphor in the Xi Era

Metaphor has long been present in Chinese political discourse, but its institutional rhythm becomes more pronounced in the Xi era. Figurative formulations recur across

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speeches, white papers, and state media with a steadiness that makes them feel less like occasional flourish and more like a governing idiom.

The surface compactness of many Xi era metaphors can mislead. They often look economical, yet they compress a great deal of historical and ideological material. “中国梦”, often rendered as The Chinese Dream (Xi, 2022), illustrates that compression. It gathers revolutionary memory, civilisational aspiration, and policy ambition into a portable formulation. Wu (2023) notes that the force of the metaphor is not produced by a simple borrowing of an English language idiom, but by the way it borrows recognisable shape while refusing the liberal moral horizon that the phrase might casually evoke. The metaphor can read as if it were convergent, and still do work that is deliberately not convergent.

A related difficulty appears when a formulation is legible in English but not genuinely transparent. Chen (2021), examining metaphorical phrases such as “人类命运共同体”, points to the way surface accessibility can conceal an inward facing political logic. The phrasing can be read with ease, while the ideological architecture it belongs to remains hard to perceive unless one already has the discursive map. In such cases, translation is not a simple choice between accuracy and inaccuracy. It becomes a judgement about which layer can be carried without flattening the formulation into something harmless, or redescribing it so strongly that it triggers an unintended reading.

Circulation matters as much as content. Song and Zhang (2024) suggest that Xi era metaphors often operate as constellations, reinforced across genres and time. A formulation can appear in a major speech, echo through provincial reporting, and resurface in diplomatic briefings. Authority accumulates through repetition. Translation therefore has to confront echo, not merely a sentence in isolation.

Metaphors also change function as they migrate. A formulation may move from one policy domain to another without shedding earlier resonances. That means translation must

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cope with layered use rather than a single stable meaning. Renderings such as”中国号巨轮”， commonly translated as the giant ship of China (Liu et al., 2025), can preserve the visible image while thinning the governance logic the metaphor animates. What slips away is often not propositional content but a structure of feeling, including implied coordination, managed momentum, and an expectation of directed movement.

This is also why the translational problem is institutional, not merely lexical. Jiang et al. (2022) emphasise that decisions about what to carry forward are rarely made alone. Editorial consensus, timing, precedent, and assumptions about what audiences will tolerate shape what becomes possible. Sun and Subramaniam (2023) describe translational judgement as intuitive but not casual, since translators respond to rhetorical expectations that are felt before they are articulated.

Nor do metaphors necessarily arrive at the translator as fresh inventions. Guo (2025) notes that political metaphors may undergo internal testing and iterative adjustments before public release. By the time a foreign language version is produced, the formulation has often been rehearsed, trimmed, and politically weighted. Translation works with a distilled message rather than a spontaneous figure of speech.

Zhang (2022) goes further, arguing that translated metaphors can function as instruments of projection. Tone and framing can shift with diplomatic purpose, geopolitical conditions, and anticipated reception. Translation in this setting is not an afterthought to politics, but part of political communication itself. The translator’s labour often resembles calibration, managing resonance, navigating ideological residue, and attempting to pre-empt misreading. In some cases, controlled ambiguity functions as shelter, allowing a metaphor to remain usable across interpretive environments that would otherwise pull it apart.

2.3 Translation approaches to metaphor

Work on political metaphor translation tends to cluster around a small set of approach

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families, yet the families do not line up neatly because they begin with different assumptions about what metaphor is doing. Some treat it primarily as an instrument of communicative effect, some as conceptual structure, and some as a form of ideological positioning embedded in discourse. None of these starting points is wrong, but each brings a different “problem” into view, and each makes a different kind of loss easier to tolerate.

Functionalist traditions take purpose and situational fit as their organising premise. Nord (2018), building on Skopos theory, places communicative goal at the centre of translational reasoning, which legitimises adaptation or omission where a metaphor risks confusion or mismatch with target audience expectations. The strength of this orientation is its clarity about audience and function. Its weakness is that it can treat metaphor as expendable once it threatens fluency, even when the metaphor is carrying stance, alignment, or institutional memory. Wang and Munday (2020) hint at this tension in official contexts, where decisions often look less like principled optimisation and more like incremental recalibration of tone and imagery.

Cognitive perspectives begin elsewhere, with the claim that metaphor belongs to reasoning rather than to decoration. Lakoff and Johnson (2008) and Kövecses (2020) frame metaphor as mapping between domains that shapes how political realities are perceived and evaluated. From this angle, a metaphor is not simply a rhetorical flourish that can be swapped out without consequence, because the metaphor may be doing conceptual work that the discourse relies on. The difficulty is that preservation can become an ideal that outruns context. Valdeón (2024) notes how formal fidelity can produce pragmatic confusion when readers lack the conceptual ground a metaphor presupposes. Yang (2023) therefore argues for selective preservation, weighing conceptual scaffolding against communicative clarity. What is at stake is not whether the source image survives intact, but whether the reasoning work remains legible without turning the target text into explanatory prose that disrupts the genre’s

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authority.

Discourse oriented approaches shift attention again by treating metaphor as a positioning device, part of how authority is legitimised and public meaning managed. Fairclough (2015) and Chilton and Ilyin (2019) treat political discourse as a site of power, within which metaphor participates in framing and contestation. Tianying and Bogoyavlenskaya (2023) likewise frame metaphor as part of the rhetorical field through which ideology circulates. Song and Zhang (2024) show how metaphors tied to rejuvenation or historical rise can be rephrased in translation to evoke inclusivity or balance, not as neutral stylistic adjustment but as stance management under imagined audience sensitivities. The usual concern raised about this family is not political insight but decision guidance: Wei (2018) notes that ideological effects become clearest in hindsight, while decisions are made in real time.

A shared premise still runs through these approaches despite their differences. Metaphor is a comparatively unstable object under translation. Shifts are expected, whether in structure, tone, or positioning. What remains harder to specify is how such shifts are to be evaluated when the same metaphor must serve communicative function, conceptual coherence, and ideological signalling at once.

A translated metaphor can look settled once it reads as fluent English, yet its interpretive life is only beginning. It enters media environments that were never part of the source text's rhetorical design, and readers bring priors that can do the heavy lifting. Under those conditions, drift is less an error than a predictable feature of circulation. The practical consequence is that reception is not simply "afterwards", because it shapes what later becomes normal or risky in official English.

3. Approaches in Practice

It is one thing to describe approach families as if they were stable tools laid out on a

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bench. It is another to watch what happens when a translator reaches for those tools while working inside official routines. Political metaphor does not present itself as a purely linguistic puzzle. It comes with timing, with precedent, with institutional memory, and with the persistent question of how an international reader will take a phrase once it leaves the protected space of domestic circulation. Under those conditions, approaches begin to look less like methods and more like habits of judgement. Each habit brings certain aspects of the problem into focus, and each habit has blind spots that only become obvious once the translator is already mid decision.

3.1 Functionalist reasoning

Functionalist thinking often survives in institutional translation not as an explicit theory that translators quote back to themselves, but as a quiet permission structure. Purpose matters, and audience matters. “What is this translation for” becomes the most defensible question to ask. Skopos theory formalised that orientation, and it is easy to see why it remains attractive (Vermeer, 2021; Nord, 2018). Yet the moment one enters party authorised discourse, the freedom implied by “purpose” contracts. The translator is rarely inventing the communicative goal. More often, the goal is assumed, inherited, or embedded in an established protocol.

That is where some of the most telling shifts occur. Wang and Munday (2020) show how metaphor is frequently made safer through thinning. A phrase like “筑梦之路”, for instance, is rendered as path to development (Wang & Munday, 2020). It reads fluently. It also reads as if it could have been written without the metaphor in the first place. The aspirational charge that makes the source formulation feel like a call, not merely a description, becomes harder to hear in English. One can call that domestication, or simplification, or strategic smoothing. Whatever label is preferred, the effect is the same: the metaphor’s affective register is quietly flattened.

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Wu's (2024) corpus based findings make it difficult to treat such flattening as occasional. Across government reports, metaphorical language appears regularly levelled into policy neutral vocabulary. The pattern is not chaotic. It is consistent enough to look like a house style. Clarity is gained, and clarity is rarely a trivial gain. Yet the gain invites an uneasy question that functionalist rhetoric sometimes avoids: at what point does legibility start to resemble compliance rather than communication.

Schäffner (2016) helps name what is at stake by warning that metaphors do not carry only "content". They also carry a medium, a way of organising value and alignment. In Xi era discourse, this point becomes sharper still. Brown (2022) argues that political metaphors in such texts function as compressed ideological signals. If that is right, then smoothing is never a neutral clean up. It can retexture the politics of the text, not simply its style.

What is striking, however, is how often functionalist work invokes an audience without really seeing it. Pan and Zhang (2022) are valuable precisely because they stop treating reception as an assumption. Their survey work suggests that simplification does not reliably generate understanding. A simplified rendering can be perceived as bland, or oddly opaque, or even suspicious, while literal renderings can sound technical and still fail to clarify. The functionalist promise, in other words, holds most comfortably when the audience is imagined. Once actual readers enter the picture, "purpose" becomes a contested variable rather than a stable instruction.

So the model remains useful, but it is easy for it to become reactive. It can encourage a kind of defensive pragmatism, where the safest phrasing wins by default. The deeper question keeps returning, and it is not a question functionalism can avoid forever: whose purpose is being served, and what is being paid for the appearance of fluency.

3.2 Cognitive approaches

Cognitive approaches begin from a premise that feels immediately relevant to

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metaphor translation: metaphor is not decoration. It is part of how political thinking is structured. Conceptual Metaphor Theory, as shaped by Lakoff and Johnson (2008), gives translators a language for taking metaphor seriously as conceptual infrastructure rather than rhetorical surface. It also tempts one toward a practical ideal. Preserve the mapping, keep the image, and carry the structure across.

Kövecses (2020) strengthens that temptation by emphasising how metaphors organise political and moral reasoning. Under this view, metaphors are not optional. They are formative. Translating them, then, can look like a kind of conceptual stewardship. Yet stewardship is harder than it sounds, because conceptual structure does not travel in a vacuum. One can preserve a frame formally and still lose the conditions that make the frame politically legible.

Liu et al. (2025) offer a useful illustration in their discussion of “中国号巨轮” (the giant ship of China), and in the English variants that circulate alongside it. The image survives in translation. The conceptual labour does not necessarily survive. Domestically, the ship metaphor can imply coordinated momentum, managed direction, and an authorised sense of navigation through turbulence. In English, the same wording can drift toward a generic maritime trope. It may even invite a literal reading that was never the point. The phrase travels, but the political cues that stabilise its scenario are not carried automatically by lexical fidelity.

The cognitive tradition is often excellent at showing what is preserved or lost in mapping terms. The difficulty arises when “preservation” is treated as the highest virtue. Structural fidelity can produce a translation that is formally loyal and pragmatically thin. The metaphor becomes recognisable but inert. Xi era metaphors, dense with inter text and governance cadence, are especially likely to expose this limitation. They can arrive intact in English and still fail to land, because landing is not a property of structure alone.

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3.3 Discourse oriented approaches

Discourse oriented work begins from a different intuition. It treats metaphor as a positioning device, embedded in institutional narratives and ideological scaffolding, rather than as an isolated linguistic artefact (Fairclough, 2015; Chilton & Ilyin, 2019). Under this lens, metaphors do not merely “mean”. They legitimise, they exclude, they normalise, and they organise who can speak with authority. Translation becomes an ideological encounter, even when it presents itself as technical.

Song and Zhang (2024), analysing official CPC commemorative texts, show how metaphors tied to rejuvenation or geopolitical confidence are recalibrated in English versions so that they project inclusion and harmony. That is not the same as mistranslation. It is closer to self-presentation under reception risk. Chen (2024), working with selections from Xi Jinping: The Governance of China (Volume IV), similarly observes attenuation in metaphors that carry sovereignty, security, or civilisational pride. The English becomes smoother, more compatible with the global governance lexicon, less likely to jar. The political effect is not necessarily to remove ideology, but to re stage it in a different key.

And yet, a familiar complaint follows. Eriksson (2019) is sharp on this point: discourse oriented studies are often strongest after the fact. They diagnose ideological movement with precision, but they struggle to offer operational guidance for decision making under pressure. In many accounts, the translator appears as an agent of discursive negotiation, but the practical parameters of negotiation remain abstract. One learns what a choice “did” once it has been made, not how to decide while the choice is still open.

There is also an additional complication that deserves more than a passing remark. Power is sometimes described as if it flowed in a single direction, from institution to translator to text. Yet the lived reality can be more granular. Translators may shade emphasis, adjust cadence, or embed cues within a mandated line, not as open resistance, but as micro

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judgement inside constraint. That does not romanticise agency. It simply recognises that institutional translation is rarely pure execution. It is an enacted practice, and enactment is always contingent.

3.4 Comparative insights

The three paradigms do not resolve into harmony. Each makes certain things visible. Each also makes certain losses easier to tolerate.

Functionalist reasoning tends to privilege legibility, and in doing so it can trade away metaphor's symbolic density. Cognitive approaches defend conceptual structure, but they can underestimate how quickly a preserved image becomes pragmatically thin once the shared scenario falls away. Discourse oriented work exposes ideological repositioning with real acuity, yet it often remains methodologically light at the moment where a practitioner most needs it: the moment of decision.

What looks missing is not "another theory". It is a workable way of moving across lenses without turning hybridity into an excuse for vagueness. Zhang et al. (2025) offer a composite framework that invites translators to assess metaphor along intersecting lines such as typology, context, and anticipated reception. It is a promising gesture, because it treats the translator as an interpreter of narrative risk rather than as a faithful executor of any single model. At the same time, Schäffner (2016) reminds us that institutional practice can shape how far such composite thinking can actually be enacted, since institutional positioning and reader inference are not neutral background conditions.

The harder problem, then, is not invention but evidence. There are still too few studies that track hybrid decisions under operational pressure, and fewer still that trace how those choices are received by real audiences rather than projected ones. In Xi era discourse that absence is consequential, because many metaphors in these texts are not primarily about picturing an image. They encode aspiration, stage legitimacy, and manage alignment.

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Translating them becomes a performance in which fidelity and political imagination sit uncomfortably together. One can sense why translators reach for multiple lenses, and why none of those lenses, on its own, can carry the whole weight.

4. Translational Strategies in Practice

When metaphor enters policy discourse and then has to do work as global rhetoric, translation rarely follows neat theoretical lines. The work is untidy, shaped by institutional mandate, expectations of international legibility, and the quiet weight of editorial precedent. Strategy becomes a repertoire assembled under pressure, often pulled from prior solutions rather than derived from a single, stable model.

One recurrent move is rhetorical recalibration. Instead of stripping metaphor into flat literalism, translators may keep a recognisable argumentative frame while shifting tone, evaluative colour, or register. Song and Zhang (2024), reading the English version of the CPC's centenary address, show how metaphors rooted in struggle and mobilisation are frequently retuned so that continuity and inclusion come forward more strongly than martial intensity. The choice is interpretive rather than incidental. It seeks to preserve ideological intelligibility without provoking ideological fatigue among global readers.

Example 1 (rhetorical recalibration).

Chinese: 打响改革攻坚战 (Xi, 2022).

English (official translation): *We have carried out critical tasks and enhanced top level design for reform*. (Xi, 2022).

The Chinese line frames reform as a battle, invoking mobilisation and sacrifice. The English keeps urgency, but routes it through task language and a vocabulary of governance. The war image retreats, and with it some of the emotional temperature the source formulation carries.

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Another familiar tendency is abstraction. Where a metaphor depends on culturally saturated embodiment, translators may shift from image to function, keeping the direction of the claim while changing the figurative vehicle. In anti- corruption discourse, for instance, phrases that evoke self-cutting, self-scraping, or turning the blade inward are often rendered as calls for self-reform or internal rectification. The imagery recedes, but the evaluative stance is kept. Mussad (2022) describes this kind of risk minded move as judgement about likely interpretive consequences, not only about semantic fit.

Elaboration appears as a third pattern, especially where short metaphor clusters compress several policy ideas into a tight sequence. Translators sometimes unpack that compression in English, not to abandon metaphor, but to stabilise the intended progression. Reform sequences built from deep waters, hard bones, and dangerous shallows, for example, are often translated with added verbs and abstract nouns so that the chain reads as escalating difficulty rather than as a collage of images. In Zhou and Tang's (2022) account, this sort of controlled expansion preserves direction while making the logic legible for readers who do not share the source genre's compression habits.

Example 2 (elaboration and imagery retention).

Chinese: 冲破思想观念束缚，突破利益固化藩篱 (Xi, 2022).

English (official translation): *We have broken the shackles of stale thinking and torn down barriers erected by vested interests*. (Xi, 2022).

The Chinese original uses two compact metaphors, one of constraint and one of enclosure. The English keeps both images, but supplies concrete nouns and verbs that make the sequence read as action, and it adds stale and vested to steer evaluation. Vividness is retained, yet the rhythm of the four character clusters is remade into a narrative sentence.

Metaphor treatment also varies across state authored genres. A single expression may circulate through speeches, policy reports, and white papers, yet its English rendering can shift depending on the genre's implied readership. In a leader's speech, metaphor can be allowed to sound like metaphor, because performative force is part of the event. In a policy report, the same line is more likely to be standardized into an administratively smooth register. This helps explain why stable formulae, such as community with a shared future, can appear remarkably consistent across documents even when their Chinese prompts remain context sensitive. Genre functions as a constraint that quietly selects what kinds of figurative meaning are treated as communicatively permissible, a point also emphasised by Wu (2024).

The same repertoire looks different when these moves are placed side by side. Table 1 maps recurrent strategy patterns against the structural pressures they answer, and shows how each strategy also generates its own secondary problems.

Table 1 Translational strategy patterns and the pressures they address.

Strategy pattern	What changes in the English	Typical pressure addressed	Risk it creates	Theoretical alignment
Rhetorical recalibration	Keeps an underlying frame while moderating tone and evaluative colour	Avoids overcharged or militant overtones while maintaining coherence	May flatten affect and reduce historical texture	Discourse sensitive modulation
Abstraction through paraphrase	Replaces culture bound imagery with governance lexicon or process language	Prevents exoticism or misreading of embodied imagery	May thin the metaphor and weaken memorability	Functionalist reasoning
Elaborative framing	Expands compressed clusters into a readable progression of difficulty or purpose	Improves accessibility when a metaphor bundles multiple claims	May over-determine meaning and narrow ambiguity	Cognitive scaffolding
Genre	Stabilises formulae	Maintains	Can detach a	Contextual

sensitive modulation	across official genres despite local variation	institutional consistency and recognisable policy wording	line from its situated rhetorical event	pragmatic hybridity

Even with clear patterns, the work itself rarely unfolds as a clean application of theory. Translators often describe it as a sequence of micro judgements responding to constraints that are sometimes explicit, such as house style or politically preferred wording, and sometimes tacit, such as anticipations about how particular images are likely to be heard in Anglophone public debate. The practical effect is that strategy is often assembled from precedent and institutional memory rather than derived from a single theoretical commitment.

Chen (2024), also examining metaphor in Xi Jinping: The Governance of China (Volume IV), shows how security related metaphors can be retained at the level of frame while being domesticated in tone. In English, the line can still signal vigilance and firmness, yet the image is often routed through a vocabulary of governance, stability, and rule based order. These alterations do not mark inconsistency. They reveal a resource whose guiding question is not whether a metaphor is accurate in the abstract, but whether it will spread without triggering associations that distort the intended stance.

Translational decision making in political discourse is therefore anticipatory. It responds to semantic clarity, but also to circulation, drift, and the fact that a line will be read inside an ideological weather that the source text did not have to negotiate. Functionalist, cognitive, and discourse based frameworks offer useful scaffolds, but the practical work lies in calibrating a phrase so that it remains politically legible and rhetorically functional once dislocated from its original setting. Strategy and challenge are inseparable here: each choice answers a pressure, and each pressure becomes visible because a choice has to be made.

5. Key Translational Challenges in Xi-Era Political Discourse

Key translational challenges in Xi era political metaphor are rarely about finding an elegant English phrase. The more persistent difficulty lies in what the metaphor is doing inside the source discourse, and what it is likely to do once it is detached from that discourse and read elsewhere. Five pressures surface again and again in both the scholarly discussion and the institutional record: semantic density, cultural embeddedness, strategic ambiguity, institutional constraint, and reception drift. None is a defect in itself. Each names a point where the translator has to choose between competing goods, and where a choice that looks "reasonable" on the page can still reorganise the metaphor's political work.

5.1 Semantic density

Many headline formulations compress policy, evaluation, and stance into a short rhythm. When such compression is carried by a metaphor, the target text has to decide what to keep compact and what to unfold. A triadic structure, for instance, can stage escalating difficulty while also signalling a cultivated political temperament: courage, resolve, and controlled risk.

Example 3.

Chinese: 敢于突进深水区，敢于啃硬骨头，敢于涉险滩。 (Xi, 2022)

English (official translation): *We have had the courage to brave uncharted waters, take on tough problems, and navigate potential dangers*. (Xi, 2022)

The English keeps the movement and the escalation, but the rhetorical economy shifts. In Chinese, the repeated “敢于” pattern works like a drumbeat, turning a list into a posture. In English, the line reads more like narrative reporting, and the emotional compression loosens. That loosening is not automatically a loss, yet it does change how easily the metaphor can function as a rallying cue rather than a retrospective summary.

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5.2 Cultural embeddedness

Some metaphors draw on cultural lexicon that is neither purely literary nor purely every day. Terms can carry long genealogies, moral expectations, and genre memory, even when they look plain. “小康” (moderate prosperity) (Xi, 2022), for example, sits at the intersection of classical aspiration and modern policy vocabulary, and it resists being treated as a simple equivalent.

Example 4.

Chinese: 实现了小康这个中华民族的千年梦想。 (Xi, 2022)

English: *We have achieved moderate prosperity, the millennia-old dream of the Chinese nation.* (Xi, 2022)

“Moderate prosperity” is a defensible rendering, and it is also a revealing one. It conveys an outcome, but it cannot bring across the cultural normality the source term can carry for domestic readers, where the phrase can feel less like a slogan and more like an achieved moral threshold. To compensate, translations often add explanatory weight, as the English does here with “the millennia old dream”. The added explanation helps the line circulate, yet it also nudges the metaphor towards didactic framing, which may sit uneasily with the authoritative plainness expected of official English.

5.3 Strategic ambiguity

Political metaphors are rarely built to pin meaning down as tightly as possible. Quite often, their usefulness lies in certain looseness, a capacity to hold several audiences together without forcing them into one authorised interpretation. In Xi era discourse, ambition is often voiced through images that open interpretive space rather than close it, inviting readers to

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recognise a direction of travel without being handed a single, final reading.

Example 5.

Chinese: 实现中华民族伟大复兴的中国梦。 (Xi, 2022)

English: *Realize the Chinese Dream of the great rejuvenation of the Chinese nation*. (Xi, 2022)

The English keeps the central image, but the phrase “Chinese Dream” is never culturally neutral in Anglophone political memory. It can sound familiar while pulling readers toward an American frame of individual aspiration, which the source formulation does not actually endorse. At the same time, an overly explicit translation risks collapsing the productive vagueness that gives the metaphor its mobilising reach. The dilemma is not whether to be clear, but how much clarity a political metaphor can afford before it stops functioning as a shared horizon.

5.4 Institutional constraint

Even when a translator can see multiple plausible renderings, institutional translation rarely rewards variation. House style, precedent, and vetted phrasing act as an invisible architecture, encouraging consistency and discouraging rhetorical experimentation. That architecture is especially evident when a source metaphor carries combative colour that might travel badly in international media environments.

