TERTIUM COMPARATIONIS IN CONTRASTIVE STUDIES: THEORETICAL INSIGHTS AND CURENT TRENDS

Karamysheva I. D.
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"*How do we know what to compare*?"
(Stig Johansson, 2007)[1]

INTRODUCTION

Comparison has always been pertaining to any kind of linguistic research. Linguists compare units undergoing research scrutiny, compare the new obtained data with the previously known ones, compare theoretical frameworks in order to find the most appropriate one to follow, but it is the Contrastive Linguistics that puts comparison and contrast into the heart of its research to find similarities and differences characteristic of the object under the contrastive analysis. The Contrastive Linguistics research field evolved simultaneously shaping the understanding of one of the key for this discipline notions – "*tertium comparationis*". Latin by origin, the term "*tertium comparationis*" continues to draw attention of researchers, becoming the object of much debate. As the outstanding representative of the Polish school of contrastive analysis Tomasz P. Krzeszowski claimed: "One of the reasons why contrastive studies continue to perform the role of the Cinderella of linguistics is the fact that its most fundamental concept *tertium comparationis* remains as hazy as ever".[2]

There is a suggestion that in modern scholarship the term *tertium comparationis* has two main uses: in rhetoric, it is the Latin equivalent of *ground* in the analysis of similes and metaphors; more often, it refers to what is shared between the objects of any comparison, for which *tertium comparationis* provides the necessary common ground. The second use, usually considered a derivative of the first, was introduced into language

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[1] Johansson, S. Seeing through Multilingual Corpora. On the Use of Corpora in Contrastive Studies. Studies in Corpus Linguistics. 26. Amsterdam: John Benjamins, 2007. P. xiii-xiv. DOI: https://doi.org/10.1075/scl.26

[2] Krzeszowski T. P. Contrasting Languages. The Scope of Contrastive Linguistics. Berlin, New York : Mouton de Gruyter, 1990. 290 p.

comparison, as Lei Zhu[3] claims, in the mid-twentieth century, mainly through the works of Ellis (1957[4], 1966[5]).

To understand the nature of "*tertium comparationis*" it is indispensable to consider correlated notions "similarity" and "equivalence", going deeper into such related terms as "formal correspondence" vs "semantic equivalence", differentiating "functional equivalence" as well "translation equivalence", and "pragmatic equivalence". Comparing these adjacent notions will give the possibility to identify the variety of contexts in which a researcher can come across the notion of "*tertium comparationis*".

The correct application and understanding of the nature of "*tertium comparationis*" is in the methodological basis of Contrastive Linguistics research (in fact, the suggested overview is the elaboration of the ideas, partially discussed in[6]). To judge the correctness of the application of this concept in modern Contrastive Linguistics (CL), one should look upon *tertium comparationis* within the periods of CL development.

Linguists, involved in the contrastive research, largely single out the following historical periods: **Traditional**, **Classical** and **Modern**[7] (see also[8]). Nevertheless, considering the present stage and the current trends, we should add one more period, – a **Digital** period, depicting corpus-based contrastive studies.

1. The notion of *"tertium comparationis"* within the periods of Contrastive Linguistics development

Traditional period (the end of 19th century until after World War II). Contrastive Linguistics, as it is accepted to believe from the comparative-historic perspective, started its formation as a language discipline on the basis of typology in the middle of the 20th century and has been intensively developing since 50-ies of the 20th century. Though, according to the claim

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[3] Lei Zhu. On the origin of the term tertium comparationis. *Language & History*, 2017. VOL.60. NO.1. P. 35–52. DOI: https://doi.org/10.1080/17597536.2017.1293373

[4] Ellis Jeffrey. On Comparative Descriptive Linguistics. In: Stephani Mladenov (Ed.), *Studia Linguistica in Honorem Acad Bulgarian Academy of Sciences*: Vladimir Georgiev, 1957. Sofia. P. 555–565.

[5] Ellis Jeffrey. Towards a General Comparative Linguistics. The Hague: Mouton, 1966. 170 p.

[6] Karamysheva I. *Tertium Comparationis* in Modern Contrastive Linguistics (Revising Approaches to Teaching). *Вісник Житомирського державного університету імені Івана Франка. Філологічні науки.* Випуск 1 (89). 2019. С. 11–18. DOI: https://doi.org/10.35433/philology.1(89).2019.11-18

[7] Андрейчук Н.І. Contrastive Linguistics = Контрастивна лінгвістика: навч. Посібник. Львів: ЛНУ імені Івана Франка, 2015. 343 с.