Example 6.

Chinese: 打响改革攻坚战。 (Xi, 2022)

English: *We have carried out critical tasks and enhanced top-level design for reform*. (Xi, 2022)

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The English removes the battle frame and replaces it with governance vocabulary. Something is gained: the line reads as administratively credible, and it avoids militarised overtones. Something is also reweighted: the mobilisation mood, which in Chinese can signal urgency and collective discipline, becomes managerial competence. This is a familiar institutional move, and it illustrates how constraint is not only about censorship or control. It is also about what kinds of rhetoric an institution is willing to license as “normal” English.

5.5 Reception drift

Once translated metaphors circulate internationally, they meet readers who approach Chinese political language with uneven prior knowledge and uneven trust. Under those conditions, drift is common. A formulation may be read as aspirational, empty, or strategically evasive, depending less on linguistic accuracy than on the interpretive habits a reader brings to it.

Example 7.

Chinese: 推动构建人类命运共同体。 (Xi, 2022)

English: *We have promoted the building of a community with a shared future for mankind.* (Xi, 2022)

“a community with a shared future for mankind”, is precisely a sort of phrase that can look smooth while remaining unstable in uptake. It borrows a universalist register that resembles multilateral diplomacy, and this can help it cross borders. Yet the same register can also invite scepticism from readers who treat official Chinese formulations as strategic messaging by default. Translation can reduce obvious misunderstanding, but it cannot fully govern the political suspicions that attach to a phrase once it becomes part of contested

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international discourse.

These challenges help explain why strategy in this domain rarely looks like the application of a single model. Semantic density pushes translators toward expansion, cultural embeddedness invites selective glossing or abstraction, ambiguity demands restraint, institutional constraint pressures standardisation, and reception drift keeps the whole enterprise provisional. Metaphor translation here is therefore best understood as calibration under pressure, where every "solution'" is also a redistribution of what the metaphor can plausibly do in public.

6. Future Directions

The concerns traced in this review are not only obstacles for translators. They press on a larger question about what translation is doing when political metaphor is involved. Once a metaphor is carried into another language, it is no longer protected by the domestic routines that made it sound self-evident. It has to live in other media environments and other ideological climates, where the same image may be taken as aspiration, euphemism, provocation, or simply as odd phrasing. So the point of the discussion that follows is not to offer a final model, but to sketch the kinds of work that now seem hard to avoid if metaphor translation research is to stay credible.

One repeatedly runs into theoretical insufficiency, though it is not a failure of any single tradition. Political metaphors operate at once as cognitive scaffolds, as ideological signals, and as practical instruments of persuasion. It is therefore more revealing to follow the overlaps and frictions between theories than to pledge allegiance to one. Some recent studies move in that direction by treating strategy as a situated choice rather than a technical operation (Jafarnezhad et al., 2023; Liu & Li, 2023). What becomes interesting, then, is not only how a metaphor is rendered, but what the choice suggests about a translator's reading of institutional risk, genre expectation, and imagined uptake.

A second implication concerns where the evidence sits. Much translation research still tends to stop at the text, or at the translator, even though political metaphors do not finish their work there. Once a formulation circulates, it meets new ideological priors and new interpretive shortcuts. It may sharpen, soften, or drift. That drift is not a marginal detail, because it is precisely where strategy becomes consequence. Digital corpora, reader-response methods, and platform analysis make it increasingly possible to observe reception rather than presuppose it. The more demanding claim is that reception ought to be treated as part of the translational event itself, not as a separate afterword.

This also has pedagogical and professional consequences. Neutrality in political translation is never complete, and the limits are not only linguistic. Editorial precedent, institutional protocols, and diplomatic timing delimit what can be said. Yet judgement still enters through tone, emphasis, and sometimes the decision to leave an image partially unsettled rather than over-clarified. Translator education, in other words, needs more than linguistic competence. It needs genre literacy, a feel for discourse strategy, and some capacity to anticipate how a metaphor may be heard once it leaves the source setting.

A further adjustment concerns perspective. Reception is still too often treated through an Anglophone lens, as if the relevant audience were singular. Contemporary Chinese political metaphors circulate far beyond that corridor, and they are read in Southeast Asian, African, Latin American, and Eastern European settings, each with distinct media logics and

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interpretive histories. Research that combines multilingual interviews, corpus work, and comparative media analysis would make those differences visible, and it would also show how metaphorical stability or instability becomes a diplomatic resource. A policy formula can be repeated consistently and still land unevenly, and that unevenness matters for how mutual intelligibility is built, or fails to be built.

Finally, method. Close reading and case analysis remain indispensable, particularly for tracing how a metaphor's semantic contour and ideological signal are reconfigured. But they are no longer sufficient on their own, given the scale of multilingual, multimodal circulation. What seems needed is a more cooperative methodological imagination: translation scholars working with cognitive researchers, media analysts, and data specialists to follow metaphors through texts, screens, and publics. If political metaphor has an afterlife, the study of its translation needs methods that can see that afterlife.

7. Conclusions

To translate metaphor in contemporary Chinese political discourse is to negotiate far more than lexical transfer. These metaphors often carry policy sequencing, moral address, and institutional memory, and none of that migrates automatically. Even small shifts can recalibrate affect and quietly alter the implied social contract of the line.

Seen this way, translation reads most plausibly as an event shaped by constraint and by anticipated reception. Strategy patterns such as rhetorical recalibration, abstraction, elaboration, and genre standardisation can be understood as responses to pressure, yet each response also generates its own vulnerabilities, including semantic thinning and interpretive drift. The same metaphor may therefore look stable as a repeating formula while shifting in political function as it circulates.

What the cases and the literature jointly make visible is a recurring structure of trade-offs: semantic density and cultural embeddedness press against international legibility, strategic ambiguity collides with institutional standardisation, and reception drift becomes the point at which strategy turns into political consequence. A reception-aware approach does not dilute theoretical synthesis. It puts it under stress. Keeping strategies and challenges in view at the same time makes it harder to treat metaphor translation in Xi era discourse as either a purely linguistic problem or a purely ideological one. It is a site where rhetoric, governance, and audience positioning meet, and where meaning is made through negotiation rather than delivered as a stable object.

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An Experimental Study of the Positive Transfer of Cantonese Rusheng Syllable Structures on Unreleased Stops in English

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Abstract

Accurate pronunciation is of great significance for all language learners. Syllables of Rusheng, a prominent feature of Cantonese tones, are ended by stops with no audible release /p̚/, /t̚/, and /k̚/, which is highly similar to the phenomenon of unreleased stops in English Consonant-Consonant linking. However, previous studies on stops in Cantonese and English focused on the onsets or codas stops in monosyllabic words or theoretically presumed the difficulties Cantonese EFL learners may encounter by analyzing the similarities and differences of vowels and consonants in Cantonese and English. Therefore, the author conducted an experiment among three language groups. The results identify that there is a positive transfer from Cantonese Rusheng on English unreleased stops in phrases or even sentences in natural speech.

Keywords: Cantonese, English, Rusheng syllable structures, unreleased stops, positive transfer

1. Introduction

1.1 Background and Significance

With the smooth progress of the Belt and Road Initiative, the ties between China and the rest of the world have been strengthened. The Guangdong-Hong Kong-Macao Greater

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Bay Area, an engine boosting trade, connectivity and dynamism between regions, is playing a more and more crucial role in the further reforming and opening-up blueprint of China.

Cantonese, a Chinese dialect widely spoken in both the Greater Bay Area and many overseas Chinese communities all over the world, has been spoken by 120 million people in China in 2013 (Chen, 2013). However, domestic studies concerning English and Cantonese mostly focus on English stress (Chen et al., 2021; Sui, 2020), pronunciation or intonation produced by Cantonese speakers (Shi, 2013; Zhang, 2016); some previous studies just generally summarized the similarities and differences of their vowels and consonants, then theoretically drew a conclusion about the difficulties Cantonese speakers may encounter when they learn English without solid proof (Chen, 2022; Mai & Quan, 2017).

Nowadays, English courses are required for Chinese students' compulsory education and higher education. However, due to the regional differences in dialects, educational resources and etc., students' English level, especially their pronunciation, varies. As Wang Chuming pointed out in his study Self-concept, English pronunciation and EFL learning, "although pronunciation is only part of the L2 learning task, performance on L2 pronunciation influences a learner's L2 achievement and judgement of his/her L2 learning ability" (Wang, 2004). Therefore, this study of language transfer between Chinese and English can contribute to the English teaching activities on phonetics, especially for Chinese English-as-a-Foreign-Language (EFL) learners. It could help improve their pronunciation so as to enhance their achievement and judgement of their English learning ability, and then improve learners' all-rounded abilities to listen, speak, read and write in English.

With China's increasingly stronger national power and rising international status, more and more expats choose to study and even settle in China. Meanwhile, according to the data on the official website, Confucius Institutes are spreading China's wisdom to 147 countries and regions throughout the world, carrying out colorful and fruitful teaching activities. The theories of language transfer and second language acquisition can also be applied to these expats' learning process of Chinese. Therefore, studying language transfer between Chinese and English can not only offer guidance to teachers' teaching but can also boost expats' enthusiasm and confidence in learning Chinese.

What's more, with its unique history and geographical advantages, the Guangdong-Hong Kong-Macao Greater Bay Area is playing an increasingly crucial role in China's blueprint for further reforming and opening up in the new era, while language is playing a vital part in both official visits, economic cooperation and people-to-people exchanges. As a native Cantonese majoring in English, I believe that studying the influence of Cantonese on learning English is of great significance for Cantonese EFL learners, helping them master English better, and carrying out more communication and cooperation with foreigners without language barriers and misunderstandings.

Moreover, official data indicate that over 40 million people in Guangdong province speak Cantonese, and many overseas Chinese in Southeast Asian countries also speak Cantonese as their mother tongue. But what is misaligned with such a population is that most domestic studies on English and Cantonese concentrate on stress, pronunciation or intonation. Previous research merely outlined the similarities and differences between their vowels and consonants and speculatively concluded the obstacles Cantonese speakers may face while learning English without concrete evidence.

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Under the previous studies of language transfer, this research aims to identify the positive transfer of the Cantonese Rusheng syllable structure on the unreleased stops in English by analyzing the production by Cantonese Chinese speakers, Mandarin Chinese speakers, and English native speakers through an experiment. The recordings of the participants will be edited and analyzed with the software Praat. After comparing the voice broad band spectrums of participants in these three language groups, conclusions will be drawn and suggestions will be made accordingly from several perspectives.

The findings of this paper can serve as a reference for Cantonese EFL learners, and also have certain theoretical values for second language acquisition research.

1.2 Literature Review

1.2.1 Cantonese tones Rusheng

Cantonese is a dialect widely spoken in Guangdong province. It preserves stops at the coda position in checked tones (as “入声”, “Rusheng” in Chinese) of ancient Chinese, which is considered as one of its most prominent features (Luo, 2016). The syllables of Rusheng characters are ended by unreleased stops /p̚/, /t̚/ and /k̚/ (Zhu, 2010).

There are four phases in the production of fully pronounced stops: The first phase is called the closure phase, in which the articulator or articulators move to form the stricture for the plosive. In the second phase, the hold phase, the air is compressed behind the stricture, which stops the air from escaping. We call the third phase the release phase, in which the articulators used to form the stricture are moved so as to allow air to escape. The fourth phase is what happens immediately after the third phase, so we will call it the post-release phase (Roach, 2008).

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The final stop consonants in Rusheng characters are pronounced half-way, which means they only have the closure phase and the hold one, but not the release and post-release phases.

1.2.2 Unreleased stops in English

When native speakers speak English, they arrange words into groups and join together the stressed and unstressed words within the group. This group is called sense-group, which consists of a few words in close grammatical connection (Raoch, 1962). Speakers can move smoothly from one word to the next without making any sudden pauses if the words belong to a same sense group. And this phenomenon of joining words together is called linking (Wang, 2002).

Liang sorted English linking into three types, Consonant-Vowel linking (C+V), Vowel-Vowel linking (V+V), and Consonant-Consonant linking (C+C). He pointed out that there are four types of Consonant-Consonant linking in English, i.e. incomplete plosions, nasal plosions, lateral plosions, and consonant clusters with same places of articulation (Liang, 2011). The current study will focus on the former three types which are in close connection with stops, because the fourth type only occurs when fricatives, nasals or semivowels are linked together.

If two words are linked together in one sense group, when the former one ends with a stop and the latter one begins with a stop or an affricate, to make smooth transitions in speech, the former final stop will become an unreleased stop, which means it has the closure phase and the hold phase, but not the release burst. The air compressed behind the stricture will be then released at the articulation place of the latter stop or affricate. And this is how speakers produce incomplete plosions.

When a word with a stop at the coda position is followed by a word with a nasal /n/ or /m/ as an onset in the same sense group, the stop will be unreleased and the air compressed behind the stricture will be then released through the nasal cavity. And this is what we called nasal plosions.

As for the lateral plosions, when a word ended with a stop is followed by a word beginning with a lateral /l/, instead of releasing the air at the articulation place of the stop, the air pressure during the stop will be released through the sides of the tongue (Liang, 2011).

1.2.3 Second language acquisition

In the 1960s and early 1970s, Contrastive Analysis (CA) Hypothesis put forward by Lado was extensively applied in the field of second language acquisition (SLA). He compared L1 and L2 in the aspects of grammar, pronunciation, etc. in his research, and claimed “those elements which are similar to native language will be simple for him, and those elements that are different will be difficult” (Lado, 1957). He pointed out that learners’ mother tongue may have both positive and negative effects on the language they are learning, the positive one is called positive transfer, while the negative one is negative transfer. And if a sound in L2 is similar to one in L1, learners may substitute the target sound with the sound from their source language.

Later, Selinker coined the terms “interlanguage” and “fossilization” and noted in 1972 that in a given situation, the utterances of a learner differ from those of a native speaker to convey an identical meaning. An interlanguage is what L2 learners may write or speak, which preserves some features of their mother tongue and expresses in L2 with its grammar, words, pronunciation, etc. of L2. L1 transfer, previous learning strategies, strategies of L2 acquisition, L2 communication strategies, and the overgeneralization of L2 language patterns are claimed to be several factors that shape the rules of interlanguage. An interlanguage can be used to examine a learner's knowledge of the pronunciation, grammar, vocabulary, and linguistic norms of L2 (Selinker, 1972).

Flege conducted an experiment, in which he compared the French /y/ and /u/ with the English /u/ produced by English speakers and French native speakers, and developed the hypothesis of Equivalence Classification and a theory that new sounds are easy to learn while the similar ones are hard (Flege, 1987).

In the current study, although Cantonese Rusheng codas function as phonemic, tone-bearing properties (Zhu, 2010), and English unreleased stops serve as non-phonemic, context-dependent allophones (Liang, 2011), they are considered to share identical articulatory gestures, both involving the closure and hold phases of the vocal tract while lacking the final release burst (Roach, 2008). Therefore, this study aims to investigate whether there is a transfer of the Cantonese speakers' physiological and psychological patterns from Cantonese coda stops to the production of English unreleased stops. According to Flege's theoretical framework, these structures would be categorized as similar sounds, which may cause difficulties to learners because of equivalence classification. However, due to the highly similar articulatory gestures and patterns mentioned above in these two languages, Cantonese English learners may benefit from their L1 habits when producing English unreleased stops in Consonant-Consonant linking rather than experience the interference predicted by SLM.

1.2.4 Studies on stops produced by Cantonese speakers

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As for domestic phonetics and phonological studies, Wang and Heuven have been exploring the intelligibility among speakers with different language backgrounds across borders, and identified several acoustic features of English vowels and obstruents produced by Chinese, Dutch, and American speakers (Wang, 2007; Wang & Heuven, 2015; Wang & Heuven, 2018; Wang & Heuven, 2019).

Some studies on English stops produced by Cantonese speakers discussed Cantonese negative transfer on English by error analysis, while others summarized the similarities and differences between Cantonese and English and concluded the positive and negative transfer of Cantonese Rusheng.

Jia conducted a series of experiments to analyze the errors of English monosyllabic voiceless plosive endings produced by Cantonese students and find them always too weak to be audible, which is claimed to be affected by the negative transfer of Cantonese (Jia, 2010).

With the software Praat, Zhou and Chen carried out an experiment on the stops at the onset position produced by Cantonese speakers. The result showed that participants tended to pronounce all the English stops in voiceless stops, which means they mistook the voiceless aspirated stops in Cantonese for English voiced stops (Zhou & Chen, 2015).

In 2017, Mai and Quan summarized Cantonese positive and negative transfer on English according to the features of these two languages. Speaking of the influence on English stops, they indicated that because of Cantonese Rusheng, Cantonese speakers can learn the stops with higher accuracy than Mandarin speakers from Northern China, but they may also ignore the final stops in English words due to the same reason (Mai & Quan, 2017).

In general, previous studies on stops produced by Cantonese-accented English

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speakers centered around stop onsets or endings in monosyllabic words but none of them studied stops in phrases or even sentences. And many studies on Cantonese transfer on English were inferred based on the characteristics of the two languages, instead of being confirmed with scientific experiments, so they are of neither universality nor objectivity.

1.3 Research Questions

Due to the high similarity of Cantonese Rusheng and English unreleased stops, the writer aims to identify if there is a positive transfer from Cantonese tones Rusheng on unreleased stops in English and to address the following questions in this research:

1. Is it true that Cantonese-accented speakers can produce unreleased stops in natural speech like English native speakers?
2. Is it true that Cantonese-accented speakers can produce unreleased stops in natural speech better than Mandarin ones?
3. If both yes, is it Cantonese Rusheng that causes this positive transfer on English unreleased stops?

What are the accurate frequencies of these unreleased stops /p̚/, / t̚/ and /k̚/ produced by Cantonese speakers? Which one can they pronounce with the highest accuracy and which one is the lowest?

To answer these questions, the writer will collect recordings from five Cantonese speakers, five Mandarin speakers from Northern China and two English native speakers for the sake of comparison, edit and analyze the voice broad band spectrums of these participants, and find out whether Cantonese Rusheng has positive transfer on English unreleased stops produced by Cantonese speakers.

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1.4 Hypothesis

According to the language transfer theory, the author assumes that syllables of Cantonese Rusheng syllable structures have positive transfer on English unreleased stops in linking. That is to say, when Cantonese speakers speak English in natural speech, they can link a word ended with a stop and a word began by another consonant with unreleased stops more naturally and accurately than Mandarin Chinese speakers, because of Cantonese Rusheng's feature, which is ended with unreleased stops /p̚/, / t̚/ and /k̚/.

2. Method

2.1 Subjects

To identify the influence of Cantonese tones on English unreleased stops, five Cantonese-accented English speakers from Guangdong province were recruited, with five other Mandarin Chinese speakers from Mandarin-speaking regions in China as a control group, who speak Mandarin varieties without the feature of Rusheng. In order to provide samples for evaluation, one English native speaker from the United States of America was also recorded. All speakers age from 18 to 55, in order to control the variables in the experiment. Non-native English speakers are students from a university in Shenzhen who have not majored in English and have not spent time in an English-speaking environment. Each group consisted of three speakers who had passed the CET-6 (College English Test Band 6) and two had passed the CET-4, which ensures comparable English proficiency between groups and the following observed performance in the current experiment could be attributed to L1 transfer effects.

2.1.1 Cantonese speakers

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Since the experiment is designed for identifying Cantonese impacts on Cantonese speakers' English pronunciation, Cantonese EFL learners are the subjects of this research. And three females and two males from the cities of Guangzhou and Foshan in the Greater Bay Area were recruited, aging from 18 to 23. According to their questionnaires, Cantonese is their native language and they have learned English for more than 12 years since primary school. These speakers are students of Shenzhen University majoring in History, Control Engineering, Network and New Media, Civil Engineering, and Spanish, who neither have no regular contact with English native speakers nor have no experience living in English-speaking countries. Mandarin is the language they usually speak when they are at school or talking with friends, while Cantonese is used at home.

2.1.2 Mandarin speakers

For comparison, there are two females and three males in the Mandarin group participating in this experiment, who age from 18 to 23. Four of them are from Beijing, Jilin province, Liaoning province and Shanxi province, the northern cities and provinces in China, where native people speak Mandarin or dialects without unreleased stops /p̚/, /t̚/ and /k̚/. Only one female comes from Kunming, Yunnan province, who speaks the Kunming dialect without unreleased codas /p̚/, /t̚/ and /k̚. These speakers are also students from Shenzhen University, majoring in Japanese, Electronic and Information Engineering, Communication Engineering, Journalism and Communication, Optoelectronic Information Science and Engineering, and Engineering Management. None of the Mandarin speakers have regular contact with English native speakers or spend time in an English-speaking environment. All of them speak Mandarin when having conversations with friends, at school and at home, but only some of

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them also speak dialects with their families.

2.1.3 English native speaker

Native English speaker can provide authentic samples of the pronunciations of the material in natural speech for the current study. Therefore, one male was invited to produce samples for this experiment. He is a teacher at the College of International Studies in Shenzhen University, who is 52 years old and comes from Michigan, USA. He has lived in China for 19 years but has little knowledge of Cantonese, which means his Cantonese proficiency would not have an impact on his English pronunciation.

2.2 Materials

The materials of this experiment can be divided into two groups, one is the Consonant-Vowel (CV) group, and the other is the Consonant-Consonant (CC) group. All the materials are meaningful phrases that make sense in grammar, and also be widely used in our daily life, so speakers can produce them fluently in natural speech. It is worth noting that coda stops are typically released in English, when followed by a vowel in linking contexts. Therefore, the CV group is designed as a control condition to test whether Cantonese unreleased coda stops in Rusheng syllable structures are blindly applied to inappropriate phonetic contexts. If Cantonese speakers achieve high accuracy in CV groups (i.e., releasing the stops in CV contexts), it may suggest that their production of unreleased stops in CC contexts is a selective move according to corresponding phonetic contexts and a positive transfer from their L1 feature.

To create a natural context for reading, materials in both groups are phrases with targeted stops /t/, /k/, or /p/, and speakers will produce them in the middle part of a fixed carrier sentence "I say ... again." All the materials are written on a paper sheet and shown to participants before recording.

In the CV group, each material is a verb phrase that begins with a verb ended with targeted stops /t/, /k/, or /p/, and ends with a preposition begun by a vowel (see Table 1).

Table 1 Word list of the CV group.

	/t/	/k/	/p/
/ʌ/	shut up	pack up	wrap up
/ɒ/	shout on	check on	step on
/æ/	shoot at	work at	keep at
/ɪ/	consist in	stick in	drop in

As for the CC group, materials are divided into three units according to the different types of plosions. As we mentioned above, Liang sorted Consonant-Consonant linking into four types, i.e. incomplete plosions, nasal plosions, lateral plosions, and consonant clusters with the same places of articulation. The current study focuses on the former three types which are in close connection with stops, because the fourth type only occurs when fricatives, nasals or semivowels are linked together.

In the unit of incomplete plosions, phrases are begun with the same word with one targeted sound /t/, /k/ or /p/ at the coda position respectively, and ended with a word with one targeted stop /t/, /k/ or /p/ at the onset position (see Table 2).

Table 2 Word list of incomplete plosions in the CC group.

Number	Phrase	Target	Number	Phrase	Target
T1	sport time	/t/	K2	drink coffee	/k/
T2	sport car	/t/	K3	drink please	/k/
T3	short pants	/t/	P1	keep talking	/p/
K1	drink tea	/k/	P2	keep calm	/p/

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			P3	keep promise	/p/

As for the unit of nasal plosions, phrases consist of a same word with one targeted sound /t/, /k/ or /p/ at the coda positions respectively, and a word with one targeted nasal /m/ or /n/ at the onset positions (see Table 3).

Lastly, phrases in the unit of lateral plosions start with a word with one targeted coda /t/, /k/ or /p/ respectively, and end with the word "light", which contains a lateral /l/ as its onset (see Table 4).

Table 3 Word list of nasal plosions in the CC group.

Number	Phrase	Target	Number	Phrase	Target
T4	hot milk	/t/	K5	dark night	/k/
T5	hot news	/t/	P4	stop me	/p/
K4	dark mood	/k/	P5	stop now	/p/

Table 4 Word list of lateral plosions in the CC group.

Number	Phrase	Target
T6	spot light	/t/
K6	dark light	/k/
P6	lamp light	/p/

2.3 Procedure

The experiment was conducted in the following procedures: (1) recruiting speakers, recording, filling out questionnaires; (2) processing recordings; (3) transcribing the recorded materials; (4) analyzing experimental data.

Firstly, Cantonese, Mandarin and English speakers that meet the requirement of the experiment were recruited with payment. Before recording, the reading list and its instruction[1] were shown to the participants for three to five minutes so that they could get enough knowledge of this experiment and the following procedures. Speakers were required to read each sentence only one time, or repeat the whole sentence if they need to correct what they've read. The whole process of sound recordings was carried out in a small and quiet room in the library in Shenzhen University, lasting for about three minutes each time. By using a Uniscom T3 recorder, the productions of participants were recorded and saved in wav. format. After recording, while the researcher checked the quality of the recordings, participants were required to fill out a questionnaire designed for collecting their personal information[2], i.e. gender, age, language background, birthplace, previous experience of English learning and etc. Lastly, speakers were allowed to leave after the recorded materials were saved and the questionnaires were fully filled.

Secondly, the sound files were transferred onto the computer and edited with the software Praat. The targeted phrases were cut out from each sentence and saved independently as another sound file, renamed in the format of "Language Participant Number_Targeted Phrase.wav" (eg., C1_sport time.wav means the recording of the phrase "sport time" produced by the first Cantonese speaker). There are 11 participants in this experiment, and each of them produced 30 sentences. Therefore, there are 330 sound files carrying target phrases in total.

Later on, the sound files with targeted phrases were analyzed with the software Praat. The voice broad band spectrums of the sounds can be viewed in Praat. Spike in the

[1] Please contact writers for the detailed reading list and its instruction applied in this experiment.
[2] Please contact writers for the questionnaire employed in this research.

spectrograms is one of the acoustic properties of stops, meaning the release burst of the air. On this premise, the writer listened to the sound files and viewed their spectrograms to see if there are spikes in the targeted places. Then, each piece of materials was transcribed into phonetic transcriptions and their spectrums were saved together in a table with the software Excel.

Lastly, results were analyzed according to different language groups and different types of plosions. The researcher calculated the accurate frequency of each targeted sound and had them shown in graphs. Furthermore, the results will be discussed in the following chapter.

3. Result Analyses

3.1 Production of English Coda Stops

The results are broken down by different groups of materials and different language groups so as to compare the production performances in different aspects among Cantonese, Mandarin, and English speakers. We collected 330 recorded materials, while 321 of them are valid. The overall accurate frequencies and accurate rates of the CV and CC group produced by participants in three language groups are shown in Table 5 and Table 6.

Table 5 The percentage of accuracy of English coda stops in the CV group produced by different language groups.

	Cantonese	Mandarin	English	Total
Frequency	50	51	11	112
Percentage	84.75	86.44	91.67	86.15

Table 6 The percentage of accuracy of English coda stops in the CC group produced by

different language groups.

	Cantonese	Mandarin	English	Total
Frequency	48	38	15	101
Percentage	57.83	42.7	83.33	53.16

Note. The statistics (X2 = 3.935, df = 1, p = 0.047) were calculated for the non-native English speaker groups to evaluate the influence caused by their L1.

From the tables above, we find that the general accurate rate of Consonant-Vowel linking, with a percentage of 86.15%, almost 33% higher than the Consonant-Consonant group.

In the CV group, the Cantonese and Mandarin groups contain 60 tokens respectively (5 speakers × 12 stimuli), while the English one contains 12. However, speaker C1 mispronounced the phrase “keep at” (/ki:p æt/) as [khi:p̚ k æt̚], while speaker M4 added a [t] after [drɒp] in the phrase “drop in”, which made these two pieces of recordings invalid. As for the accurate rates sorted by language groups, the English native speakers had the best performance, with an accurate rate of 91.67%, while the Cantonese and Mandarin ones were approximately 7% and 5% lower. Since the gap between the accuracy of Cantonese and Mandarin speakers produced in the CV group is only around 1.7%, the impacts of Cantonese Rusheng features on English Consonant-Vowel linking are not prominent, suggesting that Cantonese speakers do not overgeneralize the unreleased stops habit to the English CV phonetic contexts where a release is required. Consequently, this may indicate that their production of unreleased coda stops in English appears to be a context-sensitive positive transfer from L1 articulatory habits.

As for the CC group, there are 180 tokens in the Cantonese and Mandarin groups (2 groups × 5 speakers × 18 stimuli) and 18 in the English group, but only 190 of them are valid. In the Cantonese group, speaker C2 mispronounced the coda /k/ in “drink please” as [t] and the onset /l/ as [n] in phrases “spot light” and “dark light”, and added a [t] after “keep” in the phrase “keep calm”. Speaker C4 also pronounced /l/ as [n] in the three materials in the unit of lateral plosions. And the third speaker of the Mandarin group read the phrase “stop me” as “stop you”. Speaking of the accuracy broken down by speaker group, the English native speakers also crowned the best performance with an accurate rate of 83.33%, followed by the Cantonese speakers, 57.83%, while the Mandarin group is the lowest one, with only 42.7%, around 41% lower than the English one. To objectively evaluate the influence of L1 transfer for Mandarin and Cantonese speakers, a weighted Chi-square test was performed. The results yielded X2 = 3.935, df = 1, p = 0.047, indicating a statistically significant difference between these non-native English speaker groups (p < .05).

3.2 Production of English Coda Unreleased Stops

3.2.1 Production of the English coda unreleased stop / t̚/

The results of the pronunciation of English coda unreleased stop /t̚/ by three language groups were calculated and presented in Figure 1.

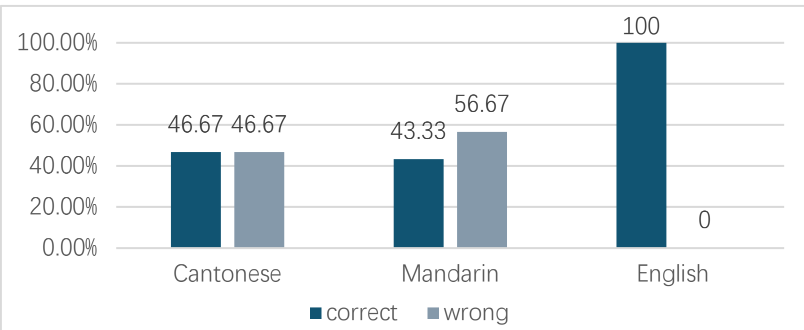

Fig. 1 The percentage of accuracy and errors of /t̚/ among Cantonese, Mandarin, and English speakers.

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From the data of the production of the English coda unreleased stop / t̚/, the English native speaker performed the best with no error, while the accurate rates of Cantonese and Mandarin speakers are lower than 50%. But the Cantonese group performed slightly better than the Mandarin one with a 3% higher accurate rate and a 10% lower error rate.

The material with the highest accuracy in this group is the phrase “sport time”, with the accurate rates of 80% in Cantonese speakers and 60% in Mandarin ones. The accurate samples produced by speaker C2 is as follow (see Fig. 2).

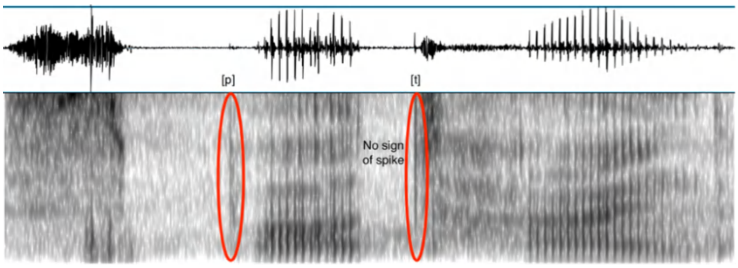

Fig. 2 The phrase “sport time” produced by speaker C2

And the phrase with the lowest accuracy is “spot light”, with only 20% in the Cantonese group and 40% in the Mandarin one. With the unreleased stop / t̚/ at the coda position within the first word /spɒt̚ /, no spikes should be observed in this position. The wrongly articulated sample by speaker C3 is as follow (see Fig. 3).

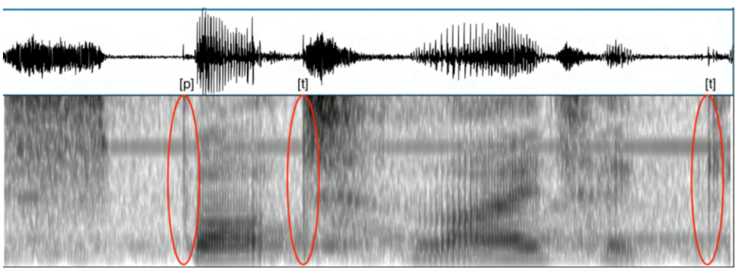

Fig. 3 The phrase “spot light” wrongly produced by speaker C3.

3.2.2 Production of the English coda unreleased stop /p̚/

Among the three language groups, the English group still has the best performance on producing the unreleased stop /p̚/ at the coda position. Cantonese speakers are 20% lower while the Mandarin group is the lowest with an accuracy of 26.67%. And 73.33% of the materials with an unreleased stop coda /p̚/ were mispronounced by the Mandarin speakers, which is much higher than the other two groups.

Among the phrases with /p̚/, "keep promise" has the highest accuracy. All the Cantonese speakers could accurately produce it, while 80% of Mandarin speakers have it right too. Fig. 5 shows the correct sample by speakers E1, in which only the spikes for the two onset stops can be observed.

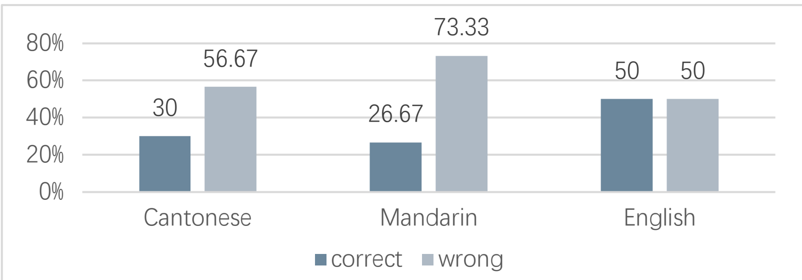

Fig. 4 The percentage of accuracy and errors of /p̚/ among Cantonese, Mandarin, and English speakers.

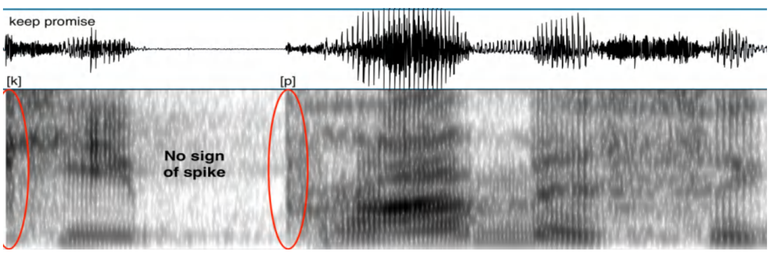

Fig. 5 The phrase "keep promise" produced by speaker E1.

The phrase "lamp light" has the relatively lowest accuracy among the phrases with / p̚/, with 60% accuracy in the Cantonese group and 0% accuracy in the Mandarin one. The spectrogram of the incorrect sample produced by M4 can be seen in Fig. 6.

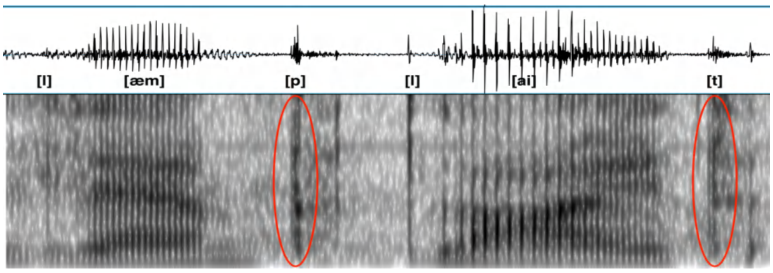

Fig. 6 The phrase "lamp light" was wrongly pronounced by speaker M4.

3.2.3 Production of the English coda unreleased stop /k̚/

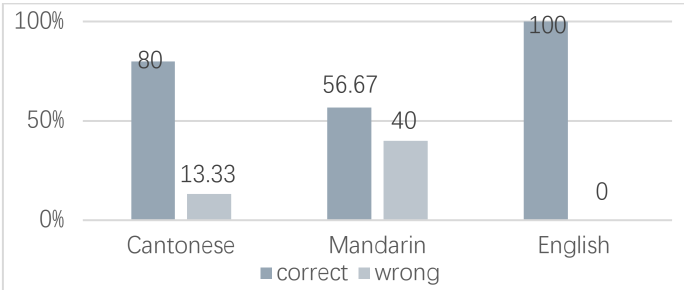

Fig. 7 The percentage of accuracy and errors of /k̚/ among Cantonese, Mandarin, and English speakers.

The English group is seen with the highest accurate rate with no error in this section, followed by the Cantonese group with an accuracy of 80% and an error rate of 13.33%. And the accurate rate of the Mandarin speakers, with only 56.67% is almost half lower than the English group.

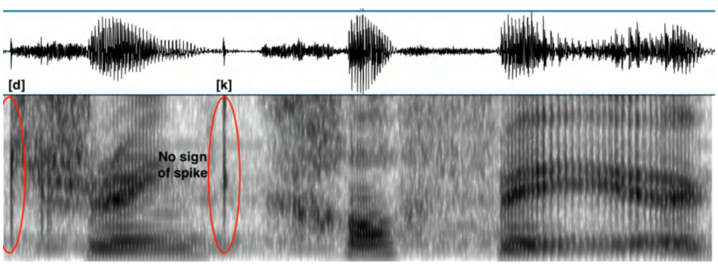

Fig. 8 The correct sample of "drink coffee" produced by C4.

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Among all the materials with /k̚/, 60% of Cantonese speakers and 80% of Mandarin speakers pronounced "drink coffee" correctly, which makes it become the sample with the highest accurate rate (see Fig. 8 for the accurate sample of "drink coffee"); "dark light" is the lowest one, with only one Cantonese speaker articulated it with no mistakes in the two language groups (see Fig. 9 for its incorrect sample).

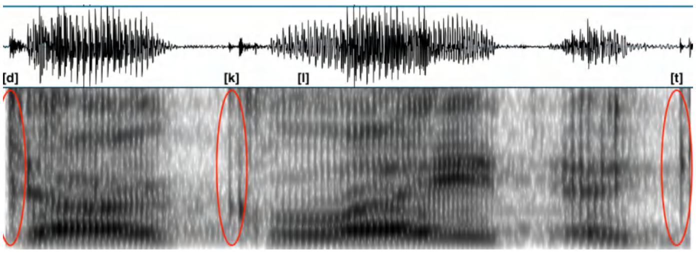

Fig. 9 The incorrect sample of "dark light" produced by E1.

3.3 Summary and Discussion

From the comparison between Tables 7 and 8, the overall accuracy of Consonant-Vowel linking is about 33% higher than the Consonant-Consonant group. Compared with the relatively narrow gaps in their performance among the three language groups in the Consonant-Vowel group, the accuracy gaps are quite large in the Consonant-Consonant group, that is, the Cantonese group is 25.5% lower than the English one, while the Mandarin one is even 40.63% lower. All of these indicate that Chinese EFL learners may have more difficulties in linking coda stops with another onset consonants in phrases in natural speech.

What's more, Table 7 has shown that the accurate frequency gap between Cantonese and Mandarin speakers in pronouncing coda stops followed by a vowel is quite slight, which denotes Cantonese Rusheng's influence on pronouncing coda stops is not prominent.

Plus, according to the collected data, the comparison of three unreleased stops /t̚, p̚, k̚/

is presented in Figure 21. In the production of these three stops, the English native speaker always had the best performance with the highest accurate rate and the lowest error rate. And the Cantonese group takes second place in every type, respectively 3.34%, 3.33%, and 23.33% higher than the Mandarin group.

Speaking of the accurate rate of different stops, the accuracy of /p̚/ is generally the highest among these three types, while the accuracy of /k̚/ is the lowest.

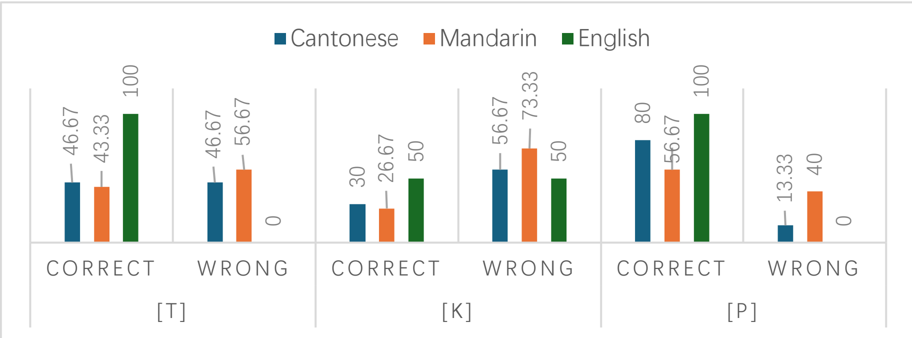

Fig. 10 The percentage of accuracy and errors of three unreleased stops produced by three language groups

Figure 11 presents the comparison of three plosive types, that is incomplete plosions, nasal plosions, and lateral plosions. All the language groups performed best in the unit of incomplete plosions and worst in the unit of lateral plosions. In the production of these three types, the performances of Cantonese speakers are all better than the Mandarin ones, which may result from the positive transfer of Cantonese Rusheng's feature at the coda position.

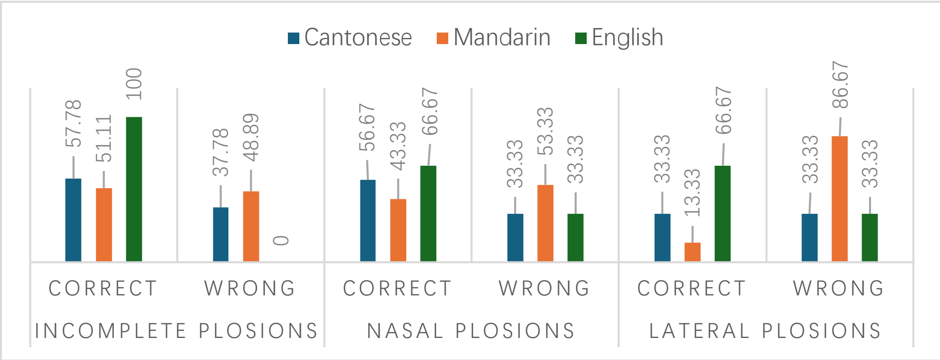

Fig. 11 The percentage of accuracy and errors of three plosive types produced by three language groups

However, from the invalid materials, we could find that both Cantonese and Mandarin speakers tend to add an additional consonant after words ended with consonants, and the Cantonese speakers may mispronounce /l/ as /n/. These are the issues that need to be paid attention in English phonetics teaching activities. Since the issues above are beyond the scope of the current study, the author will not elaborate on them any further.

4. Conclusions and Suggestions

4.1 Major Findings

Spike in the spectrograms is one of the acoustic properties of stops, indicating the release burst of the air. Syllables of Cantonese tones Rusheng are ended by stops /t/, /k/ and /p/ with no audible release, which means no spike could be seen at the coda positions in the spectrograms when pronouncing Cantonese Rusheng syllables. This feature is highly similar to the unreleased stops in English Consonant-Consonant linking in natural speech. In light of this similarity between Cantonese and English, the author designed an experiment and identify that there is a positive transfer of Cantonese Rusheng on English unreleased stops produced by Cantonese speakers.

According to the data collected from analyzing the recordings produced by three language groups, answers to the research questions and major findings of the current study are listed as follows:

1. The gaps in accurate frequency and accurate rate between Cantonese and Mandarin speakers in pronouncing coda stops followed by a vowel in the Consonant-Vowel linking is quite small, which indicates Cantonese Rusheng features are not blindly applied to the English CV contexts, further demonstrating that their production of unreleased coda stops in English is a context-sensitive positive transfer from L1 articulatory habits.

2. As data shown in the last chapter, the Cantonese speakers take up higher accuracy in the production of unreleased stops among all the three types of plosions and three sounds / t̚/, / p̚/, and / k̚/ than the Mandarin ones, but there is still room for Cantonese speakers to improve compared to the English native speaker.

3. All the non-native speakers involved in the current study have previous experience learning English for more than ten years and obtained English proficiency certificates above CET-4, and none of them have received professional pronunciation lessons, had regular contact with English native speakers, or lived in English-speaking countries. Therefore, the higher accuracy of English unreleased stops by Cantonese speakers may not result from school education or an immersive environment of English, but from the equivalence classification and the positive transfer from Cantonese Rusheng syllables ended by stops with no audible release.

4. Broken down by types of plosions, incomplete plosions were the easiest to accurately produce, while lateral plosions were the most difficult among all the language

groups. In terms of the accuracy of different stop sounds, / p̚/ had the highest accuracy rate among the three unreleased stops, while / - k̚/ had the lowest.

5. The accurate rates of three unreleased stops /p̚/, / t̚/ and /k̚/produced by Cantonese speakers are 80%, 46.67%, and 30%, respectively. Speaking of the accuracy sorted by different types of plosions, Cantonese participants had the best performance in incomplete plosions (57.78%) and the worst in lateral plosions (33.33%). The data above indicate that Cantonese EFL learners may have more trouble in linking words ended by /k̚/ with other words beginning with a consonant, especially the lateral /l/.

4.2 Limitations

There are several limitations in the current study that need to be improved in future work.

Firstly, non-native speakers in this experiment are students in Shenzhen University, aged 18-23, so the result may not be universally applicable to people of all ages.

What's more, due to time constraints, the sample size was limited to five participants in non-native English speaker groups respectively and only one native speaker as baseline. And the participants voluntarily signed up for this experiment, who might have more confidence in their English pronunciations. Therefore, the result may not be applied to English learners of all proficiency. And only one English native speaker qualified for the requirements was involved in this experiment. Therefore, the results presented above are part of the research, and the author will recruit more participants and improve the experiment in the future.

Lastly, the materials produced by all the speakers were all transcribed and analyzed solely by the author, a Cantonese student majoring in English, which means the lack of inter-rater reliability checks and acoustic measurements may introduce potential bias. In the future, the perceptional experiment will be designed and more participants from three language backgrounds will be invited to become the perception group, which may contribute to more findings in this field.

4.3 Suggestions

Primarily, although students need to learn English from a young age and English is one of the compulsory disciplines in China's nine-year compulsory education, many districts did not pay much attention to students' English pronunciations back then. Nowadays, with more and more cities and provinces launching English-speaking tests for entrance examinations for both secondary school and college, teachers need to adapt to the new changes and add more phonics courses to their original teaching routines according to the different stages of students' development, so that students would place more weight on learning English phonics from an early age.

Secondly, the teaching activities of second-language phonetics should be integrated with native-language ones. Except for teaching linking, rhythm and stress of English speech, strong forms and weak forms, teachers in the Cantonese-speaking regions should pay more attention to teaching the similarities and differences between the Cantonese Rusheng codas and the voiceless stops in English, especially their articulators, places of articulation and the rules. With the guidance of teachers, Cantonese students might make good use of this strength and overcome the negative transfer of the Cantonese Rusheng.