[8] María de los Ángeles Gómez-González and Susana M. Doval-Suárez. On contrastive linguistics. Trends, challenges and problems. *Dynamics of Language Use : Functional and contrastive perspectives*, edited by Christopher S. Butler, et al., John Benjamins Publishing Company, 2005. P. 19–45. DOI: https://doi.org/10.1075/pbns.140.05gom

of Thomash Krzeszowski[9], it holds probable that comparisons of languages for pedagogical purposes went to the very beginning of foreign language teaching, while systematic written records of such procedures date back to at least the 15th century. Nevertheless, we will stick to a more widely accepted point of view which outlines the traditional period of contrastive ideas development as the end of 19th century until after World War II. This period was enriched by the ideas of Benjamin Lee Whorf and the Prague Linguistic Circle. The founder of the Prague Linguistic Circle Vilém Mathesius recommends as a basis of comparative analysis mainly the study of the ways in which "common grammatical functions are expressed". His functional basis of contrastive research is of fundamental importance because it guarantees the highest possible degree of objectivity in dealing with language materials. Since the communicative needs can be regarded as roughly identical in the communities using the compared languages, one can treat them as a safe background against which the characteristic differences of the compared languages will distinctly stand out[10]. And the American linguist Benjamin Lee Worf, the coiner of the term "Contrastive Linguistics"[11], is usually not mentioned in the histories of CL. In his article "Language and Logic" (first published in 1941), B.L. Whorf used the term "Contrastive Linguistics" to denote a comparative study which puts emphasis on linguistic differences[12]. In the aforementioned article, Whorf distinguished between comparative and contrastive linguistics. He claimed that CL is "of even greater importance for the future technology of thought" and he defines it as a discipline which "plots the outstanding differences among tongues – in grammar, logic, and general analysis of experience"[13] (see as well[14]).

The **Classical period** of CL development (1945–1965) is marked by pedagogically oriented contrastive studies which began after the Second World War when the interest in teaching foreign languages increased in the USA. Crosslinguistic comparison became a vital source of information for

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[9] Krzeszowski T.P. Early contrastive studies in England, 15th–18th centuries. Gdańsk: Universytet Gdański, 1995. 226 p.

[10] Андрейчук Н.І. Contrastive Linguistics = Контрастивна лінгвістика: навч. посібник. Львів: ЛНУ імені Івана Франка, 2015. С. 48, 60.

[11] Kurteš Svetlana. New horizons for contrastive analysis: grammatical prototypes as tertium comparationis. In: *Selected Papers from the 18th ISTAL.* 2009. P. 233–241. DOI:10.26262/ISTAL.V18I0.5442

[12] Whorf B.L. Language and Logic. *Language, Thought and Reality. Selected writings of Benjamin Lee Whorf*; ed. and introd. by Carroll J.B., foreword by Chase S. Cambridge, Mass.: The MIT Press, 1956. P. 233–245.

[13] Whorf B.L. Language and Logic. *Language, Thought and Reality. Selected writings of Benjamin Lee Whorf*; ed. and introd. by Carroll J.B., foreword by Chase S. Cambridge, Mass.: The MIT Press, 1956. P. 233–245.

[14] Андрейчук Н.І. Contrastive Linguistics = Контрастивна лінгвістика: навч. посібник. Львів: ЛНУ імені Івана Франка, 2015. С. 53.

language teaching methodology and was granted huge funds (especially in the US), following the declaration by Charles C. Fries that: "the most efficient materials are those that are based upon a scientific description of the language to be learned, carefully compared with a parallel description of the native language of the learner"[15]. It is with the name of his pupil Robert Lado that the classical period of CL development is associated. In 1957 he published his book "Linguistics Across Cultures"[16]. The publication of Robert Lado's book was the start of modern applied contrastive linguistics as it is understood in American and European tradition. In later studies the term Contrastive Linguistics when referred to language acquisition changed to Contrastive Analysis (CA)[17]. The most simplistic version of CA was the belief that linguistic differences based on similarities and differences alone could be used to predict learning difficulties: where two languages were similar, positive transfer would occur; where they were different, negative transfer, or interference, would result[18].