In addition, a variety of tools can assist offline phonics teaching activities in classrooms. For example, the figure of the human vocal tract can be used to improve students' understanding of the places and organs of articulation, thus increasing the accuracy of their pronunciations. And the software Praat can also be used in high schools or universities to guide students in imitating the pronunciation of English native speakers, and allow them to view the spectrograms and find out the differences in sounds between their native language and English.

Last but not least, EFL learners should also take the initiative to explore more effective methods to learn English. They can try to communicate with native English speakers, create a relatively immersive environment for learning English, acquire and imitate native English speakers' pronunciations by listening to English songs, watching TV series in English, listening to English news or interviews, etc.

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Research on the Discursive Construction and Identity of Homestay Tourism in the Context of Hakka Culture: A Case Study of Heyuan

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Abstract

Against the backdrop of rural revitalization and the integration of culture and tourism, homestay tourism has emerged as a significant pathway for revitalizing local cultural heritage and fostering rural economic development. In Hakka regions, exemplified by Heyuan, Guangdong—the "Hakka Ancient City"—the development of homestays serves as a crucial arena for the inheritance and reconfiguration of Hakka culture within a modern context. This study interrogates the central role of discourse in this process, exploring how multiple discursive agents—including official institutions, operators, and media—collectively construct a distinctive Hakka cultural identity. Furthermore, it examines how this discursively shaped experience influences tourists' place identity and ultimate revisit intentions.To address these questions, the research employs a qualitative case study design grounded in Norman Fairclough's Critical Discourse Analysis (CDA). Taking Heyuan as the primary site, the study systematically analyzes a corpus of official promotional texts, online reviews, and in-depth interviews with 15 operators and 20 tourists. The findings reveal that discourse serves as a core force in constructing cultural identity through narrative strategies centered on "authenticity," "nostalgic memory," and "local differentiation". This discursive construction effectively fosters place identity by shaping cognitive understanding, evoking emotional resonance, and meeting functional expectations. Moreover, place identity acts as a critical mediator; a strong sense of identity significantly predicts revisit and recommendation intentions. By moving beyond macro-spatial analysis, this study unveils the micro-mechanisms of meaning-making that connect culture, place, and individual experience. It offers a novel theoretical perspective on tourism-driven identity formation and provides practical pathways for the sustainable development of ethnic tourism in broader Hakka regions through strategic discourse management.

Keywords: Hakka culture, homestay tourism, discursive construction, place identity, Heyuan

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1. Introduction

The implementation of rural revitalization strategies in contemporary China has necessitated a profound transformation of rural industrial structures, among which homestay tourism has emerged as a quintessential medium for the integration of culture and tourism. In the contemporary era, China has been vigorously promoting the national strategy of rural revitalization, aiming to address the imbalanced development between urban and rural areas and to rejuvenate declining rural communities. This macro-policy environment provides a critical institutional foundation and developmental impetus for rural industries, particularly the cultural tourism sector. Concurrently, the deep integration of culture and tourism (wen lv rong he) has become a significant pathway for regional development, emphasizing the activation and innovative utilization of cultural heritage resources to create unique tourism experiences and drive local economic growth. Within this context, the homestay industry has emerged as a vital component and innovative form of rural tourism, providing not only accommodation but also serving as a critical medium for experiencing local culture and lifestyle. As emphasized by Liang and Xu (2021), the digital marketing of homestays in Heyuan under the new media perspective has redefined how rural spaces are consumed, suggesting that the industry's growth is inherently linked to its ability to tell a compelling cultural story.

In the specific context of Hakka regions, such as Heyuan in Guangdong Province—historically recognized as the "Ancient Hub of the Hakka"—the development of homestays is not only pertinent to industrial upgrading but also serves as a crucial arena for the inheritance and reconfiguration of Hakka culture within a modern context. Heyuan possesses abundant and authentic Hakka cultural resources, including traditional villages, architecture, music, and festivals. These resources are situated within the broader spatial cluster of Hakka traditional villages across Fujian, Guangdong, and Jiangxi, which are characterized by significant historical and cultural value. However, the development of cultural tourism, especially that centered on specific ethnic cultures like the Hakka, faces significant practical challenges. Despite the rich heritage of traditional villages, architecture, and customs, there is a prevalent risk of cultural “symbolization” and “homogenization” in the process of commodification for tourism. This risk is particularly acute in the “Belt and Road” era, where regional culture is increasingly tasked with “going out” to a global audience (Lin & Zhao, 2023). “Symbolization” refers to the reduction of complex, living cultural practices into simplistic, easily marketable icons or stereotypes, while “homogenization” occurs when unique local cultural expressions are diluted or altered to conform to standardized, mass-tourism expectations, losing their distinctiveness. These processes can lead to inauthentic tourist experiences, undermine the cultural integrity of host communities, and ultimately diminish the long-term appeal and sustainability of the tourism destination.

The significance of this study lies in addressing these dual challenges by introducing discourse theory into the study of tourism and identity. The rapid expansion of the homestay industry often leads to a detachment from local cultural roots, making the discursive construction of “authenticity” a critical factor for sustainable growth. Discourse, in this context, refers not just to language but to systems of representation—including images, narratives, practices, and spatial arrangements—that produce meaning, construct identities, and shape social realities. In tourism, various actors such as governments, developers, marketers, local communities, and tourists themselves engage in “discursive practices” that define what a place is, what its culture means, and what a “proper” tourist experience entails. This aligns with recent observations by Wang (2025), who argues that the discursive construction of tourism images often involves narrative contradictions that must be reconciled to create a cohesive brand. In Heyuan, the branding strategy must navigate the tension between preserving ancestral “Hakkaness” and meeting the modern comforts expected by urban travelers (Liang, Liu, & Wang, 2019).

This research focuses on the central role of discourse in this process, aiming to explore how multiple discursive agents (including official institutions, operators, tourists, and media) collectively construct a distinctive Hakka cultural identity through specific narrative strategies and symbolic practices. By moving beyond the macro-spatial analyses prevalent in existing literature, such as mapping spatial patterns or identifying economic determinants, this study interrogates the micro-mechanisms of meaning-making at the heart of cultural tourism. It connects the macro-level dynamics of rural revitalization and industry agglomeration with the micro-level, subjective experiences of individuals, offering a more nuanced understanding of the socio-cultural dimensions of sustainable tourism development. Following the discursive logic outlined by Xu (2024), which emphasizes the power of urban image construction in external communication, this study posits that Heyuan's homestay sector acts as a vital communicative vehicle for Hakka identity.

Specifically, the study seeks to understand how the discursive representation of Hakka identity in Heyuan—ranging from the architectural preservation of "Wei Wu" houses to the staging of traditional tea ceremonies—influences the formation of place identity (difang renting) among visitors. Place identity refers to the meanings and emotional attachments individuals ascribe to a specific location, and the discursively constructed cultural identity becomes a primary resource for tourists to build this personal connection. By applying a critical discourse analysis lens, the research examines the pathway from discourse reception to place identity through cognitive understanding, emotional resonance, and functional expectations. This theoretical inquiry is essential for understanding how regional cultural industries in Heyuan can achieve a sustainable "pathway to go out" while maintaining their unique historical essence (Lin & Luo, 2022).

Ultimately, this discursive construction serves as a core force in shaping tourists'

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behavioral intentions, such as their ultimate revisit intention and recommendation intentions. Place identity plays a key mediating role in this process; a strong sense of identity significantly and positively predicts these behavioral outcomes. By unveiling the constructive power of discourse in connecting culture, place, and individual experience, this study not only provides a novel theoretical perspective for understanding tourism-driven cultural identity formation but also offers practical pathways for achieving in-depth, distinctive, and sustainable development of homestay tourism in Heyuan and broader Hakka regions. The ensuing analysis will demonstrate that the success of Heyuan's tourism rests not merely on the quality of its facilities, but on the resonance of the stories it chooses to tell.

2. Literature Review

The academic inquiry into homestay tourism within ethnic contexts necessitates a multidisciplinary synthesis. This research situates itself at the intellectual intersection of Critical Discourse Studies (CDS), Environmental Psychology, and Tourism Sociology. To provide a comprehensive theoretical foundation, this review systematically categorizes the existing scholarship into three core dimensions: the discursive construction of tourism destinations, the psychological mechanisms of place identity, and the socio-cultural dynamics of Hakka tourism development in the contemporary era.

2.1 The Constructive Power of Discourse in Tourism

Discourse, far beyond its simplistic definition as linguistic communication, is conceptualized in modern tourism studies as a constitutive social practice that actively structures the way a destination is perceived, consumed, and legitimized (Mcluckie & Kuipers, 2024). This perspective aligns with the social constructionist turn in geography, which posits that "landscapes" are not merely physical entities but are "read" as cultural texts. In the context of ethnic tourism, discourse serves as a transformative tool that converts raw cultural heritage into a "commodified experience." As Wang (2025) suggests, the construction of a tourism image is an ideological project rather than a neutral reflection of reality. Through selective narration, certain historical elements are amplified while others are silenced to build a competitive and marketable regional brand.

Recent scholarship has increasingly focused on the role of digital and media discourse in framing these identities. Media platforms do not merely transmit information; they function as discursive agents that employ specific “emotional hooks” to engage potential visitors. Nostalgia, in particular, has emerged as a dominant trope in rural tourism discourse. By framing rural spaces as repositories of tradition and “lost” authenticity, discourse creates a psychological bridge between the urban consumer and the rural destination. In Heyuan, this is manifested through the romanticization of Hakka culture, where themes of “diaspora,” “fortress-like resilience,” and “ancestral belonging” are woven into a cohesive narrative that promises tourists a sense of spiritual homecoming. However, as Fairclough’s framework suggests, this discursive production is inextricably linked to power dynamics, where official narratives often prioritize economic growth over the heterogeneous lived realities of local residents.

2.2 Place Identity and the Psychological Experience of Space

While discourse provides the external narrative framework, the internal reception of these narratives falls within the domain of Environmental Psychology, specifically the concept of place identity. Place identity is defined as a substructure of an individual’s self-identity, consisting of cognitions about the physical environment in which the individual lives or visits. In tourism, this identity is a multi-dimensional construct involving cognitive, emotional, and functional evaluations.

Cognitive identity involves the recognition of a place’s unique attributes and its cultural distinctiveness. In Heyuan’s homestays, this is achieved through the architectural discourse of “Wei Wu” houses and traditional motifs that signal “Hakkaness” to the observer.

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Emotional identity, on the other hand, refers to the symbolic meanings and affective bonds formed between the visitor and the site. As Liang and Xu (2021) observed in their study of new media marketing, digital storytelling—particularly the “micro-narratives” shared by homestay hosts—can effectively bridge the gap between abstract cultural symbols and the lived, visceral experience of the tourist. Functional identity (or place dependence) relates to how well a destination satisfies the specific needs of the traveler, such as the desire for tranquility or authentic cultural immersion.

The formation of place identity is not a passive process; it is an active “meaning-making” endeavor. Tourists do not simply “receive” a brand identity; they negotiate it. The interaction between the “top-down” discursive construction by authorities and the “bottom-up” subjective experience of the tourist determines the strength of the place identity. When there is high semiotic congruence—meaning the discourse matches the physical and social reality—the identity is reinforced, leading to higher levels of satisfaction and revisit intention.

2.3 Hakka Cultural Tourism: Authenticity and “Staged” Narratives

The specific context of Hakka culture presents a unique discursive challenge. Historically known as the “Guest People,” the Hakka identity is built upon a history of migration and adaptation. In the contemporary tourism market of Heyuan, this heritage is frequently utilized to create a sense of “staged authenticity.” Dean MacCannell’s seminal theory of staged authenticity remains highly relevant: in the pursuit of the “real” Hakka experience, tourists are often presented with a curated version of culture that is designed to meet their expectations of “primitiveness” or “tradition.”

Recent research in the Heyuan region has highlighted the strategic importance of the Hakka cultural industry. While some scholars have systematically mapped the spatial distribution and influencing factors of Hakka traditional villages across the tri-province border area to understand their physical preservation. Lin and Zhao (2023) and Lin and Luo (2022) have extensively discussed the “going out” (zou chu qu) strategy for Heyuan’s cultural products under the Belt and Road Initiative. These studies emphasize the role of cultural policy and industry agglomeration in enhancing regional soft power. However, much of this literature remains at the macro-level of policy analysis. There is a notable lack of micro-level qualitative research into how these broad cultural strategies are enacted within the confined, intimate space of a homestay.

Furthermore, the “negotiated” nature of Hakka identity remains under-explored. As tourism becomes more commercialized, the tension between “heritage preservation” and “market demand” intensifies. Liang, Liu, and Wang (2019) pointed out that while branding is essential for economic viability, over-commercialization can lead to “symbolic fatigue,” where the discourse becomes so detached from the actual Hakka lifestyle that it loses its resonance with the visitor.

2.4 Research Gap: The Convergence of Discourse and Identity

Despite the wealth of literature on tourism branding and place attachment, a significant research gap persists in the integration of these two fields within the context of rural Hakka homestays. Most existing studies on Heyuan have either focused on the economic characteristics of industry clusters (Long et al., 2018) or the general marketing strategies of the region (Liang & Xu, 2021). Few have critically examined the “discursive mechanism”—the specific process by which language, symbols, and spatial practices in homestays are internalized by tourists to form a lasting place identity.

There is also a deficiency in qualitative approaches that account for the tourist’s voice. While top-down strategies for cultural “output” are well-documented (Lin & Zhao, 2023), the way tourists interpret, negotiate, or potentially resist these constructions remains largely invisible in the current scholarship. In an era where “authenticity” is increasingly contested,

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understanding the discursive construction of identity is not merely an academic exercise but a practical necessity for the sustainable development of ethnic tourism. This study aims to fill this gap by employing Critical Discourse Analysis to unveil the power structures and psychological pathways that define the modern Hakka tourism experience in Heyuan.

3. Methodology

3.1 Research Philosophy and Qualitative Design

The epistemological foundation of this study is rooted in social constructivism, which posits that social reality and cultural identities are not objective entities but are constructed through social interactions and discursive practices. To capture the fluidity of "Hakkaness" in Heyuan's tourism sector, a qualitative case study design is employed. This approach is particularly advantageous when the research boundary between the phenomenon (discursive construction) and the context (Hakka culture in Heyuan) is not clearly evident. By focusing on Heyuan, a city recognized as the "Ancient Hub of the Hakka," the study provides a "thick description" of how regional heritage is revitalized through modern homestay narratives. As emphasized by Fairclough (2013), qualitative inquiry allows researchers to delve into the "how" of social change — in this case, how traditional rural spaces are discursively transformed into modern consumption sites.

3.2 Analytical Framework: Fairclough's Three-Dimensional Model

The analytical backbone of this research is Norman Fairclough's Critical Discourse Analysis (CDA), which provides a robust tripartite model for linking linguistic micro-details with social macro-structures.

Textual Analysis (Description): This dimension focuses on the formal properties of the texts. In this study, it involves the scrutiny of vocabulary, metaphors, and visual semiotics in Heyuan's homestay marketing. For instance, the recurring use of terms like "ancestral home" and "ecological sanctuary" is analyzed to understand how they construct a specific version of

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Hakka identity.

Discursive Practice (Interpretation): This level examines the “mediation” between text and society—how texts are produced by operators and how they are interpreted by tourists. Following the perspective of Liang and Xu (2021), this study explores how digital storytelling on social media platforms acts as a discursive bridge, translating abstract cultural symbols into relatable tourist experiences.

Social Practice (Explanation): The final dimension situates the discourse within the broader institutional and ideological context of China. This involves analyzing how homestay narratives in Heyuan align with or negotiate the national “Rural Revitalization” strategy and the “Belt and Road” cultural output imperatives (Lin & Zhao, 2023).

3.3 Data Collection and Sampling Strategy

To ensure the “trustworthiness” and “triangulation” of the qualitative data, the study utilized a purposive and theoretical sampling strategy, collecting data from three distinct sources between June 2023 and December 2024.

3.3.1 Case Site Selection

Three representative clusters within Heyuan were selected:

(1) The Wanlv Lake Area: Known for its ecological integration where the discourse focuses on the “Hakka Water Culture.”

(2) Xiatun Village in Dongyuan County: A site where the discourse blends “Red Tourism” (revolutionary history) with traditional Hakka ancestral narratives.

(3) Kanghe Town: Famous for its “Wei Wu” architectural preservation, where the discourse centers on “Living Heritage.”

3.3.2 Textual Corpus

The researcher compiled a comprehensive textual database consisting of 12 official tourism development plans issued by the Heyuan Bureau of Culture, Radio, Television, Tourism, and Sports, and over 50 promotional brochures from top-rated homestays. Additionally, to capture the "mediated" discourse, over 300 user-generated content (UGC) posts from platforms like Little Red Book and Ctrip were scraped, focusing on reviews that specifically mentioned "Hakka culture" or "identity."

3.3.3 Semi-structured Interviews

Primary data was gathered through in-depth, semi-structured interviews. A total of 15 homestay operators were interviewed to understand the "encoding" process—their strategic intentions in portraying Hakka culture. Simultaneously, 20 tourists were selected through "convenience sampling" at the case sites for interviews regarding their "decoding" process. These interviews, lasting 45 to 90 minutes each, explored how tourists internalized the homestay's narrative and whether it fostered a sense of place identity. This dual-perspective approach addresses the gap identified by Zheng and Huang (2022) regarding the lack of tourist-centric discourse analysis in rural tourism.

3.4 Data Analysis and Coding Procedures

The data analysis followed a rigorous thematic coding process facilitated by NVivo 12. The analysis was conducted in three recursive stages:

(1) Open Coding: Initial segments of interview transcripts and marketing texts were labeled with descriptive codes (e.g., "traditional architecture," "host hospitality," "authentic food").

(2) Axial Coding: These codes were grouped into higher-order categories such as "Nostalgic Tropes" and "Modernized Tradition," reflecting the discursive strategies identified in recent literature (Wang, 2025).

(3) Selective Coding: The final stage involved integrating these categories into the CDA framework to explain the mechanism of identity formation.

To ensure qualitative rigor, the study employed "member checking," where preliminary findings were shared with several interviewed operators to verify the accuracy of the interpretations. Ethical approval was obtained, and all participants were anonymized using codes (e.g., Operator-01, Tourist-05) to ensure confidentiality.

4. Findings and Discussion

The discursive construction of Hakka homestay tourism in Heyuan is a multi-vocal and contested process where traditional symbols are reinterpreted through modern narrative strategies. Following Fairclough's three-dimensional model, this section analyzes how the textual choices in Heyuan's homestays translate into discursive practices and ultimately shape the social reality of place identity.

4.1 Textual Dimension: The Rhetoric of Authenticity and Nostalgia

At the textual level, the discourse is characterized by a high frequency of "cultural keywords" and "visual metaphors" that aim to establish an aura of authenticity. Based on the analysis of marketing texts and participant observation in areas such as Xiatun Village and the Wanlv Lake basin, this study identifies three primary discursive strategies: "The Discourse of Authenticity," "The Narrative of Nostalgia," and "The Hyper-Local Differentiation."

The "Discourse of Authenticity" is prominently featured in the spatial arrangement and linguistic framing of homestays. Operators in Heyuan frequently employ architectural metaphors to claim cultural legitimacy. For instance, many homestays located in traditional "Ganlan" or "Weilong" houses utilize phrases such as "living in history" or "breathing with the centennial walls" in their social media marketing. This discursive reliance on physical heritage aligns with the fact that these traditional dwellings are key components of the Hakka village system, whose spatial integrity is influenced by both natural environment and social lineage (Xie, Zhou, & Liu, 2022).

During our field research in Dongyuan County, participant observation revealed that

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this "textual authenticity" is often supported by a meticulous curation of the physical environment. In homestays like those in Kanghe Town, the use of traditional materials—grey bricks, wood carvings, and rammed earth—serves as a non-linguistic text that reinforces the written narrative of "ancient heritage". One operator (Operator-04) remarked during an interview:

> We didn't just renovate a house; we "translated" a lifestyle. When guests see the original wooden beams and the mottled grey bricks, they aren't just looking at materials—they are engaging with a discourse of Hakka resilience and craftsmanship that has lasted for generations. If the text says 'ancient,' the touch must feel "ancient".

This textual strategy is further augmented by the "Narrative of Nostalgia," which taps into the urban dweller's longing for "Xiangchou" (rural nostalgia). In Heyuan's homestay clusters, Hakka culture is often presented as a "spiritual sanctuary". Marketing materials on platforms like Little Red Book often frame the homestay experience as a "return to the ancestral home," regardless of the guest's actual lineage. This is achieved through the curated performance of daily life, such as the communal preparation of Hakka ground tea (Lei Cha). As Wang (2025) notes, this type of discourse constructs a romanticized past that functions as a consumable experience, allowing tourists to temporarily adopt a "Hakka identity" through participation in these staged authenticities.

4.2 Discursive Practice: Encoding by Hosts and Decoding by Tourists

The second dimension of Fairclough's framework—discursive practice—focuses on how these texts are produced and consumed. In Heyuan, the "encoding" process by hosts is often a strategic negotiation between cultural preservation and commercial viability. Hosts act as "cultural brokers," translating complex Hakka customs into digestible narratives for outsiders.

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Our analysis of over 300 user-generated content (UGC) posts indicates that the "production" of homestay discourse is no longer a top-down process. Instead, it is a co-construction where operators provide the "cultural hooks" (e.g., specific architectural details or ritualized tea services), and tourists amplify these narratives through their own social media sharing. This aligns with Liang and Xu's (2021) observation that new media marketing has redefined rural space consumption through digital storytelling.

The transition from consuming a discourse to forming a robust place identity is mediated by the tourist's "decoding" process—their cognitive and emotional engagement with the narrative. In the context of Heyuan, place identity is not an immediate outcome of visitation but a gradual accumulation of "meaning-making" moments. Our qualitative data from semi-structured interviews suggests that when the discursive construction of a homestay aligns with the tourist's functional expectations and emotional needs, it fosters a strong sense of "belonging to the place" (place identity).

A tourist interviewed at a homestay near Wanlv Lake (Tourist-07) shared her experience:

> Before coming, I read about the "Ecological Hakka"identity of Heyuan. But it was only after staying here, hearing the host explain how the local architecture protects against the humid river air, and eating food grown in the backyard, that I felt a real connection. The discourse in the brochure was just a hook, but the host's stories provided the substance. I don't just like this room; I feel I understand the logic of this land.

This highlights a crucial finding: cognitive identity—the intellectual understanding of a culture's logic—serves as the foundation for emotional identity. When the discourse moves beyond "showing" (text) to "explaining and involving" (practice), the bond with Heyuan is

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solidified. Participant observation confirmed that guests who engaged in “host-led storytelling” reported a deeper connection to the local heritage than those who only consumed the visual aesthetics of the property.

4.3 Social Practice: Ideological Tensions and “Symbolic Fatigue”

At the macro-level of social practice, the discourse of Heyuan’s homestays is situated within the ideological framework of “Rural Revitalization” and the “Belt and Road” initiative’s cultural output goals. As discussed by Lin and Zhao (2023) and Lin and Luo (2022), Heyuan’s cultural industry is increasingly tasked with “going out” (zou chu qu), requiring a discourse that is both globally appealing and locally authentic.

However, tensions arise when there is a “discursive gap” between the high-level policy narratives and the actual tourist experience. In some highly commercialized areas of Heyuan, we observed a phenomenon of “over-curation,” where the pursuit of a standardized “luxury” experience contradicts the discourse of “authentic rural Hakka life.” Some homestays emphasize “traditional Hakka values” in their brochures but provide services that are indistinguishable from urban luxury hotels, lacking what locals call the “soil smell” (tu qi) or local soul.

This leads to what Lin and Zhao (2023) describe as “symbolic fatigue” or “discursive alienation”. When tourists perceive the culture as a mere “staged performance” devoid of genuine social practice, it results in a superficial “tokenistic identity”. One tourist (Tourist-12) noted during an interview:

> The website said this was a”Hakka immersion,” but it felt like a theme park. The staff didn’t speak the dialect, and the “traditional dinner” was a generic buffet. The discourse promised roots, but the reality was rootless.

In such cases, the intention to revisit is significantly lower because the discursive experience lacks the “uniqueness” and “depth” required to sustain a long-term emotional

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bond. This illustrates the power dynamics at play in Fairclough's social practice dimension: the dominance of commercial/industrial discourse can sometimes overwrite the "lived discourse" of the local community, leading to a loss of cultural integrity.

Our participant observation in Xiatun Village provided a counter-example where "Red Tourism" and "Hakka Ancestral narratives" were successfully integrated. By involving local villagers in the storytelling process, these homestays maintained a "semiotic congruence" between the text and the lived reality. This alignment between the textual, discursive, and social dimensions of CDA is therefore the prerequisite for successful and sustainable cultural identity construction in Heyuan (Zheng & Huang, 2022).

In conclusion, the discourse of Heyuan's homestays functions as a bridge between macro-level revitalization policies and micro-level individual experiences. The most successful homestays are those that curate a "layered discursive system"—combining visual authenticity with intellectual engagement and social integrity—to foster a profound and lasting place identity.

5. Conclusion

5.1 Research Summary

This study concludes that discourse is far more than a mere marketing instrument; it serves as the fundamental mechanism through which Hakka cultural identity is constructed, negotiated, and commodified within the homestay tourism sector of Heyuan. By applying Critical Discourse Analysis (CDA) framework, this research has systematically demonstrated that effective identity-building is a multi-dimensional process. It requires a harmonious alignment between the Textual dimension (the symbolic use of architecture and language), the Discursive dimension (the dynamic host-guest interactions and digital storytelling), and the Social dimension (the macro-frameworks of national policy and ancestral tradition).

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The research reveals that a "layered discursive system" is essential for successful cultural transmission. This system effectively integrates macro-narratives, such as "Rural Revitalization" and the "Ecological Heyuan" initiative, with the intimate micro-narratives of individual host stories and lived experiences. This intersection of top-down policy discourse and bottom-up personal storytelling creates a robust cultural landscape that fosters a profound sense of place identity among tourists.

5.2 Key Findings

A central finding of this study is that place identity acts as a critical mediator in the Heyuan tourism experience, bridging the gap between discursive consumption and behavioral loyalty. The empirical data suggests that the more a tourist internalizes the discursively constructed "Hakkaness" — moving from mere visual observation to an intellectual understanding of Hakka resilience and ecological wisdom—the higher their likelihood of becoming a loyal advocate for the destination. This process is particularly evident in clusters like Xiatun Village and Wanlv Lake, where the discourse of "homecoming" and "ecological harmony" resonates deeply with urban travelers.

However, the study also identifies a significant "discursive gap" in over-commercialized settings, which poses a substantial threat to the sustainability of the Hakka brand. When marketing texts promise "authentic immersion" but provide standardized, soul-less luxury services, it leads to "symbolic fatigue" and discursive alienation. As emphasized by Liang, Liu, and Wang (2019), authentic place identity requires more than the passive consumption of visual symbols; it necessitates a genuine intellectual and emotional "resonance" with the local lifestyle. Furthermore, this study highlights that the construction of identity is increasingly mediated by new media practices, as noted by Liang and Xu (2021), where digital narratives act as a precursor to physical experience.

Ultimately, for Heyuan to maintain its competitive edge as the "Ancient Hub of the Hakka," it must ensure that its tourism discourse remains rooted in the lived reality of the local community. By aligning official "going out" strategies (Lin & Zhao, 2023; Lin & Luo, 2022) with authentic, host-led storytelling, Heyuan can create a sustainable tourism model that balances economic growth with cultural integrity, ensuring that the Hakka identity is not just consumed as a product, but experienced as a living heritage.

6. Implications

The findings of this study offer significant insights into the intersection of discourse, cultural heritage, and tourism psychology. By deconstructing the "discursive construction → place identity → behavioral intention" chain within the specific context of Heyuan, this research provides both academic depth and actionable strategies for the sustainable development of ethnic tourism.

6.1 Theoretical Contributions

Theoretically, this research advances the application of Critical Discourse Analysis (CDA) within the field of tourism geography and heritage studies by shifting the focus from macro-level destination branding to the micro-level of homestay interactions. This shift is critical as it challenges the traditional, essentialist view of cultural identity as a static, inherited "resource." Instead, this study conceptualizes Hakka identity as a dynamic "discursive product" that is continuously negotiated, performed, and reconstructed between multiple agents—hosts, guests, and state institutions. By integrating Fairclough's three-dimensional framework, the research reveals the intricate process through which the structural power of national "Rural Revitalization" policies is translated into the individual, localized narratives of homestay hosts. This provides a theoretical bridge between macro-

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level political ideology and the micro-level, subjective “lived experience” of the tourist (Zheng & Huang, 2022).

Furthermore, this study enriches the literature on “Place Identity” by identifying the specific “Cognitive,” “Emotional,” and “Functional” pathways through which discursive reception is internalized as psychological attachment. Unlike previous studies that treat place identity as a monolithic construct, this research argues that in the context of Heyuan, identity is formed through a “semiotic congruence” between the text (marketing), the practice (host-guest interaction), and the social context (Hakka tradition). This adds a more nuanced layer to Dean MacCannell’s theory of “staged authenticity.” The findings suggest that for the modern “post-tourist,” the perceived authenticity of a culture depends less on historical “facticity” and more on the internal coherence and resonance of the discursive framework presented during the stay (Wang, 2025). This move toward “discursive authenticity” represents a significant theoretical evolution in how we understand the consumption of ethnic heritage in the digital age.

6.2 Practical Implications

From a practical perspective, the study provides a strategic and evidence-based roadmap for homestay operators and tourism policymakers in Heyuan to transcend the superficial “symbolization” and “commodification” of Hakka culture.

First, for Managers and Operators, the research highlights the necessity of building a “layered discursive system” (Liang, Liu, & Wang, 2019). The study demonstrates that visual motifs alone—such as displaying Hakka “Wei Wu” architectural elements—are insufficient to foster long-term loyalty. Operators must transition from being “facility providers” to “cultural

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curators.” This involves the curation of “small stories” and “micro-narratives” (e.g., the specific lineage history of a village or the botanical lore behind Hakka Lei Cha) that allow tourists to engage in active “meaning-making.” By providing these discursive entry points, operators can help tourists move from being passive observers to active participants in the Hakka story.

Second, regarding Marketing and Communication, the findings suggest a radical shift in digital storytelling strategies. In an era dominated by platforms like Little Red Book and Douyin, marketing should prioritize “living culture” over over-idealized, static imagery (Liang & Xu, 2021). The discourse that resonates most with contemporary travelers is that of the “unscripted rural life”—the daily rhythms, dialects, and social interactions of Hakka residents. This approach not only enhances perceived authenticity but also builds a “digital place identity” before the tourist even arrives in Heyuan.

Third, for Public Policy and Community Development, the study emphasizes the importance of empowering local residents as “discursive co-producers” rather than mere “background characters” in the tourism narrative (Lin & Zhao, 2023). When the narratives shared with tourists are rooted in the genuine lived reality and pride of the local community, Heyuan can avoid the “reality gap” and “symbolic fatigue” that often lead to “tokenistic identity.” Policymakers should support training programs that help local villagers articulate their own heritage narratives, ensuring that the “output” of Hakka culture under the Belt and Road Initiative remains both competitive and culturally integral (Lin & Luo, 2022). Ultimately, these discursive strategies facilitate a more resilient and sustainable form of tourism that balances economic imperatives with the authentic preservation and innovative activation of Heyuan's unique Hakka soul.

7. Limitations and Future Prospects

Despite its contributions, this study has limitations. First, the single-case focus on Heyuan may limit generalizability to other Hakka regions like Meizhou (Lin & Luo, 2022). Second, the cross-sectional design captures only a "snapshot" of identity, overlooking its long-term evolution (Fairclough, 2013).

Future research should conduct cross-regional comparisons to identify diverse "discursive markers." Additionally, investigating the impact of AI and the Metaverse on "virtual" Hakka heritage presents a new frontier (Wang, 2025). Longitudinal studies are also recommended to track the tourist "identity lifecycle" and its effect on sustained revisit intentions.

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Lament for the Marginalized: The "Other" Behind Animal Imagery in *A Bird in the House*

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Abstract

Canadian writer Margaret Laurence's short story collection *A Bird in the House* is rich in animal imagery. These images carry profound cultural connotations and are highly intertextualized with various marginalized individuals—or the "Other" in different social contexts within the fictional prairie town of Manawaka: the endangered loons symbolize Piquette, who is marginalized in terms of both ethnicity and gender; the horses of the night represent the economically marginalized Chris; and the half-husky stands for Harvey, who is marginalized in both economic status and family environment. The tragic fates of the animals and the marginalized characters are closely intertwined and reflect each other, refracting the writer's sympathy for the vulnerable and her deep humanistic concern.
Keywords: A Bird in the House, animal imagery, the marginalized, the "other"

Margaret Laurence (1926-1987) was a literary giant of Canada's "Renaissance" period in the 1960s, ranked alongside Margaret Atwood and Alice Munro as one of the "Three Major Figures of Canadian Literature." With a prolific literary career, she gained national and international acclaim primarily through her distinctively Canadian prairie-themed "Manawaka Series" of five novels. These five works are interconnected, exhibiting strong intertextuality, and meticulously depict the broad social landscape of Canada during the 1950s and 1960s alongside the destinies of diverse individual characters. Generally speaking, Laurence's works not only focus on Canadian women's position and circumstances in society (Wen, 2012) and their search for individual identity (Guan, 2016) but also pay special

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attention to other themes such as national identity (Guan, 2017) and the marginalized figures. Published in 1970, A Bird in the House is the only short story collection in this series, comprising eight stories. With elegant language and poignant plots, it portrays the social fabric and individual fates of the fictional town of Manawaka through the growing-up experiences of a white upper-class girl, Vanessa.

While carrying forward her familiar themes, A Bird in the House places greater emphasis on the fate and living conditions of disadvantaged groups. The most famous story among this collection is The Loons, and existing research has mainly focused on the female protagonist Piquette's construction of female identity (Wang, 2019), spatial politics (Liu, 2011), symbolic imagery (Sheng, 2010), etc. These studies recognize the tragic fate of Piquette as a marginalized outsider as well as the "Other" ostracized by mainstream society. However, most of them fail to notice the inter-relationship between Piquette and the loons, both nearly extinct for being unneeded by society. Therefore, it could be argued that the loons are metaphorical for Piquette. In addition to The Loons, similar metaphors abound throughout the collection. Piquette represents only ethnic minorities and women; other marginalized individuals in society, such as impoverished men or abandoned children, remain under-researched. Therefore, exploring the other stories in this collection can lead to a broader and deeper understanding of a vast social landscape in this fictional cosmos.

Besides, animal writing in Canadian English literature has a long history, numerous authors, renowned works, and distinctive characteristics combined to form an essential and captivating literary genre (Tu, 2023). Although Laurence does not feature animals as primary subjects in her works, their presence consistently holds a significant place. Laurence was good at employing animal imagery to create dual narrative threads. The stories, featuring many parallel images, reflect Laurence's sympathy for Manawaka's marginalized individuals and her profound humanistic concern. This paper intends to explore, from the perspective of

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the “Other”, the parallelism between human characters as well as their destinies and three corresponding animal images in the stories, revealing the cultural connotations and the author’s deep concern for the marginalized.

1. The Concept of the “Other” and Its Application in Literary Studies

The intellectual lineage of the “Other” could trace back to G.W.F. Hegel’s Master-Slave Dialectic, where the “Other” is posited as a necessary condition for the formation of self-consciousness — selfhood is defined only through the recognition (or denial) of an opposing, unequal other. Jean-Paul Sartre framed the Other as a threat to subjective freedom: the “gaze” of the Other reduces the self to a fixed object, initiating an unresolvable struggle for dominance in interpersonal relations.

Poststructuralism deepened the concept by shifting focus from individual consciousness to systemic power and discourse. Jacques Derrida demonstrated how Western metaphysics relies on hierarchical binary oppositions (e.g., West/East, male/female), where the latter is marginalized as a subordinate Other to legitimate the former’s authority. Michel Foucault extended this to institutional contexts, arguing that modern disciplines (prisons, schools, clinics) construct “abnormal” Others (criminals, madmen) through knowledge-production, enforcing social control via categorization. The concept’s most transformative application emerged in postcolonial and feminist theory. Edward W. Said’s *Orientalism* (1979) exposed how Western scholarship and literature constructed the “Orient” as a primitive, irrational Other to justify colonial domination—a process of “othering” that erased the agency of non-Western peoples. Gayatri Spivak’s essay “*Can the Subaltern Speak?”* (1988) further interrogated the silencing of marginalized Others, arguing that even well-meaning

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attempts to "give voice" to the oppressed risk replicating colonial power dynamics. Homi Bhabha expanded this by emphasizing hybridity: in postcolonial literature, the "Other" is not a passive victim but a site of resistance, where cultural mixing disrupts colonial binaries. For feminism, Simone de Beauvoir's *The Second Sex* (1949) established women as the quintessential Other, defined by their opposition to men rather than their own subjectivity.

In literary studies, "the Other" serves as a powerful lens to unpack power, identity, and marginalization. For example, postcolonial critics use Said's framework to analyze how texts like Joseph Conrad's *Heart of Darkness* replicate Orientalist tropes; feminist scholars deploy Beauvoir's theories to examine gendered othering in texts ranging from *Jane Eyre* to contemporary women's writing, revealing how female characters negotiate their positioning as the "Other" of patriarchal discourse.

In recent years, a growing number of studies use this lens to focus on a variety of marginalized groups (e.g., indigenous peoples, ethnic minorities, the elderly), and the connotation of "the Other" proves equally applicable to unpacking the thematic depth of three pivotal stories in *A Bird in the House*: it illuminates the ethnic and gendered othering experienced by Piquette, whose tragic fate is mirrored by the endangered loons; it exposes the economic disenfranchisement that renders Chris an invisible social outcast, paralleled by the symbolic horses of the night; and it reveals how the dual burdens of economic marginalization and familial abandonment cast Harvey as a displaced "Other", whose plight resonates with the abused half-husky. Therefore, this perspective provides a deeper and broader insight to *A Bird in the House* as well as Margaret Laurence's creative purpose.

2. The Interplay of the "Other" and Animal Imagery in *A Bird in the House*

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2.1 Piquette—The Loons

The Loons is known for its beautiful language and rich symbolic imagery, recounting the tragic and short life of a Métis girl, Piquette Tonnerre. The town of Manawaka at that time was multi-ethnic, comprising not only the dominant white immigrants from different European countries but also Asians and local Indigenous Indians, serving as a microcosm of Canada's multicultural society. In the mid-to-late 19th century, with the development of Western Canada, intermarriage between white settlers and Indigenous people increased. Due to their darker skin, French-Canadian mixed-blood people derisively called themselves "burnt wood," while whites referred to them as "Métis" or, derogatorily, as "half-breed." They were the poorest, lowest in status, and most discriminated-against group in Manawaka, their ethnic identity relegating them to the margins. The Métis were ridiculed as "neither flesh, fowl, nor good salt herring" (Laurence, 1989, p.108-109) to the whites. Hence, they are undoubtedly the "Other" in this cosmos.

Piquette was the representative of the Métis, whose living conditions were extremely harsh, dwelling in self-built shacks on the town's outskirts, surrounded by scavenged garbage. From the perspective of spacial politics, the marginalization of their living environment aptly symbolizes their marginalized existence (Liu, 2011). Plagued by these abysmal living environment, the twelve- or thirteen-year-old Piquette contracted severe bone tuberculosis—a condition that was rendered all but invisible and dismissed as unsightly: "she existed for me only as a vaguely embarrassing presence, with her hoarse voice and her clumsy limping walk and her grimy cotton dresses that were always miles too long" (Laurence, 1989, p.109). As a female, with her mother having left, she had to manage all household chores and care for her younger siblings despite her illness, so gender is the shackle her family imposed on her. One incident clearly shows what a Métis is like in the white people’s eyes.The kind Dr. MacLeod, suggesting she accompanies them to Diamond Lake for a rest from heavy housework, faced immediate opposition from his wife and mother, the latter declaring, “if that half-breed youngster comes along to Diamond Lake, I’m not going” (Laurence, 1989, p.110). It is obvious that the white deems being with the Métis is a disgrace.

At Diamond Lake, they encounter the near-extinct loons. The birds’ nests are on the opposite shore from the cottages, and their calls could be heard at night. The birds’ distance from human habitation parallels the Métis’s isolated shacks, metaphors for their marginalized existence. Before humans arrive, the loons are masters of Diamond Lake, but as cottages are built, their living space shrinks. “My father says we should listen and try to remember how they sound, because in a few years when more cottages are built at Diamond Lake and more people come in, the loons will go away” (Laurence, 1989, p.114). The fate of the Métis mirrors that of the loons. As descendants of the Indigenous people, the Métis were the land’s original owners. With the arrival of colonizers, indigenous lands were seized, their living space compressed, gradually forcing them to become the “Other” in their own land and sink into the bottom of society. In the novel *The Diviners*, Laurence, through the protagonist Morag, voices injustice for the Métis uprising leader: “The Métis were losing the land—it was taken from them. All he wanted was for them to have their rights. The government hanged him for that” (Laurence, 1984, p.132). As white colonists encroached on the Métis’ lands and urban development intruded upon the loons’ natural habitat, the fates of the Métis and the loons ran parallel to each other.

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In Vanessa's words, the crying of the loons is "ululating...Plaintive, and yet with a quality of chilling mockery" (Laurence, 1989, p.114), but seldom there are people willing to listen. Similarly, due to limited education, the Métis spoke a language called "patois" among themselves, difficult for mainstream society to understand, placing them in a state of "speechlessness". Speechlessness means being deprived of the right to speak, becoming inaudible in society, just as the loons presented only black silhouettes in the night, their true forms unknown.

Stuart Hall argued in Cultural Identity and Diaspora (1990, p.222), "We should probably not think of identity as a finished fact, but rather as an ongoing production—one that is forever incomplete, in constant flux, and continuously constructed and represented from within rather than imposed from without." This indicates that identity is characterized by fluidity, existing in a dynamic process of constant shaping and construction. Individuals can transform and seek new identities through their own efforts. Has Piquette strived to change her identity? The answer is yes. When she grows up, Piquette hopes to change her social status and identity by assimilating into mainstream society through marriage to a white man, but a marriage based on inequality is doomed. Years later, she returns to Manawaka with two children, eventually dying in a fire in her shack due to alcoholism. Coincidentally, the adult Vanessa, revisiting the "prosperous tourist resort" Diamond Lake, finds the loons extinct, their habitat encroached upon, vanishing without a trace just like Piquette.

2.2 Chris— Horses of the Night

Chris, the protagonist of Horses of the Night, is Vanessa's distant cousin from a remote farm at Shallow Creek, a margin far from Manawaka. With his father deceased and

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the family impoverished, he relies on Vanessa's grandfather's support to continue high school, a veritable poor relation "living off" the family. As a young man aspiring to be a civil engineer, his abject poverty is an inescapable mire. The lack of economic resources, coupled with the economic recession in Canada, condemns him to a permanent state of economic marginalization.

In sociological research, the concept of role is typically broken down into three distinct dimensions, namely ideal role, perceived role and performed role respectively. Ideal role refers to a complete behavioral model prescribed by law or society, which is often idealized in nature. Perceived role is what an individual subjectively believes they ought to play, which may be shaped by personal values. While the performed role refers to what an individual actually enacts in specific situations based on their capabilities and available opportunities. If there is a discrepancy between social expectations (i.e., the ideal role) and an individual's actual conduct (i.e., the performed role), role distance comes into existence (Merton, 1968). In Horses of the Night, there is obvious role distance between Chris' ideal role, perceived role and performed role, which is mainly rooted in the economic reason and reflected in the different images of horses.

At the beginning of the story, Chris's attire upon arrival hints at his economically "Other" status. Though his clothes appear somewhat formal, Vanessa's mother's whisper to her grandmother reveals the truth: "Heavens, look at the shirt and trousers—must've been his father's, the poor kid" (Laurence, 1989, p.123). Chris is good at craftsmanship and full of ambitions. In his descriptions of home, "horses" are the core images. Upon first meeting, Chris tells Vanessa about two fine riding horses on the farm: Duchess and Firefly, sleek potential racehorses. At this point, Chris dreams of university and becoming a civil engineer, building real bridges, which is his ideal role. But the economic situation extinguishes his university dream. After high school, unable to afford university and unwilling to compromise by returning to farm labor, he becomes a traveling salesman, dreaming of making a fortune (perceived role). As a nation bordering the emerging United States, Canadians were somewhat influenced by the "American Dream," believing hard work could lead anyone to success. But during the economic recession in the 1950s-1960s, even middle-class families like the doctor's can not afford his wares, which dooms Chris's dream. In the end, Chris has to return home to make a living (the performed role).

After her father's death, Vanessa visits Shallow Creek for relaxation to relieve her sadness and sees the real horses. "The horses were both plough horses, thick in the legs, and badly matched a team" (Laurence, 1989, p.136). The shabby horses hint at the harsh reality: a farm struggling to sustain itself can only produce scrawny horses, just as the impoverished farm cannot support Chris's dreams. One night on the farm, Chris talks about horses in the war, "...horses in the mud, actually going under, you know? And the way their eyes looked when they realized they weren't going to get out. Ever seen horses' eyes when they're afraid, I mean really berserk with fear, like in a bush-fire?" (Laurence, 1989, p.141) At this point, Chris is like those horses stuck in the mire: former hope turned to despair, sinking in life helplessly, leaving only endless disappointment and fear. When the war began, he joins the army and six months later, he suffers a mental breakdown and is sent to a psychiatric hospital, his despairing soul finally finding a place to rest. At the end of the story, Laurence pours her sympathy for the economically marginalized Chris into the lines of verse: "Slowly, slowly, horses of the night” (Laurence, 1989, p.144).

From the foregoing analysis, economic destitution and the distance between ideal role and the performed role stand as the root causes of Chris’s tragedy. Had his family been able to support his education, and had he truly fulfilled his idealized role as a civil engineer, his life might have taken an entirely different trajectory—rather than ending his days confined to a hospital bed.

Moreover, the metamorphic imagery of horses—evolving from sleek racehorses to humble plough horses and ultimately to horses perishing in the war—mirrors the gradual decline of Chris’s fate as an economically marginalized young man. By drawing a parallel between Chris and these equine symbols, Margaret Laurence infuses the tragic narrative with a poignant aesthetic, rendering it far more memorable and resonant.

2.3 Harvey — The Half-Husky

The Half-Husky features a mixed-breed dog named Nanuk, after whose breed the story is titled. The term “half-breed” itself carries derogatory connotations, implying impure blood lineage or, more broadly, societal scorn and disdain. The dog, given to Vanessa because its original owner can not care for it as it has too many siblings, is initially opposed by her grandfather because “They make a mess, they’re destructive” (Laurence, 1989, p.147). It is allowed to stay only after Vanessa’s persistent pleas, but it has to be hidden in the basement and follow carefully scheduled timetable to avoid meeting grandfather, the representative of authority both at home and in Manawaka. Thus, the half-Husky named Nanuk is a marginalized “Other” in the Brick House.