Speaking about the classical period of CL development, one cannot but mention the outstanding Ukrainian scholar Yuriy Oleksiyovych Zhluktenko (1915–1990) who can be truly considered the forerunner of Contrastive Linguistics in Ukraine. Yu.O. Zhluktenko was the author of the first "Comparative Grammar of English and Ukrainian" (published in 1960), working practically in parallel with Robert Lado and mentioning his "Linguistics across Cultures" in the preface of his own edition[19]. Yu.O. Zhluktenko published a series of theoretical articles, outlining the CL research field: "Contrastive analysis as a method of language research"[20], "Contrastive linguistics: problems and perspectives (with the coauthor V.N. Bublyk)[21], "Notes on contrastive linguistics" (a collective research work under his editorship)[22]. In his works Zhluktenko outlined the difference

[15] Fries C.C. Teaching and learning English as a foreign language. Ann Arbor, MI: University of Michigan Press, 1945. P. 9.

[16] Lado R. Linguistics across Cultures. Applied Linguistics for Language Teachers. Ann Arbor: University of Michigan Press, 1957.141 p.

[17] Kramsch C. Re-reading Robert Lado, 1957, Linguistics across Cultures. Applied linguistics for language teachers. *International Journal of Applied Linguistics*. Vol. 17 No. 2 2007. P. 241–247. DOI: https://doi.org/10.1111/j.1473-4192.2007.00149.

[18] Karamysheva I. *Tertium Comparationis* in Modern Contrastive Linguistics (Revising Approaches to Teaching). *Вісник Житомирського державного університету імені Івана Франка. Філологічні науки.* Випуск 1 (89). 2019. С. 11–18. DOI: https://doi.org/10.35433/philology.1(89).2019.11-18

[19] Жлуктенко Ю.О. Порівняльна граматика англійської та укра-їнської мов: посібник. К.: Радянська школа, 1960. 160 с.

[20] Жлуктенко Ю.О. Контрастивний аналіз як прийом мовного дослідження. *Нариси з контрастивної лінгвістики.* К.: Наукова думка. 1979. С. 5–11.

[21] Жлуктенко Ю.О., Бублик В.Н. Контрастивна лінгвістика: Проблеми і перспективи. *Мовознавство*. 1976. № 4. С. 3–15.

[22] Нариси з контрастивної лінгвістики. К.: Наукова думка. 1979. 194 с.

between CL and such adjacent disciplines as: typology, historical linguistics, areal linguistics, theory of translation; he paid attention to the practical application of CL in Language teaching. He input much effort into elaborating such theoretical aspects of CL as: defining the terms "contrastive linguistics" and "contrastive analysis"; equivalence and comparability as well as *tertium comparationis* in CA. In his seminal article "Contrastive linguistics: problems and perspectives (co-autherd by V.N. Bublyk) Yu.O. Zhluktenko tried suggesting a linguistic model that could be used as a basis for contrastive research: "Of interest can be an attempt to apply the model of the sector analysis in contrastive research, based on the assumption that a sentence of any model type is in fact a complex unity of constructions or sectors. … Nevertheless, there are doubts concerning the application of the sector analysis since the sentence structure does not have a universal character. The researcher is constantly facing the challenge to impose on one language certain structural features of another"[23]. He criticized the attempts of CA based on the generative-transformational model elaborated by Noam Chomsky. He actually spoke about the ideas of formal and sematic equivalence in CA long before these ideas started to be widely discussed in a modern period of CL development.

Going over to the **Modern period**, it is worth reminding that (1970s – 1990s) were regarded as the years of CL "marginal status" (see Salkie et al.[24] and Andreichuk[25]). Nevertheless, this period is marked by seminal works in CL of two key figures, namely Tomasz P. Krzeszowski and Andrew Chesterman, and that was the period when the notion "*tertium comparationis*" became the center of many debates.

The prominent figure in modern contrastive studies Tomasz P. Krzeszowski stated in his seminal work "Tertium Comparationis" (also TC) that the existing CAs implicitly involve various platforms of interlinguistic reference, determined by specific linguistic models which they employ and specific levels of analysis which they embrace. Thus, different TCs are used for comparisons in lexicology, in phonology and in syntax. With the exception of the omnipresent initial assumption concerning the semantic identity or at least similarity of the compared phenomena, in few of these studies explicit mention of any TC is made, leave alone any attempts at justifying a particular choice. In the existing literature two types of TC have been employed and discussed: formal correspondence and semantic equivalence. Nevertheless, the scholar believes that looking for possible

[23] Жлуктенко Ю.О., Бублик В.Н. Контрастивна лінгвістика: Проблеми і перспективи. Мовознавство. 1976. № 4. С. 7.