The protagonist of this story, Harvey Shinwell, to some extent, parallels the dog in his life trajectory. In his childhood, his parents die and he is raised by his aunt. No man would

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marry his aunt for this reason and thus he is resented by his aunt. So both Harvey and Nanuk are unwanted beings in their respective family. The author did not tell what happened to Harvey, but from the scene that the only way he tries to escape from interrogation about stolen telescope is naively pretending to sleep, and he offers no resistance after being threatened and beaten by his aunt who is much smaller in frame, readers can speculate violence is normal to him. When the story happens, he is a large-framed newspaper boy about sixteen years old with "colourless eyebrows and a pallid mottled face. He was somebody who had always been around and whom I had never actually seen" (Laurence, 1989, p.149). Therefore, he was invisible to the white in the Brick House, the upper class in Manawaka. Wang Shouren (2002, p.42), when discussing the image of black people in white society, argued: "Owing to the unique structure of their inner vision, people mainly turn a blind eye to the living, distinctive and authentic selves beneath the Black skin." But actually, in the Western main-stream society, not only the black are invisible, the poor white are also unseen. Laurence chose this "invisible" boy as a protagonist to demonstrate the complicated interplay of traumas society imposed on the marginalized as well as animals in an indirect way.

The relationship between humans and animals is a crucial aspect of the human-nature relationship. As friends of humanity, dogs are among the most beloved and petted animals and numerous works described the genuine bond between these two species. However, in *The Half-Husky*, the dog turns out to be a target of abuse and torture. The writer spends considerable detail describing how Harvey torments and bullies Nanuk: poking it with a sharp stick, sprinkling pepper in its eyes, secretly shooting it with a slingshot, and even lighting its hair with a whole handful of lit matches. How could a boy be so cruel to a dog?

"To understand a work of art, an artist, or a group of artists, one must correctly grasp the spirit and ethos of the era to which they belong. This constitutes the ultimate interpretation of the artwork and the fundamental determinant of all its attributes" (Taine, 1998, p.46). Harvey resides in the impoverished "North End of Manawaka, a district rife with shacks and shanties" (Laurence, 1989, p.156)—a neighborhood reminiscent of Piquette's dilapidated home—where every corner exudes a palpable sense of desolation and disarray. This blighted geographical environment is not merely a backdrop; it is a tangible reflection of the residents' marginalized social status and destitute living conditions, rendering it virtually impossible for a boy growing up in such deprivation to access quality education or opportunities for upward mobility. Compounding this adversity is his aunt's perception of him as a burdensome liability, coupled with her propensity for inflicting physical violence upon him.

According to social learning theory, children raised in hostile domestic environments are predisposed to mimic the abusive behaviors of their caregivers. Through the dual processes of observational learning and reinforcement, such children may internalize aggression as a normalized mode of interaction, directing it toward both humans and animals (Hensley et al., 2017). Yet after years of enduring habitual intimidation, Harvey has been thoroughly "tamed," stripped of the courage to resist or retaliate against his oppressor. Deprived of a legitimate channel to vent his pent-up frustration and resentment, he redirects his repressed aggression toward Nanuk—a vulnerable target who "is considered weaker and less likely to retaliate" (Wright & Hensley, 2003). Abusing Nanuk is actually a reflection of Harvey's powerlessness and existential despair: by asserting dominance over a defenseless being, he momentarily compensates for the powerlessness he endures in his daily life. This act of displaced aggression also embodies the cyclical nature of violence perpetuated by systemic deprivation, as individuals trapped in marginalized circumstances often replicate the oppressive behaviors they have endured, perpetuating a vicious cycle of harm.

Although later Harvey's physical abuse of Nanuk stops after grandfather's intervention, its psychological trauma is permanent. Nanuk remains hostile to anyone outside the family, is eventually chloroformed. In parallel, Harvey soon drops out of school, works in a café, and is arrested a year later for robbery and sentenced to six years, and later disappears without a trace. Maybe go back to prison again.

In this story, Laurence first sketches the repellent image of Nanuk as an abuser, only to unveil his identity as a victim with a few deft strokes in the closing passages—an artistic choice that articulates her profound sympathy for this marginalized child-as-Other. Yet Laurence's narrative ambition extends far beyond mere sentimental compassion; by weaving the parallel fates of Harvey and Nanuk into the fabric of Manawaka's stratified society, she constructs a searing critique of systemic marginalization that transcends the boundaries between human and animal.

Laurence's deliberate narrative inversion compels readers to confront an uncomfortable truth: marginalization operates as a cyclical mechanism of violence, where the oppressed are at risk of becoming oppressors in turn. Harvey's redirection of his accumulated rage toward Nanuk, a fellow "Other" deemed powerless by the dominant social order, mirrors the way in which systemic deprivation distorts the humanity of those trapped within its grip. Similarly, Nanuk's status as a half-breed dog, rejected and mistreated in a society that values purity of lineage, echoes the plight of Harvey—a poor white youth rendered "invisible" by the middle- and upper-class white residents. Laurence's nuanced portrayal of Harvey and Nanuk challenges readers to reject simplistic moral judgments and instead recognize the interconnectedness of all marginalized lives.

3. Conclusion

In A Bird in the House, Margaret Laurence artfully mirrors the marginalized groups and the animals that are also framed as the “Other” with delicate brushstrokes. While conveying deep concern for the underprivileged in Manawaka, she also demonstrates the exquisite ingenuity of her literary craftsmanship. Interpreting the symbiotic relationship between humans and animals from the perspective of the “Other” not only yields fresh insights into the work, but also enables readers to grasp the author’s profound humanistic sentiments.

Constrained by the limitations of her times, Laurence did not propose concrete solutions to address the existential predicaments of the marginalized. Nevertheless, her works compel readers to confront these pressing social realities, laying a foundation for subsequent social reforms and targeted interventions. In this sense, her literary creations possess remarkable artistic merit and ideological depth, and thus deserve the sustained attention of global readers.

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Mirrors and Lamps of *The Waste Land*: The Representational Dilemma and Perspectivism's Redemption in T.S. Eliot's Poetics

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Abstract

This article takes the language crisis in T.S. Eliot's *The Waste Land* as a starting point to explore the profound impact of the 20th-century linguistic turn in philosophy on poetic creation and interpretation. It systematically traces the theoretical evolution from representationalism to expressionism, culminating in perspectivism. The representationalism of analytic philosophy, viewing language as a mirror of the world, excluded poetic and other non-referential discourse. Conversely, the expressionism of continental philosophy saw poetry as a lamp disclosing existence, emphasizing its truth-revealing function, yet it often fell back into metaphysical traps. The article proposes that a perspectivist poetics emerges at the intersection of Nietzsche's and Wittgenstein's thought. This approach contends that poetry does not reflect or reveal a transcendental truth but constructs meaning through specific perspectives. Readers participate in the poetic language-game via the mechanism of "seeing-as", co-generating poetic truth through multiple interpretations. *The Waste Land*, with its fragmented structure, polyphonic voices, and intertextual collage, perfectly embodies this perspectivist poetics—it rejects a single interpretation, inviting readers to experience the complex landscape of the modern waste land through shifts in perspective, making the poem itself a philosophical practice for training perception and reshaping worldviews.

Keywords: The Waste Land, representationalism, expressionism, perspectivism

1. Introduction

> --Yet when we came back, late, from the hyacinth garden,
>
> Your arms full, and your hair wet, I could not

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Speak, and my eyes failed, I was neither

Living nor dead, and I knew nothing.

Looking into the heart of light, the silence.

Oed' und leer das Meer.

—T.S. Eliot

These lines from "*The Waste Land: The Funeral of the Dead*" which depict the Hyacinth Girl are the most tender moment in the entire poem. Here, the hyacinths, the hyacinth garden, and the hyacinth girl with her full arms and wet hair symbolize vibrant life in the wasteland—the rebirth of spring, the yearning for pure love, and the desire for the joy of sexual union in harmony with the cosmic rhythm. Yet immediately behind this vibrant hyacinth garden lies a state where "I could not/ Speak, and my eyes failed, I was neither/ Living nor dead, and I knew nothing. / Looking into the heart of light, the silence." (T.S. Eliot, 2004, p. 54) Communication with the Hyacinth Maiden clearly breaks down, for "I" cannot open my mouth, unable to speak.

A similar fragment appears in the subsequent second chapter, "A Game of Chess": "Footsteps shuffled on the stair. / Under the firelight, under the brush, her hair/ Spread out in fiery points/ Glowed into words, then would be savagely still." (T.S. Eliot, 2004, p. 57)

Here, the women in "A Game of Chess" perhaps due to conflict or anxiety, are eager to express themselves and yearn to communicate. Yet, their words, like "fiery points", ultimately fail to be spoken out, subsiding into "savagely still".

If the predicament of speechlessness in The Waste Land is merely the faintly flickering awkwardness of an individual modern soul, then *Four Quartets* bluntly reveals the universal modern condition of being unable to speak or express oneself:

Words strain,

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Crack and sometimes break, under the burden,

Under the tension, slip, slide, perish,

Decay with imprecision, will not stay in place,

Will not stay. (T.S. Eliot, 2004, p. 175)

In Eliot's view, modern language has degenerated into an empty shell, adrift in time and space. The verbal effort of each moment is ultimately swallowed into the vortex of senseless babble, incapable of expressing the heart's intent: "Trying to learn to use words, and every attempt/ Is a wholly new start and a different kind of failure/ Because one has only learnt to get the better of words/ For the thing one no longer has say, or the way in which/ One is no longer disposed to say it. And so each venture/ Is a new beginning, a raid on the inarticulate/ With shabby equipment always deteriorating/ in the general mess of imprecision of feeling, / undisciplined squads of emotion." (T.S. Eliot, 2004, p. 182) Clearly, this represents the language crisis and expressive crisis felt by Eliot and his contemporary writers. This inadequacy of the definite poetic language felt by many poets at one time or another is undoubtedly related to the broader context of the language revolution occurring in the early twentieth century.

As is well known, the 20th century witnessed the linguistic turn in philosophy, which held that philosophical problems originate in language. However, this was predicated on the more fundamental metaphysical turn in language studies, namely a focus on the essence or essentialism of language. In other words, Plato's framing of poetry as the 'other' of philosophy appears to have remained effective throughout much of human history. Undoubtedly, both the linguistic turn in philosophy and the metaphysical turn in language studies exerted a profound influence on artists like T.S. Eliot and his contemporaries, for whom language served as the primary medium.

2. The Dilemma of Representationalism and Its Literary Exclusion

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In fact, during modern philosophy's linguistic turn, interpretations of language's essence revealed profound theoretical divergences. This divergence manifested most starkly in the stark opposition between analytic and continental philosophy regarding the status of poetic language: continental philosophy regarded poetry as the embodiment of language's essence, while the analytic tradition continued Plato's expulsion of poetry, insisting that logic constitutes language's core characteristic. This opposition fundamentally represents a clash between two conceptions of language: the analytic tradition, grounded in the representational conception, emphasizes language's referential function to the world, while the continental tradition, characterized by the expressive conception, prioritizes language's expressive practice.

In the evolution of contemporary philosophy of language, despite attempts to integrate both approaches, semantics grounded in referential theory has remained dominant. This supremacy stems from analytic philosophy's adherence to "correspondence theory of truth"—the notion that a proposition's truth value depends on its correspondence with worldly facts. Within the referential framework of semantics, the fundamental concept of truth is correspondence: a statement is true if it corresponds to a fact. Consequently, this correspondence theory of truth relies on a representational relationship between language and the world—and language representing it like a mirror. Thus, representationalism rests on two assumptions: content and correspondence.

Frege, the founder of analytical philosophy, constructed an exclusive linguistic philosophy by rigorously distinguishing between the "meaning" (Sinn) and the "coloration" (Färbung) of symbols. Within this system, only propositions with definite referents possess cognitive significance, while literary expressions like poetry, lacking clear referents, are deprived of the capacity to bear truth values. Although Russell's theory of predicates alleviated the problem of empty references to some extent, its theoretical presuppositions still marked literary language as an abnormal phenomenon requiring "treatment".

Early Wittgenstein (1921) pushed this stance to its extreme in the *Tractatus Logico-Philosophicus*, explicitly declaring: "The right method in philosophy would be this: to say nothing except what can be said, i.e., the propositions of natural science." (Ludwig Wittgenstein, p. 104) Only scientific propositions can be spoken; all others must remain silent, for they cannot be meaningfully expressed in language: "There is indeed the inexpressible. This shows itself; it is the mystical." (Ludwig Wittgenstein, p. 105) More precisely, what cannot be expressed in language are ethics and aesthetics. This assertion not only consigns the realms of ethics and aesthetics to the "unspeakable" but fundamentally denies the philosophical relevance of literary discourse, thereby forming a radical tendency towards linguistic purification.

At the same time, while Saussure's structural linguistics challenged referential theory, it fell into another form of metaphysics. He shaped the linguistic system (langue) into a Platonic world of ideas transcending concrete speech (parole). While denying the direct correspondence between words and things, he simultaneously constructed an abstract formal system that determines concrete linguistic practice. Although this theoretical orientation differs from the representationalism of analytic philosophy, it similarly demonstrates a pursuit of idealized linguistic forms.

Notably, both theoretical traditions encounter similar predicaments when confronting

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literary language: they either treat literary expression as a disruptive element to be excluded (as in the analytic tradition) or reduce it to an accidental realization of the linguistic system (as in structuralism). This shared exclusionary stance exposes the fundamental limitation of the representationalism paradigm—its inability to accommodate the indispensable poetic dimension inherent in linguistic practice. The ubiquitous metaphorical expressions in everyday communication and the rich meaning-generation in literary creation continuously challenge representationalism's simplified understanding of language. When philosophy becomes fixated on constructing an ideal language, it paradoxically loses the theoretical capacity to grasp the complexity of real language.

The representationalism pursuit of an "ideal language" ultimately diverges from the richness of real language. It is precisely this disconnect that led T.S. Eliot to lament that "modern language is dead"—when philosophy reduces language to a puppet of logic or form, living expression becomes the sacrifice of theory:

> That was a way of putting it—not very satisfactory:
>
> A periphrastic study in a worn-out poetical fashion,
>
> Leaving one still with the intolerable wrestle
>
> With words and meanings. The poetry does not matter.
>
> It was not (to start again) what one had expected. (T.S. Eliot, 2004, p.179)

In fact, the distinctiveness of poetic and literary language lies not in avoiding linguistic ambiguity and polysemy, but rather in embracing them as the core mechanism for generating meaning. As Gadamer observed, "Poetic language breaks through the boundaries of everyday language." This breakthrough precisely exposes the narrowness of

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representationalism views of language, suggesting the need to seek richer modes of meaning interpretation beyond referential theories.

3. From Representationalism to Expressionism

In his renowned essay "*On Truth and Lie in a Nonmoral Sense*", Nietzsche contends that language does not directly reflect reality but is instead constructed through a dual metaphorical transformation. The first metaphor involves the direct sensory impressions formed by neural stimuli from the external world being converted into sensory images (such as visual or auditory forms). The second metaphor involves the transformation of sensory images into words or sound symbols. Once words become fixed through social convention, they gradually lose their original sensory uniqueness, becoming abstract concepts. The core of Nietzsche's critique of concepts lies in their imposition of homogeneity, that's conceptual generalization which leads to the disappearance of the sensory world. Nietzsche termed this "the death of metaphor"—language stiffens from vivid metaphor into cold concepts. This linguistic mechanism enables humanity to construct a so-called "real world" beyond the world of appearances through language, thereby creating philosophical myths: people mistakenly believe concepts can grasp "essence" or "truth". In reality, this dualism between the real world and the world of appearances is a metaphysical error, the "longest error" that must be overcome. Thus, Nietzsche exposed the "myth" of representationalism underlying language, thereby critiquing the view of its divine origin.

Wittgenstein's "language games" (Philosophical Investigations) similarly criticize the tendency to abstract language from concrete usage. For instance, the term "game" cannot be uniformly defined; it only makes sense within specific activities. His solution, therefore, is to

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return words to their "ordinary usage", as meaningless metaphysical propositions lack verifiable everyday usage and are merely products of language spinning its wheels.

Thus, despite subtle methodological differences, Nietzsche and Wittgenstein shared a similar goal: rejecting representationalism. This idea evolves toward romanticism, aligning with M.H. Abrams' (1977) conception of language—shifting from a "mirror" to a "lamp" that actively illuminates rather than passively reflects the world.

Representative figures of German romantic-expressionist linguistic philosophy—Herder, Hamann, Humboldt, and Lichtenberg—each opposed the metaphysical conception of language in their own way—a language where meaning possesses a fixed essence. They contended that language does not passively "reflect" pre-existing reality but rather discloses new possibilities, functioning as a site of "disclosure". This expressionist conception of language is immanent in the world's manifestation, dissolving the language-world dichotomy.

Clearly, within the romantic conception of language, language is not a "mirror" but a "lamp"—incapable of directly reflecting the world, yet capable of illuminating and revealing it. Meaning is the product of interpretation, not a fixed endowment. Language participates in the construction of the world.

Against this backdrop, when language fails to "represent the world truthfully", philosophy must turn to poetic expression, bringing poetry and philosophy closer together. Schlegel even argued that "poetry and philosophy should become one," and that "philosophy must be poetic," since both explore meaning through creative language rather than pursuing fixed truths.

The fusion of poetry and philosophy finds its concentrated expression in Heidegger's

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philosophy of poetry. He held that the common ground between philosophy and poetry lies in language. Both philosophy (Denken) and poetry (Dichten) essentially "say" (Sagen) a certain "being" (the existence of beings) through language. Thus, they are not opposites but two distinct "ways of saying" through language. Philosophy inquiries into being through concepts, while poetry reveals the openness of place through imagery. Both rely on language to unfold their essence. Consequently, philosophy and poetry are interconnected, mutually altering their perspectives within this relationship. The boundary between them has never been fixed; it constantly shifts through mutual influence, their definitions dialectically constructed through their relationship. Heidegger's shift marked a leap in the philosophy of language from epistemology to ontology. For him, poetry ceased to be merely an aesthetic object and became a crucial mode of being's disclosure.

Clearly, this line of thought from Nietzsche to Heidegger not only dismantled the traditional representational theory of language but also established a new paradigm for understanding language as the source of meaning, thereby transforming language from a "mirror of the world" into a "light of Being". However, although the essence of language is metaphorical, humanity must forget this metaphorical nature for the sake of stability and effectiveness in existence, mistakenly accepting abstract concepts and symbols as "truth" itself. This forgetting prevents humans from perceiving new things, thus leaving the discovery and creation of novelty to artists. Hence, "art is the only place where the 'drive to form metaphors', this 'fundamental human drive', is free." (Philip Mills, 2022, p. 19)

The Waste Land, a pinnacle of modernist poetry and the quintessential fusion of poetic and philosophical thought, stands as the paramount embodiment of expressionism that

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enables humanity to perceive anew. The poem's opening lines present a collapse of language: "April is the cruelest month, breeding/ Lilacs out of the dead land……" (T.S. Eliot, 2004, 54) In traditional pastoral poetry, April symbolizes vitality, yet Eliot describes it as "cruel", directly subverting the established symbolic language system. Examples of linguistic distortion and the rupture between language and reality abound throughout the poem. Consider the line "Dry bones can harm no one" In *Book of Ezekiel*, dry bones symbolize divine redemption, yet Eliot rewrites this as the ultimate state of death, rendering the religious narrative ineffective. Consider the "unreal city" in the poet's vision: London, shrouded in morning mist, transforms into Dante's hell. The city's prosperity is hollowed out, leaving only a crowd of the walking dead: "A crowd flowed over London Bridge, so many, / I had not thought death had undone so many."(T.S. Eliot, 2004, 62) The symbolic system of the modern metropolis collapses, and language fails to describe the true state of urban existence. The most extreme "linguistic rupture" manifests in the poem's frequent "quotation fractures". For instance, in the second section, "A Game of Chess", lines 141, 152, 165, 168, and 169 each repeat: "HURRY UP PLEASE ITS TIME." Reportedly a common closing-time prompt in British pubs, it abruptly interrupts the dialogue between the speaker and Lyl. Some interpret this as a voice-over warning or proclamation from the wasteland's inhabitants, while others see it as the speaker's pointed urging to Lyl: "Hurry, or Albert will be back soon." In any case, this distorted, fractured, and misplaced language precisely reveals modern society's ultimate predicament: people still cling to outdated symbolic systems—be it religion or mythology — yet these can no longer organize experience, instead becoming absurd performances. This is precisely the consequence of the "death of metaphor"—language is no

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longer a living metaphor, but a hollowed-out corpse, and humanity still uses it futilely to comprehend the world.

Secondly, the very structure of *The Waste Land* itself employs techniques typical of expressionism—fragmentation, leaping transitions, and collage. From the streets of London to the myth of the Fisher King, from historical figures like Countess Marie, Cleopatra, Philomela... to the modern urbanites "I" and Lyl, the female typist and male broker, from Christianity to Buddhism, from ancient Egyptian resurrection myths to the Fisher King legend... Time and space continually fracture and reassemble within the poem. This discontinuous narrative aligns with expressionism's rejection of traditional linear logic, emphasizing the complexity and absurdity of modern experience. As for the diverse languages appearing in the poetry—Latin, Greek, Sanskrit, German, French, and various literary allusions—these are all deliberate "textual collages" crafted by Eliot. This technique is not intellectual ostentation, but rather a reflection of the fragmented modern psyche—humans can no longer find meaning within a coherent narrative, but only piece together fragmented cultural fragments to construct understanding. Just as the brushstrokes of expressionist painters like Munch or Kandinsky brim with distortion and turbulence, the verses of *The Waste Land* employ disjointed language to depict the desolate landscape of the wasteland and the spiritual crisis of its inhabitants.

4. From Expressionism to Perspectivism

Yet it remains doubtful whether Romantic Expressionism truly ended metaphysics. They asserted that poetic language transcends the constraints of everyday speech, serving as an instrument for divine revelation or truth disclosure. The poetic function of language

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possesses metaphysical priority, capable of touching a higher reality. This suggests their linguistic philosophy retained a metaphysical dimension. “First, the idea of disclosure suggests that there is something hidden to disclose, perhaps of the kind of the metaphysical true world that Nietzsche criticizes. It suggests that there is a reality beyond or behind the veil of the appearances, behind our everyday language. Second, related to the first point, there is a sacralization of poetry that leaves the ordinary aside.” (Philip Mills, 2022, p. 48) They exaggerated the poetic use of language. Consequently, in their attempt to balance metaphysics, Romantic expressionism lapsed into another form of metaphysics. Simultaneously, it failed to account for the practicality and plurality of poetic language—namely, why truths revealed by different poems might conflict.

Consequently, the philosophy of language shifted toward pragmatic expressionism. “This concept refers to an essentially different tradition, including figures such as Robert Branden, Hugh Price, and Simon Blackburn”, but “also encompasses the early Heidegger and the later Wittgenstein.” (Philip Mills, 2022, p51; 52) Among them, Price proposes the view that “language is a projector”. He “suggests thinking of language on the model of a holographic data projector, not just a lamp that illuminates (and shadows) various aspects of the world”; he also puts forward the metaphor of language as a “‘key’ which is shaped both by the lock and by the hand that it fits.” Thus, “language is not just a way of shaping the world, but also a way of interacting with it.” (Philip Mills, 2022, p55; 56)Here, Price’s holographic projector metaphor resonates with Heidegger’s view of language: language is not a tool, but the clearing in which Being manifests itself. Pragmatism holds that language constitutes the world, rather than merely reflecting it. However, the core claim of

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pragmatism still lies in the idea that “language has a rationalist center” (Philip Mills, 2022, p. 61), meaning that inferential practices must be regarded as the center of language, while poetry, metaphor, and other non-discursive discourses can only belong to the “suburbs”. This claim marginalizes the uniqueness of poetry, reducing it to just one ordinary “language-game”, and fails to adequately explain why poetry can undertake irreplaceable cultural functions in human practices, such as in religious rituals or as a vehicle for collective memory.