[24] Salkie, R., Aijmer, K. and Barlow, M. 1998. Editorial. Languages in Contrast 1:1, v-xii.

[25] Андрейчук Н.І. Contrastive Linguistics = Контрастивна лінгвістика: навч. посібник. Львів: ЛНУ імені Івана Франка, 2015. С. 105.

tertia comparationis one should not limit oneself to only these two largely discussed in theory types. Formal similarity alone cannot serve as a *tertium comparationis* without being supported by semantic equivalence. Therefore, it is generally recognized that a contrastive analysis based on purely formal criteria falls short of both theoretical and practical expectations[26]. Krzeszowski further argues that somewhat less obviously a contrastive analysis based on semantic similarity alone can also be inadequate and misleading. In the contrastive practice semantic equivalence is often erroneously identified with translation equivalence. One can easily show that translation equivalents are often semantically non-equivalent. It appears that semantic equivalence must be constrained *formally,* while translation equivalence does not have to be so constrained. According to the scholar, when one translates one departs from semantic equivalence due to three types of reasons: 1. errors in translation (which will be disregarded here); 2. formal properties of respective languages; 3. what is generally loosely termed "stylistic" reasons. These three types of reasons lead to situations in which actual translation practice, with the exception of legal texts, seldom involves translations which are semantically equivalent. In reality, many authors have shown that semantic equivalence is not a necessary prerequisite of a good translation. What is expected of a correct translation is pragmatic or functional equivalence. It cannot be denied that pragmatic equivalence can serve as TC for contrastive analyses of such matters as the structure of discourse, stylistic properties and quantitative aspects of texts. But syntactic CAs, the primary concern of earlier CAs, must be conducted within the limits of the semantic component of the language, or more specifically that part of the semantic component which can be systematically and predictably correlated with the grammatical structure of sentences[27].

Tomasz P. Krzeszowski is also known for introducing two more notions into the CA procedure, namely: semanto-syntactic equivalence and circularity[28].

The circularity, according to Krzeszowski, consists in the following: we compare in order to see what is similar and what is different in the compared materials; we can only compare items which are in some respect similar, but we cannot use similarity as an independent criterion for deciding how to match items for comparison, since similarity (or difference) is to result from the comparison and not to motivate it.

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[26] Tomasz P. Krzeszowski. Tertium Comparationis. In: *Contrastive linguistics: Prospects and problems*. Fisiak, J. (Ed.). De Gruyter, Inc., 1984. P. 302. DOI: https://doi.org/10.1515/9783110824025.301

[27] Ibid. P. 301–303.

[28] Ibid. P. 305–307.

To avoid this undesirable circularity, in deciding about formal correspondences one needs a common TC outside the formal properties. The underlying meaning of the closest approximations to acceptable word-for-word translations provides such a TC. Sentences and constructions sharing identical semantic representations at the level of sentence semantics (but necssarily exhibiting certain idiosyncratic differences due to the differences at the level of word-semantics) are in the relation of semanto-syntactic equivalence and constitute a constrained set of data for syntactic CAs.

Tomasz P. Krzeszowski[29] further argues that in CAs constrained by semanto-syntactic equivalence it is possible to compare: a) constructions; b) systems and c) rules. Of these three types only CAs of constructions are directly based on semanto-syntactic equivalence, constraining 2-texts for the purposes of such CAs. The comparison of systems requires dependence on syntagmatic considerations in the same way in which any paradigmatic analysis is linked to syntagmatic considerations. For example, isolating a particular system in a particular language requires an examination of syntagmatic arrangements of elements, i.e. constructions in which those elements appear. In CAs, likewise, no equivalence of systems can be ascertained without assessing the equivalence of constructions in which elements of those systems appear. Investigators usually compare equivalent systems across languages, basing on intuitions their decisions to juxtapose the relevant words, thus employing the concept of system equivalence as TC. It takes little reflection to realize that system equivalence can be made explicit only through the examination of constructions in which elements of the compared systems appear, i.e. via the notion of semanto-syntactic equivalence relating the relevant 2-texts as primary data.

Tomasz P. Krzeszowski summarizes his ideas in the following way[30]:

- Traditionally recognized formal, semantic and translational correspondences do not provide necessary TCs for the various types of CAs, as more subtle distinctions are required.

- Systematic CAs alone cannot yield practically useful results but must be amplified by quantitative CAs which investigate relative frequencies of equivalent phenomena.

- It must be stressed that quantitative CAs are impossible without systematic CAs as the latter establish common categories at all levels of linguistic analysis as parameters along which quantitative measurements can be made.