How can we find a linguistic philosophical path between the limitations of two forms of expressionism — Romantic expressionism and Pragmatic expressionism — that both explains the uniqueness of poetic language and avoids metaphysics or reductionism? Philip Mills argues that clues to this middle ground lie at the intersection of the linguistic views represented by Nietzsche’s Romantic expressionism and Wittgenstein’s Pragmatic expressionism. This middle path ultimately steered expressionism toward perspectivism.

Perspectivism stands as a core tenet of Nietzsche’s philosophy, asserting that all knowledge, truth, and morality are products of specific perspectives rather than objective, eternal “reality”. As he wrote in Beyond Good and Evil: “There are no facts, only interpretations.” Truth does not exist objectively independent of the observer but is an interpretation of the world through a particular viewpoint. In his view, all cognition is “perspectival”. Humans, and even animals, can only understand the world through their own limited conditions—such as their bodies, language, and culture—just as different eyes (like an insect’s compound eyes or a human’s monocular vision) perceive different “realities”. Therefore, there is no “eye of God”; only diverse, competing perspectives exist.

Nietzsche’s conception of poetry is etched into his anti-Platonism and his

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understanding of Greek tragedy. In *The Birth of Tragedy,* he posits that poetry is not "decoration" or "fiction" (the traditional view that poetry is an "untrue" imagination); rather, poetry strips away the "deceptive garments" of culture (society's assumed "reality") to directly express life's primal impulses (as in Dionysus's ecstatic frenzy). Poetry does not attempt to disguise truth with concepts but directly presents the chaotic essence of the world through imagery, emotion, and rhythm. If the poet is "one who understands the world" (i.e., penetrates life's truth through poetic language), what then is the reader's task? Traditional reading theory holds that readers must analyze elements like rhetoric and metaphor to uncover the author's "intent" or "truth". Nietzsche counters this, arguing that such reading still relies on "correspondence theory", attempting to rationally "reduce" poetry's meaning. Yet truth is not "revealed" but experienced. Thus, the new task for the Nietzschean reader is to participate in the generation of poetic truth. The reader is not a passive recipient but an active "experiencer of life". Poetry does not offer stable "information" but invites the reader into a state of being—what Nietzsche called "intoxication" or "dreaming". The relationship between reader and poetry resembles that of participants in Dionysian rituals — not "understanding" the god of wine, but "becoming" him through dance and music.

As the expressionist starting point of pragmatism, Wittgenstein proposed the "language game" theory, positing poetry as a unique linguistic game whose meaning derives from shared rules of usage—such as those governing ritual, lyricism, and metaphor. Unlike pragmatic reductionism, Wittgenstein acknowledged the incommensurability of different language games, implying that poetry and scientific language serve distinct functions without the former being inferior. Moreover, "for Wittgenstein, the musicality and expressiveness of

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poetic language also play a crucial role: ‘The way music speaks. Do not forget that a poem, even though it is composed in the language of information, is not used in the language-game of giving information’ (Z 160). There is a similarity between understanding music and understanding poetry, for they both are a particular language.” (Philip Mills, 2022, p103)

In exploring the relationship between poetry and music, Wittgenstein examined the concept of “understanding”. His reflections on “poetic understanding” stem from the discussion of “meaning is use” in *Philosophical Investigations*, which is often applied to analyze how readers engage with poetry. The central question in this discussion concerns whether the meaning of poetry depends on the author’s intent and how readers “understand” poetic lines that cannot be logically reduced. Wittgenstein contends that understanding poetry is not about deciphering codes but participating in a “language game”—readers engage with the poem’s specific usage, such as metaphors or unconventional syntax, rather than seeking a “correct interpretation”. This participation in the “language game” leads to another of Wittgenstein’s concepts: “seeing as”. “Seeing-as” bears some resemblance to interpretation and to imagination. It originates from Part II of Wittgenstein’s *Philosophical Investigations*, where he uses the “duck-rabbit diagram” to illustrate how the same image can be “seen as” either a duck or a rabbit, depending on the subject’s perceptual projection. Here, the concept of “seeing-as” is extended to the reading of poetry. Poetic language, such as the metaphor “time is a river”, demands readers to “see” the words as carrying non-literal meanings. This capacity lies at the heart of creative reading. When language reconstructs experience, poetry reading becomes a “training in worldviews”, a philosophical tool for reshaping perception. This approach breaks down disciplinary barriers while offering new theoretical resources for

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understanding the obscurity of modern/postmodern poetry.

Integrating Nietzsche's dual metaphor theory reveals its resonance with "seeing as". "Seeing as" constitutes the fundamental mechanism of metaphorical operation—it embodies "perspectival interpretation": we do not perceive things "objectively", but rather through interpretive lenses, such as the "perspectives" Nietzsche described.

Thus, at the intersection of Romantic expressionism and pragmatic expressionism—the very point where Nietzsche and Wittgenstein converge—a poetic philosophy of language emerges: perspectivist poetics. Clearly, its theoretical foundation stems from Nietzsche's "perspectival" conception of truth, insisting that all cognition and meaning originate from interpretations rooted in specific viewpoints. Building upon this, poetry neither reveals some truth nor mirrors the world; rather, it constructs a mode of interpreting the world through language. It is also a unique "language game" that invites readers to participate through techniques like metaphor, rhythm, and syntactic leaps. Here, Wittgenstein's concept of "seeing-as" becomes the pivotal mechanism: through perceptual projection during reading, the reader "sees" the text as carrying non-literal meanings. This process is creative and experiential, not passive reception of fixed information. Thus, during reading, the reader ceases to be a passive decoder of meaning and instead becomes an active "experiencer of life", akin to participants in Nietzsche's Dionysian rites. Through poetry, they enter a state of being (such as "intoxication" or "dreaming") and co-create poetic truth through interaction. Consequently, the meaning of poetry depends on the specific context of use and the reader's mode of engagement.

It is evident that "perspectivist poetics" does not simply juxtapose Nietzsche's perspectivism with Wittgenstein's philosophy of language, nor does it merely apply the established framework of reader-response criticism. Rather, it creatively establishes a generative and practical poetic operational pivot between the two. It concretely transforms Nietzsche's epistemological principle—"there are no facts, only interpretations"—into a poetic methodology concerning how meaning in poetry is generated. Simultaneously, it represents a literalization and agential expansion of Wittgenstein's philosophy of language.

Since its publication, T.S. Eliot's *The Waste Land*, with its obscure allusions, fragmented structure, and polyphonic voices, has been a labyrinth of interpretation for critics. Traditional readings often sought a unifying theme or the author's hidden intent, as if the poem contained an ultimate truth to be deciphered. In recent years, scholars have also approached *The Waste Land* from the reader's perspective. For instance, Owojecho Omoha's *Capture Theory: Battling with Tropes* in T.S. Eliot's *The Waste Land*, studies the relationship between the writer and the reader, in particular how the author engages a disengaged and world-weary public imagination in Europe after the First World War. However, from the vantage point of perspectivist poetics, *The Waste Land* is not a puzzle to be "solved" but rather a "language-game" arena that invites the reader to participate in the co-creation of meaning. It perfectly embodies Nietzsche's "there are no facts, only interpretations" and Wittgenstein's "meaning is use" and "seeing-as" concepts, constituting a thoroughgoing practice of perspectivist poetry. While Romantic expressionism sought to reveal a unified, higher reality through poetry, *The Waste Land* fundamentally rejects this metaphysical pursuit.

The poem opens by declaring: "April is the cruelest month," while winter is depicted as keeping "us warm." This inversion of traditional pastoral imagery immediately establishes the poem's perspectival nature: the world is not inherently harmonious or divine; its meaning depends on who is looking and how. Subsequently, the poem paints a picture of a living death: "stone rubbish," "dead trees," a heap of " broken images," "dry stone," "the cricket" ... These fragmented images are not randomly assembled; they invite the reader to engage in a continuous operation of "seeing-as." As the reader synthesizes these fragments, they personally experience the "waste land" first and foremost as a sensory, emotional, and cultural composite—a fragmented mode of perceiving the world.

Then the Fisher King and the hyacinth girl appear. The Fisher King, rendered impotent, is "neither / Living nor dead." (T.S. Eliot, 2004, p. 62) Gazing at the radiant Grail held by the hyacinth girl, he "could not/ Speak, and" his "eyes failed". (T.S. Eliot, 2004, p. 62) Filled with fear and frustration, he asks the "clairvoyante" (T.S. Eliot, 2004, p. 62) Madame Sosostris to divine his fate and that of his kingdom using Tarot cards. Madame Sosostris presents six cards: "the drowned Phoenician Sailor," "Belladonna, the Lady of the Rocks," "the man with three staves," "the Wheel," "the one-eyed merchant," and "the Hanged Man." Eliot provides no authoritative interpretation for these cards, deliberately deviating from the traditional Waite deck. This constitutes a quintessential arena for "seeing-as." In this unconventional Tarot reading, we can "see" the "drowned Phoenician Sailor" as the Death card, representing an end to fate; or as a sacrificial deity like Adonis from *The Golden Boug*h; or as a victim of modern desire. Each act of "seeing-as" opens a different path of meaning. The "one-eyed merchant" can be "seen as" the almsgiver on the Six of Pentacles, but more likely "seen as" a modern individual blinded in one eye by material desire. Crucially, the line "which I am forbidden to see" (T.S. Eliot, 2004, p. 62) precisely metaphors the opacity of

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meaning and the limitation of "seeing-as"—there is always a remainder that no single perspective can encompass. This methodological insight highlights that the poem's structure is not an inlay of fixed symbols, but an apparatus designed to stimulate multiple acts of "seeing-as." Readers, based on their familiarity with different intellectual systems—anthropology, Christianity, Buddhism—will project differently, thereby collectively weaving the poem's rich web of meaning.

In the ensuing sections, the poet continuously presents myriad interwoven and conflicting perspectives: the luxurious indolence of an aristocratic woman is juxtaposed with the vulgar conversation of working-class women in a pub; the once pure and sacred nymphs of the Thames are paralleled with anonymous, violated women in the modern metropolis; the exhortations of the Buddha stand alongside the confessions of St. Augustine; the Greek myth of Philomela intertwines with the Egyptian myth of Osiris... These perspectives compete, complement, and subvert one another, collectively constituting the core metaphor of the "waste land." The "waste land," therefore, is not an objectively existing, physical locale awaiting redemption, but rather the sum total of the spiritual world as experienced by countless modern individuals from their specific vantage points. There is no single, true "waste land"; there is only a world "seen-as" a waste land from countless perspectives—the London pub, the typist's flat, the Eastern European city. Furthermore, within *The Waste Land*'s vast, complex, and uniquely-ruled language-game, amidst Eliot's profuse references to myths and allusions, when the reader "sees" Roman debauchery "as" modern emptiness, the medieval Grail quest "as" a metaphor for the modern spiritual search, or seemingly isolated "a heap of broken images" "as" part of a larger pattern, they have already achieved a

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superimposition and transformation of perspectives, accomplishing a creative act of imaginative synthesis.

"Death by Water" is the shortest section of the entire poem, yet one of the richest. Water is both the sea of desire that swallows life and the fountainhead that gives life. This is not a simple symbolic paradox but rather the superimposition of coexisting, competing perspectives upon a single image. "Seen-as" from a natural-mythological perspective, water is the Nile, the medium of life's cycle, integrating drowning and resurrection. "Seen-as" from a Christian perspective, water is both baptismal holy water and the abyss of sin that engulfs Phlebas. "Seen-as" from a modern psychological perspective, water is the subconscious, the flood of desire that drowns the individual, embodying both "profit and loss."(T.S. Eliot, 2004, p. 71) The poem does not adjudicate which perspective is "true"; instead, it allows them to be simultaneously present, forcing the reader to navigate between different acts of "seeing-as." Eliot compresses all these perspectives within a few lines; they simultaneously penetrate the core image of "death by water." The reader's understanding is not a choice of one over others but an enduring of the superimposed effect of this multiplicity of "seeing-as," experiencing this death as both concrete and symbolic, both ancient and modern. The image thus becomes an infinitely refracting prism, its depth of meaning lying precisely in the superimposability of perspectives.

In the final stanza of the poem, the Fisher King reappears: "Fishing, with the arid plain behind me" (T.S. Eliot, 2004, p. 69) Facing the sea, he is evidently contemplating the teachings just imparted by the thunder: "Datta" "Dayadhvam" "Damyata". Behind him lies the "arid plain", the fallen London Bridge, which the Fisher King seems to disregard, merely

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asking himself: “Shall I at least set my lands in order?” The poet then employs four allusions — “fire”, “the swallow”, “the tower”, and “Hieronymo”—to reconstruct a hellish, prison-like waste land, saturated with lust and betrayal. These visions of the waste land’s totality flash before the fishing Fisher King like a slideshow, intermittently accompanied by the thunder’s refrain: “Datta, Dayadhvam, Damyata”. The poem then abruptly concludes with the triple prayer “Shantih”. Evidently, the poet provides no definitive answer regarding redemption. As readers, one might seek salvation through the Hyacinth Girl, who symbolizes primal vitality; or find liberation in the Buddha’s “Fire Sermon”; attain deliverance through St. Augustine’s “Confessions”; or discover resolution in the “*Upanishads*”. The poem presents the problem—desolation—along with fragmentary possibilities of redemption: the Hyacinth Girl, the thunder’s injunction, moments of compassion, Eastern wisdom. Yet it offers no certain path to salvation, only a collection of fragmented instructions: “These fragments I have shored against my ruins.” (T.S. Eliot, 2004, p. 69) This is not a confession of despair, but a challenge to the reader: to piece together meaning through their own perspective.

Regarding the wasteland’s redemption, Eliot refuses to offer a “standard answer”, for truth (if it exists) can only temporarily manifest through the reader’s creative interpretation. The ultimate attainment of meaning depends on the reader’s own shift in perspective and life experience after engaging with the entire linguistic game. Thus, the “truth” of *The Waste Land* lies in the shock, reflection, and potential insights born from the act of reading itself—a Nietzschean “intoxication” that trains the reader’s worldview and reshapes their perception after navigating language’s labyrinth. As Nietzsche advocated, the reader is not a passive recipient but an active “experiencer of life”. We do not “analyze” *The Waste Land*; rather, through the act of reading, we "experience" its aridity, its contradictions, its chaos, and its yearning.

5. Conclusion

We do not "discover" the world; we "create" it through metaphor, metaphorical perception, and perspective—and poets, philosophers, and artists are the masters of this creation. Thus, poetry and art may be better than science or religion at describing existence, for they allow multiple viewpoints to exist and coexist. At the same time, poetry requires a kind of reading that reveals the distinction between ordinary language and poetic language is not one of kind (ontological, semantic, or syntactic), but of perspective and interpretation.

The greatness of *The Waste Land* lies precisely in its abandonment of Romanticism's ambition to reveal transcendental truths, and its rejection of Pragmatism's tendency to reduce it to ordinary discourse. It candidly acknowledges the perspectival and constructed nature of meaning, creating a powerful "language game" field through its epic fragmentation. It compels readers to abandon the illusion of seeking a singular authorial intent, transforming them instead into active participants. Through the capacity to "see as", they engage in the collision of multiple perspectives and the symphony of ancient and modern language, personally practicing and experiencing the complex meanings of "desolation" and "redemption". Ultimately, *The Waste Land* itself becomes part of the world it describes: it is both diagnosis and ritual; both a shattered mirror and a perspectivist training in learning how to "see" anew and how to "survive" anew amidst the fragments.

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Towards Cognitive Intelligence in Financial Document Analysis: A Multimodal LLM Framework for Risk Reasoning and Due Diligence

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Abstract

Financial due diligence requires intensive analysis of vast unstructured documents (e.g., contracts, statements, invoices). However, traditional manual processing is inefficient, costly, and prone to subjectivity, and the existing automation solutions primarily focus on single-modal text recognition, lacking the capacity for joint understanding of multimodal features (e.g., layout, seals, table structures) and deep risk reasoning. This study proposes an end-to-end framework based on a Multimodal Large Language Model (MLLM) to bridge this gap. The framework not only performs accurate multimodal information extraction but also, integrates domain-specific knowledge (e.g regulatory clauses) to emulate expert-like reasoning. By constructing a dynamic risk knowledge graph that captures entities and relations across documents, it enables cross-document correlation analysis and anomaly detection. We will validate the framework on curated financial datasets, assessing both its information processing accuracy and risk diagnosis capability. Our contributions are threefold: 1) providing a novel computational linguistics solution that addresses the semantic and pragmatic challenges in financial document understanding; 2) advancing financial AI from perceptual to cognitive intelligence through explainable, knowledge-integrated reasoning; 3) offering a transparent, automated decision-support tool for high-stakes due diligence.
Keywords: multimodal large language Model (MLLM), cognitive intelligence, due diligence, risk reasoning, knowledge graph, explainable AI (XAI)

1. Introduction

The escalating volume and complexity of financial transactions have rendered traditional, manual due diligence processes increasingly untenable for financial institutions. In critical

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domains such as syndicated lending, mergers and acquisitions, and trade finance, the assessment of counterparty risk hinges upon the exhaustive analysis of a vast corpus of unstructured and multi-format documents—including financial statements, legal contracts, invoices, and guarantees (Zhang et al., 2020). Reliance on human experts for this task introduces significant bottlenecks, characterized by prohibitive labour costs, protracted turnaround times, and an inherent susceptibility to subjective bias and oversight (Zhang et al., 2020). This operational inefficiency not only escalates operational risks but also directly impedes financial innovation and inclusivity by increasing the cost of capital.

In response, the financial technology (FinTech) sector has pursued automation through computational methods. Initial approaches leveraging Optical Character Recognition (OCR) and rule-based natural language processing (NLP) have achieved partial success in structured data extraction (e.g., extracting named entities like dates and company names) (Zhang et al., 2020). However, these systems exhibit critical shortcomings from both a technical and financial risk perspective. First, they suffer from semantic blindness, operating merely on a syntactic level and thus failing to grasp the nuanced meaning and financial implications of contractual clauses or narrative disclosures (Devlin et al., 2019). Second, they are characterized by modal isolation, treating documents as plain text and disregarding crucial visual and structural cues—such as layout, seals, signatures, and tabular data—that are paramount for authenticity verification and context interpretation (Xu et al., 2020; Appalaraju et al., 2021). Finally, and most critically, their lack of integrative reasoning creates a fragmented view of risk. For instance, they cannot automatically triangulate a liability reported in a financial statement with a corresponding clause in a loan agreement, nor detect inconsistencies across related documents.

This confluence of limitations has thus exposed a critical cognitive gap in financial automation, where the automation of basic information extraction has not extended to the

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essential, higher-order tasks of risk reasoning and synthesis, which remain manual endeavors. Consequently, this gap constitutes the core unsolved problem at the intersection of AI and financial risk management. Our central hypothesis is that bridging it requires a paradigm shift—from mere data extraction to holistic, interpretative risk reasoning. Accordingly, this paper addresses the development and validation of an integrative AI framework capable of multimodal financial document understanding and automated risk inference, thereby mirroring the analytical depth of a human expert.

2. Literature Review

The cognitive gap identified in the Introduction stems from a historical and technological fragmentation in automating financial document analysis. Closing this gap necessitates an integrative approach that transcends isolated technological advances. This review critically examines the evolution of key parallel tracks—from early rule-based extraction and deep text understanding to modern multi-modal models, knowledge graph reasoning, and explainable AI—that collectively inform, yet individually fall short of, the goal of holistic risk reasoning. By synthesizing these strands of research, we systematically deconstruct the limitations of current paradigms to clearly delineate the research frontier and justify the interdisciplinary architecture of our proposed framework.

2.1 Evolution of Document Processing in Finance

The pursuit of automating financial document analysis has evolved through distinct technological waves. The initial wave was dominated by rule-based systems and template matching, which relied on hand-crafted heuristics to locate and extract pre-defined data points from documents with fixed layouts (Zhang et al., 2020). While effective for highly standardized forms, these systems are notoriously brittle, failing catastrophically with any variation in format or language, and require extensive manual maintenance (Zhang et al., 2020). The advent of statistical machine learning, particularly supervised models for

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classification and sequence labeling, offered more flexibility. For instance, early support vector machines (SVMs) and conditional random fields (CRFs) were applied to tasks like document categorization and named entity recognition (NER) in financial texts. However, their performance was heavily constrained by the need for large volumes of hand-labeled training data and sophisticated feature engineering, which itself was a domain-specific and labor-intensive process (Zhang et al., 2020).

2.2 Natural Language Processing for Financial Text Analysis

The rise of deep learning and pre-trained language models marked a quantum leap in textual understanding. The application of models like BERT and its domain-adapted derivatives (e.g., FinBERT) has set new benchmarks for tasks such as sentiment analysis, contractual clause classification, and financial metric extraction (Liu et al., 2021). These models capture contextualized word representations, significantly outperforming previous methods in understanding the semantic nuances of financial jargon (Devlin et al., 2019). Despite these advances, a critical limitation persists: these models are inherently unimodal. They process text in isolation, remaining blind to the rich visual and structural information embedded in a document's layout, which is often critical for disambiguating meaning. For example, a value in a footer might be a total, while the same value in a header might be a title; a signature block's location validates a document's authority—information completely lost if only text is considered (Xu et al., 2020).

2.3 Multi-Modal Document Understanding

Recognition of the importance of layout has spurred the emerging field of Document AI, which focuses on models that jointly learn from text, vision, and layout. Pioneering works like Layout LM demonstrated that pre-training on text and its 2D spatial coordinates significantly improves document understanding (Xu et al., 2020). Subsequent models incorporated visual features, enabling comprehension of handwritten text, seals, and logos

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(Appalaraju et al., 2021). The state-of-the-art is now represented by Multi-Modal Large Language Models (MLLMs), which leverage the powerful reasoning capabilities of foundation models to process interleaved image and text data (Brown et al., 2020). However, their application to the specific, high-stakes domain of financial risk reasoning—where precision, explainability, and deep domain knowledge integration are paramount—remains nascent and underexplored (Ji et al., 2021).

2.4 Knowledge Graphs and Reasoning in Risk Management

On a parallel track, knowledge graphs (KGs) have emerged as a powerful paradigm for representing and reasoning with structured domain knowledge in finance. A KG structured with entities (e.g., companies, loans) and relationships (e.g., guarantees, violates) enables sophisticated graph analytics, such as uncovering hidden risk exposures through path traversal (Dong et al., 2022). The principal challenge lies in their construction: traditionally, KGs are built through manual curation or semi-automated pipelines that are costly, slow, and difficult to scale. This creates a disconnect between the unstructured data in document troves and the structured knowledge required for reasoning. Therefore, automating the accurate population of a KG directly from complex, multi-modal documents remain a significant open challenge (Ji et al., 2021).

2.5 Explainable AI in High-Stakes Financial Decisions

The deployment of AI in finance is increasingly constrained by regulatory requirements and the necessity for trust, mandating a move beyond predictive accuracy to decision transparency. Explainable AI (XAI) techniques, such as SHAP and LIME, are employed to post-hoc interpret model predictions by highlighting influential features (Lundberg & Lee, 2017; Ribeiro et al., 2016). However, a significant shortcoming of these methods is their potential to generate plausible but not necessarily faithful explanations. Moreover, they often fail to provide the causal, logical reasoning chain demanded by financial auditors and regulators, a problem exacerbated in complex deep learning models. The field is advancing towards intrinsically interpretable architectures and natural language explanations that articulate the reasoning process in a human-comprehensible manner (Cambria et al., 2023).

2.6 Synthesis and Critical Research Gap

A synthesis of the reviewed literature reveals a persistent fragmentation of capabilities: (1) NLP models master textual semantics but are blind to layout and visual cues; (2) Multi-modal Document AI models integrate layout and vision but are designed for generic tasks, lacking embedded financial domain knowledge and dedicated risk inference mechanisms; and (3) Knowledge graphs enable sophisticated reasoning but are bottlenecked by manual or simplistic construction processes. Critically, a pronounced disconnect exists between the advanced perception capabilities of modern MLLMs and the profound reasoning capabilities of curated knowledge graphs, with explainability often treated as an afterthought. This fragmentation fundamentally impedes the achievement of cognitive-level automation in due diligence, which requires seamless integration of perception, knowledge, and reasoned judgment.

Therefore, the salient research gap this work addresses is the absence of a unified, end-to-end framework that seamlessly bridges multi-modal document perception, dynamic knowledge graph construction, and inherently explainable, cognitive risk reasoning. Our proposed framework is designed to integrate these components into a cohesive, interdisciplinary system for automated due diligence, directly targeting this gap.

3. Methodology

This section delineates the technical architecture and implementation of the proposed automated due diligence framework. We begin with an overview of the integrated three-stage pipeline, followed by a detailed exposition of each core module—Multi-Modal Perception, Knowledge Integration, and Cognitive Reasoning. The section concludes with specifics on

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the implementation setup and the composition of the evaluation dataset.

3.1 Framework Overview

To bridge the critical research gap identified in Section 2.6—the fragmentation between multi-modal perception, knowledge construction, and explainable reasoning—we propose a cohesive framework that transforms raw, multi-modal financial documents into actionable risk insights with explicit justifications. As illustrated in Figure 1, the architecture comprises three synergistic core modules: (1) **the Multi-Modal Perception Module**, which parses documents to jointly understand entities and context from text, layout, and visual features; (2) **the Knowledge Integration Module**, which consolidates extracted information into a dynamic Financial Risk Knowledge Graph enriched with formalized domain rules; and (3) **the Cognitive Reasoning Module**, which performs graph-based analytics to identify, validate, and explain complex risk patterns. This end-to-end design ensures a seamless flow from document perception to cognitive reasoning.

3.2 Multi-Modal Perception Module

This module aims to achieve a deep, joint understanding of heterogeneous document elements, overcoming the *modal isolation* of traditional text-only systems. We base it on a pre-trained Multi-Modal Large Language Model (MLLM), fine-tuning a model akin to LayoutLMv3 for its robust document AI performance. The input is a document image or PDF. The model simultaneously encodes textual tokens, their 2D spatial coordinates, and the raw pixel values, allowing the meaning of a word to be informed by its visual context (e.g., a number in a table header vs. in a paragraph). We fine-tune the model for two sub-tasks: **Document Entity Recognition** (tagging entities like Borrower, Loan Amount, Covenant Clause) and **Relationship Extraction** (identifying relations like (Company A, has Obligation, Covenant Y)). The output is a structured JSON representation for each document.

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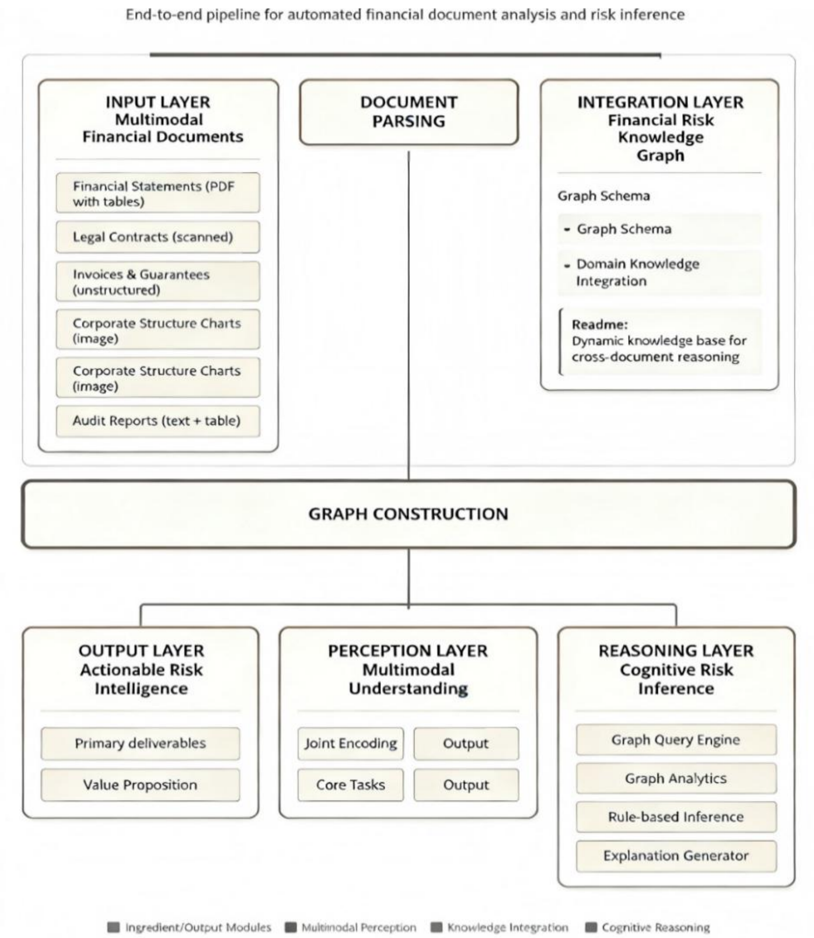
3.3 Knowledge Integration Module

This module addresses the dual challenge of *automating* knowledge graph construction while *embedding* deep domain expertise. Its core is a **Financial Risk Knowledge Graph** defined using an RDF schema co-designed with financial experts, encompassing entity types (e.g., Company, Loan) and relationship types (e.g., guarantees, violates). The structured outputs from the Perception Module are automatically mapped to this schema via transformation rules, populating the KG. Crucially, we perform **Domain Knowledge Injection** by programmatically encoding regulatory rules (e.g., debt-to-equity thresholds) and financial heuristics into the graph as logical rules or node attributes. This creates a semantically rich knowledge base that forms the substrate for advanced reasoning.

Fig. 1 Architecture of the Multimodal Risk Reasoning Framework (MM-RRF)



3.4 Cognitive Reasoning Module

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This module leverages the populated KG to perform risk inference that mirrors expert reasoning. It contains a suite of analytical components: a **Graph Query Engine** (e.g., using SPARQL) to retrieve relevant subgraphs; a **Rule-Based Inference Engine** that applies injected financial rules to flag violations (e.g., covenant breaches) automatically; and a **Graph Analytics Component** that uses algorithms like PageRank to identify systemically important entities. Finally, the **Explanation Generator** ensures trust and auditability. It traces every risk alert back to its source evidence in the KG and original documents, then utilizes the MLLM's natural language generation capability to synthesize this trace into a coherent, human-readable narrative, explicitly citing triggering data and rules. This provides not just a risk signal but a justified, auditable conclusion.

3.5 Implementation and Dataset

The framework is implemented in Python using PyTorch for the MLLM and Neo4j for the Knowledge Graph. For evaluation, we curate a dataset from two sources to balance realism and ground truth availability: (1) Public financial filings (e.g., loan agreements from SEC EDGAR) to provide authentic document complexity; and (2) Synthetically generated documents, crafted with experts to embed specific risk scenarios (e.g., covenant breaches) with precise annotations. This approach enables rigorous benchmarking of our framework's ability to perceive, integrate, and reason about financial risk.

4. Experimental Design and Expected Analysis

This chapter outlines a comprehensive experimental design and details the expected analytical procedures to validate the proposed Multimodal Risk Reasoning Framework (MM-RRF). The design is structured to answer three core research questions (RQs), corresponding to the contributions claimed in this paper.

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4.1 Proposed Experimental Setup

A rigorous and fair evaluation requires detailed specifications across four key dimensions: dataset, baselines, metrics, and implementation. To this end, we elaborate on the proposed construction of a domain-specific dataset, the selection of representative baseline models, the definition of tiered evaluation metrics, and the technical implementation details of the framework.

4.1.1 Dataset Construction Plan

The validation of the MM-RRF framework necessitates a multimodal financial document dataset that mirrors real-world due diligence complexity. We propose the construction of the Financial Due Diligence Risk (FinDDRisk) dataset in collaboration with financial domain partners. The envisioned dataset would comprise several hundred anonymized due diligence projects, encapsulating multi-format documents such as financial statements (PDFs with complex tables), legal contracts (scanned images with seals and signatures), and corporate structure charts (JPG/PNG images). A core challenge this dataset aims to capture is that risk signals are often latent and scattered across these different modalities. Expert annotators would label key financial and legal entities, their relations, and final risk categories, providing the necessary ground truth for both perception and reasoning tasks.

4.1.2 Baseline Models for Comparison

To benchmark performance, the MM-RRF would be compared against three strong baselines, each representing a dominant paradigm critiqued in the literature review. These include: (1) a **BERT-BiLSTM-CRF Pipeline**, representing the text-only NLP paradigm that processes OCR-extracted text without visual context (Devlin et al., 2019); (2) **LayoutLMv3-**

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Large, representing the multimodal document understanding paradigm capable of jointly modeling text and layout information (Xu et al., 2020; Appalaraju et al., 2021); and (3) **GPT-4V (Few-Shot)**, representing the general-purpose multimodal Large Language Model (LLM) paradigm, showcasing powerful in-context learning but without tailored financial domain grounding (Brown et al., 2020).

4.1.3 Evaluation Metrics

Performance would be assessed at two interconnected levels to measure both perceptual accuracy and cognitive reasoning quality. At the perceptual level, Information Extraction (IE) Performance would be measured by the micro-averaged F1-score for fine-grained entity recognition and relation extraction. At the cognitive level, Risk Reasoning Performance would be primarily assessed by the Macro-averaged F1-score for final risk category classification. Additionally, operational risk metrics are considered critical for practical utility: Risk Detection Recall (the proportion of true risks identified) and False Positive Rate (the proportion of normal cases incorrectly flagged).

4.1.4 Implementation Specifications

The technical implementation of the framework follows the architectural specifications detailed in Section 3. The MLLM backbone would be fine-tuned using PyTorch, the Financial Risk Knowledge Graph would be instantiated using the Neo4j graph database, and all reasoning algorithms would be implemented in Python.

4.2 Anticipated Comparative Analysis

The comparative analysis is designed to validate the overall superiority of the integrated MM-RRF framework against established technical paradigms (RQ1). We hypothesize that MM-RRF would significantly outperform all baseline models. Specifically, while the LayoutLMv3 baseline is expected to excel in basic IE tasks, MM-RRF is designed to achieve a decisive advantage in the Risk Macro-F1 score, demonstrating the added value of knowledge-driven reasoning over pure perception. A key anticipated finding pertains to the operational metrics. The framework is engineered to achieve a high Risk Detection Recall while maintaining a low False Positive Rate. This balance contrasts with the projected performance of the GPT-4V baseline, which, despite its strong generative capabilities, may exhibit a higher FPR—a result that would highlight the limitation of unconstrained LLM reasoning in high-stakes, precision-critical domains.

4.3 Planned Ablation Studies

To deconstruct the contribution of each core component (RQ2), a series of ablation studies are planned, systematically degrading the full framework. The impact of removing each module would be analyzed to isolate its function. First, ablating multimodality to create a “Text-Only” variant would test the indispensability of visual and layout features; a significant projected drop in risk reasoning performance would validate that multimodal context is critical. Second, removing the Knowledge Graph (“w/o KG” variant) would isolate its role in reasoning; a sharp decline in Risk Macro-F1 with stable IE scores would confirm that the KG’s primary function is enabling higher-order cognitive reasoning, not perception (Ji et al., 2021). Third, disabling the Graph Reasoning Engine (“w/o Reasoner” variant) would assess the necessity of active inference; an expected performance drop would underscore that a static knowledge graph is insufficient for dynamic risk pattern mining. Collectively, these studies are designed to verify the synergistic roles of the three components.

4.4 Case Study for Explanatory Analysis (Planned)

A qualitative case study is planned to demonstrate the framework’s explainability and practical utility (RQ3). By tracing the framework’s end-to-end processing of a complex risk instance (e.g., a “Concealed Related-Party Transaction”), the analysis would illustrate how extracted information populates the knowledge graph, how a graph query reveals a hidden connection path, how a domain rule is triggered, and finally, how a coherent natural language explanation is generated. This planned analysis aims to showcase the framework's capacity for actionable explainability, linking its conclusions directly to source evidence and logical steps, thereby advancing the goal of transparent and auditable AI in finance (Cambria et al., 2023).

5. Discussion

This chapter interprets the deeper implications of the anticipated experimental outcomes, elucidating the theoretical and practical contributions of this research while candidly analyzing the proposed framework's inherent limitations to chart a clear path for future work.

5.1. Interpreting the Anticipated Outcomes

5.1.1 Bridging the Cognitive Gap: From Perception to Understanding

The planned experimental analysis is designed to validate a fundamental paradigm shift in automated financial document analysis, moving from surface-level perception to deep cognitive reasoning. Models confined to text or text-layout fusion, such as BERT-based pipelines or LayoutLMv3, are expected to exhibit a performance ceiling when tasked with inferring implicit, cross-document risks (Devlin et al., 2019; Xu et al., 2020). These systems excel at extracting "what is stated" but falter at deducing "what is implied." The MM-RRF framework is specifically architected to bridge this cognitive gap by integrating a dynamic Financial Risk Knowledge Graph and a symbolic reasoning engine, aiming to transform isolated document facts into a holistic understanding of financial risk.

5.1.2 A Blueprint for Neuro-Symbolic Integration

This integration embodies a concrete blueprint for Neuro-Symbolic AI, seeking to harmonize the strengths of data-driven perception with logic-driven inference. Within this architecture, the MLLM acts as a powerful, flexible "neural" perceiver, while the Knowledge Graph and its reasoner form a structured, transparent "symbolic" core for logical deduction

(Ji et al., 2021). The design of the ablation studies tests the hypothesis that both components are indispensable, aiming to demonstrate that combining sub-symbolic pattern recognition with symbolic reasoning offers a principled path to mitigate the “black box” problem and enhance the stability of AI decisions in critical domains.

5.1.3 Explainability as a Core Deliverable for Trust

Ultimately, the framework is engineered to deliver explainability as a core output, recognizing that in financial risk control, the auditability of a decision is as critical as its accuracy. The anticipated high false positive rate of generative, knowledge-unconstrained models like GPT-4V underscores a fundamental trust deficit in practice (Ribeiro et al., 2016). In contrast, MM-RRF is designed to generate an auditable reasoning trail—an evidence-based narrative that explicitly cites source documents, maps association paths within the knowledge graph, and references triggered logical rules. This built-in transparency is intended to drastically reduce expert validation overhead and is a non-negotiable prerequisite for deploying AI in regulated environments, aligning with the advanced objectives of Explainable AI research (Cambria et al., 2023).

5.2 Practical Implications and Projected Impact

The successful realization of this framework holds significant potential to transform key operational workflows within the financial industry. By automating the labor-intensive tasks of document reading and cross-referencing, the system is designed to free analysts to focus on higher-value judgment and strategic decision-making. Furthermore, its consistent, detail-oriented screening capability could uncover latent risk signals that might escape human attention, thereby potentially elevating the depth and comprehensiveness of due diligence

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processes. Beyond efficiency gains, the framework promises to strengthen institutional compliance and operational resilience through objective, rule-driven automation. Encoding regulatory mandates and internal policies directly into the knowledge graph's reasoning rules ensures that risk screening is performed with unwavering consistency, substantially reducing gaps arising from subjective human oversight or fatigue.

5.3 Limitations and Future Work

While addressing critical research gaps, the proposed framework also presents distinct design challenges that delineate fertile ground for future investigation. A primary limitation is its current dependence on manual knowledge engineering for constructing and updating the financial risk knowledge graph, which creates a scalability bottleneck and potential latency in responding to regulatory changes. Future work should, therefore, prioritize developing semi-automatic knowledge acquisition techniques, potentially leveraging the MLLM's own analytical capabilities to extract and formalize rules from evolving regulatory texts and case law, thereby enabling a more dynamic and self-evolving knowledge base.

Scalability challenges also extend to processing extreme document complexity and adapting to non-linear financial logic. The efficient processing of multi-hundred-page prospectuses and the handling of intricate, exception-filled financial scenarios remain demanding for current MLLM context windows and static rule engines. Advancing this research will likely require innovative hierarchical document processing strategies and the exploration of hybrid neuro-symbolic reasoning mechanisms, where the MLLM actively collaborates with the symbolic reasoner to dynamically interpret complex clauses and adjust inference pathways.

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Finally, the computational and deployment overhead associated with large MLLMs poses a practical barrier to widespread adoption, particularly for resource-constrained institutions. To ensure the framework's accessibility and environmental sustainability, future research must vigorously explore efficient fine-tuning paradigms like Low-Rank Adaptation (LoRA), model distillation techniques for creating leaner variants, and cost-optimized deployment architectures that balance performance with operational feasibility.

6. Conclusion

This research confronts the critical "cognitive gap" in automating financial due diligence by introducing the Multimodal Risk Reasoning Framework (MM-RRF), which integrates multimodal perception with structured knowledge reasoning. Through systematic design and projected analysis, this study arrives at three principal conclusions that affirm its contributions and chart a course for future intelligent financial systems.

First, this work validates a viable architectural pathway to transition from perceptual to cognitive intelligence in document analysis. The proposed MM-RRF framework demonstrates that the integration of a Multimodal Large Language Model (MLLM) for context-aware understanding, a dynamic Financial Risk Knowledge Graph for representation, and a symbolic reasoning engine for inference is not merely additive but synergistic. This architecture is specifically designed to overcome the inherent limitations of unimodal text analysis and pure perceptual models, directly addressing the challenge of synthesizing scattered, cross-document information into coherent risk insights. It provides a concrete technical blueprint for building AI systems capable of expert-like interpretation rather than mere information retrieval.

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Second, the framework exemplifies a practical neuro-symbolic paradigm that balances statistical power with explicability, a crucial requirement for high-stakes financial applications. By design, the MLLM component handles unstructured, heterogeneous data with flexibility, while the knowledge graph and rule-based reasoner enforce logical rigor and provide a transparent audit trail. The planned ablation studies are structured to confirm that both aspects are indispensable. This approach offers a principled solution to the "black box" problem, aiming to deliver not only accurate predictions but also actionable, evidence-based explanations—thereby building the essential trust required for operational deployment in regulated environments.

Third, the projected performance of MM-RRF on key operational metrics underscores its potential to transform due diligence from a manual, sampling-based process into a comprehensive, automated risk screening tool. The framework is engineered to achieve high risk detection recall while maintaining a low false positive rate, a combination critical for practical utility where missed risks are costly and false alarms erode efficiency. This capability, coupled with its inherent explainability, positions MM-RRF as a foundational technology for the next generation of Regulatory Technology (RegTech), with extensibility to compliance monitoring, fraud detection, and intelligent auditing.

In summary, this study moves beyond automating perception to pioneer a methodology for automating financial risk reasoning. While the proposed framework addresses significant gaps, its evolution toward full autonomy and scalability presents the next frontier. Future work must focus on developing self-adaptive mechanisms for knowledge acquisition, advancing hybrid reasoning models to tackle exceptional financial logic, and optimizing the framework for efficient, widespread adoption. By tackling these challenges, the pursuit of cognitive AI in finance can progress from a compelling vision to a transformative, operational reality.

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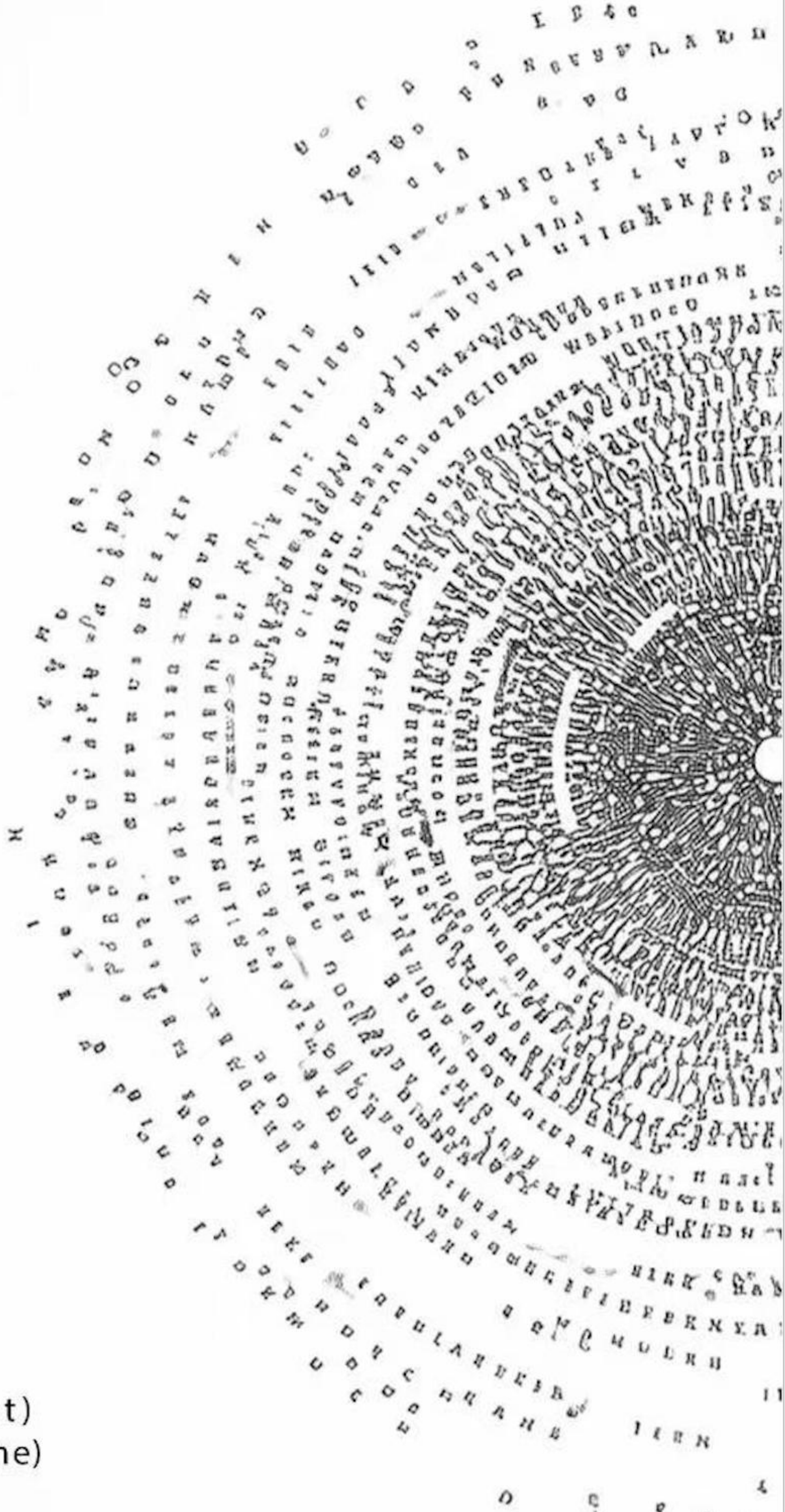

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