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[29] Tomasz P. Krzeszowski. Tertium Comparationis. In: *Contrastive linguistics: Prospects and problems*. Fisiak, J. (Ed.). De Gruyter, Inc., 1984. P. 307. DOI: https://doi.org/10.1515/9783110824025.301

[30] Ibid. P. 310.

- Therefore, neither qualitative nor quantitative CAs alone are adequate both theoretically and practically.

Another prominent European representative of contrastive studies is an English scholar, based in Finland, Andrew Chesterman. He views the notion of "*terium comparationis*" via the concept of "similarity". According to A. Chesterman, "similarity" must accordingly be constrained in some way, particularly if we are to pinpoint the essence of the concept as it is expressed in everyday language, in the true Wittgensteinian spirit. One way of introducing such a constraint is via the prototype theory: features are conceived of as being present or absent to a certain degree, not absolutely, and similarities are assessed in terms of relative closeness to a prototype. The prototype thus serves as a *tertium comparationis*. In other words, the relation of the assessed entities to the prototype takes precedence over other possible dimensions of assessment.[31]

Andrew Chesterman presents his ideas concerning the "similarity" concept as the following building-blocks:

(a) The concept of similarity is Janus-faced. It simultaneously refers to a relation-in-the-world and a perception-in-the-mind. The element of subjective perception is always present in any judgement of similarity.

(b) Two entities are perceived to be similar to the extent that their salient features match.

(c) Two entities count as the same within a given frame of reference if neither is perceived to have salient features which the other lacks.

(d) Assessments about what counts as a feature and how salient a feature is are both context-bound (where context includes the purpose of the assessment) and assessor-bound.

(e) Assessments of similarity are thus constrained by relevance.

(f) Degree of similarity correlates inversely with the extension of the set of items judged to be similar.

(g) Two main types of similarity relation can be distinguished: divergent and convergent.

The scholar believes that similarity has traditionally entered Translation Theory and Contrastive Analysis under the rubric of "equivalence", a term which has been given a wide variety of interpretations in these two fields[32].

The concept of equivalence in CA is necessarily linked to that of the *tertium comparationis*. It has been a commonplace to point out that no comparison can be made between any two entities without a frame of reference provided by a third term of some kind, and that decisions about equivalence are ipso facto decisions about the *tertium comparationis*. It is

[31] Chesterman A. Contrastive functional analysis. Amsterdam/Philadelphia : John Benjamin's Publishing Company, 1998. P. 8. DOI: https://doi.org/10.1075/pbns.47
[32] Ibid. P. 16.

also a commonplace to observe that different kinds of analysis require different kinds of the third term: this is most obviously the case with respect to the different focuses of phonological studies, lexical studies and syntactic studies[33].

Andrew Chesterman agrees with Tomasz P. Krzeszowski that the contrastivist appears to run the risk of circularity, in that the result of the comparison may be thought to be no more than the initial assumption itself. But he criticizes his idea about the semanto-syntactic equivalence, which may hold between constructions. This is the type on which Krzeszowski bases his own theory of Contrastive Generative Grammar[34], though believing it to be, without doubt, the most ambitious contribution to the theoretical CA. Chesterman believes that problems occur in the distinction between semanto-syntactic equivalence and translation equivalence. According to Krzeszowski, the ability to recognize [semanto-syntactic] equivalents is a part of a bilingual person's competence. This view thus predicates such equivalence on intuition. But suppose bilinguals differ in opinion?, as Chesterman further argues. The degree of overall closeness of a pair of sentences is a matter of weighing the various formal components against each other, in other words it is precisely a matter of judgement. But a sentence in language A may not necessarily have a semanto-syntactic equivalent in language B: there may be semanto-syntactic gaps. Semanto-syntactic equivalence is thus rather heavily constrained[35].

Agreeing and disagreeing on some issues, these two scholars are still widely cited in modern research publications dealing with CA.

Ukrainian linguist Nadiya Andreichuk, taking into account different viewpoints on *tertium comparationis*, developed within the CL history, believes that comparability criterion is one of the key concepts and has to be established prior to any analysis[36]. The analyst is supposed to answer questions *what lingual objects can be compared in the observed languages* and *what the aspects of comparison are*. Consequently, Nadiya Andreichuk suggests three approaches to theoretical contrastive studies:

1) Small systems of lingual features of a lingual object are contrasted.

2) Semantic, associative, syntactic, word-formation, rhetoric and other fields are compared.

[33] Chesterman A. Contrastive functional analysis. Amsterdam/Philadelphia : John Benjamin's Publishing Company, 1998. P. 29. DOI: https://doi.org/10.1075/pbns.47

[34] Krzeszowski T. P. Contrastive generative grammar: theoretical foundations, 1974. (Lodz : Uniwersytet Lodzki, reprinted in 1979, Tübingen: Gunther Narr Verlag). 220 p.

[35] Chesterman A. Contrastive functional analysis. Amsterdam/Philadelphia : John Benjamin's Publishing Company, 1998. P. 30-34. DOI: https://doi.org/10.1075/pbns.47

[36] Андрейчук Н.І. Contrastive Linguistics = Контрастивна лінгвістика : навч. посібник. Львів : ЛНУ імені Івана Франка, 2015. С. 196, 198.

3) Preferences in choosing different aspects underlying processes of creating lingual objects.

Within these approaches different *tertia comparationis* can be applied (Fig. 1):
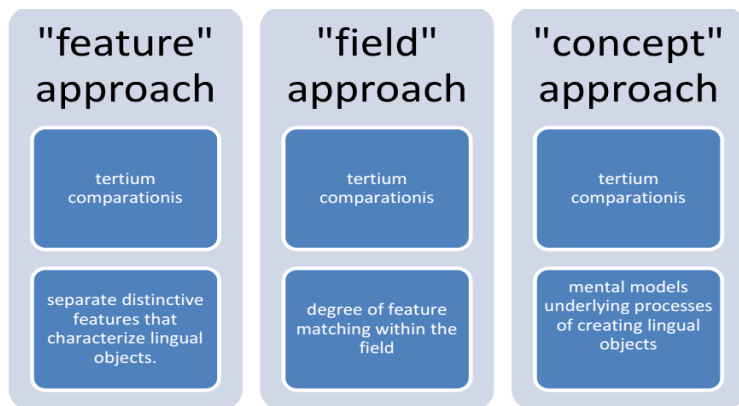
Fig. 1. *Tertia comparationis* applied within three main approaches in contrastive studies (by Nadiya Andreichuk)

The presented approach towards classifying different types of *tertia comparationis* has proved to be effective. Thus, in the textbook "Contrastive Grammar of English and Ukrainian Languages" (3rd revised edition, Lviv, 2017)[37] the scope of features, comprising the notion of "a part of speech", are used a basis or platform for providing contrastive grammatical analysis of parts of speech in both mentioned languages. This can be regarded as a "feature approach" in the *tertium comparationis* application (consider the example description in the correlated article)[38].

Summarizing the views regarding the correlation between the notions of "*tertium comparationis*" and "equivalence", "tertium comparationis" and "comparability", Nadiya Andreichuk further argues that, traditionally, there are three main ways of dealing with the problem of comparability. Originally, it used to be established either at the semantic or formal/grammatical level. The third way of establishing comparability criterion assumes defining the

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[37] Karamysheva I.D. Contrastive Grammar of English and Ukrainian Languages: Textbook; Third edition, revised. Vinnytsia: Nova Knyha Publishers, 2017. 336 p.

[38] Karamysheva I. Tertium Comparationis in Modern Contrastive Linguistics (Revising Approaches to Teaching). *Вісник Житомирського державного університету імені Івана Франка. Філологічні науки.* Випуск 1 (89). 2019. С. 11–18. DOI: https://doi.org/10.35433/philology.1(89).2019.11-18

relations of equivalence, similarity and difference in the observed languages. The notion of equivalence was originally taken from the theory of translation and it involved the concept of translation equivalence. More specifically, equivalence in contrastive studies assumes that there is a universal feature, an overall platform of reference, *tertium comparationis*, which enables the comparison to be performed[39]. According to Nadiya Andreichuk, the actual realization of that universal feature in the two languages is what the contrastivist is interested in. Therefore, *tertium comparationis* is a background of samness and the *sine qua non* (an essential or indispensable element, condition or ingredient) for any justifiable systematic study of contrasts, which enables the comparison to be performed.

2. Digital period (corpus-based contrastive studies from the end of 1990s up till now)

In the early 1990s multilingual corpora entered the scene, representing a new development in corpus linguistics, which had been predominantly monolingual until then, as well as in contrastive studies, which got a more solid empirical basis, new methods and a general boost. After "many years of marginal status"[40] the interest in contrastive analysis had been revived substantially by the late 1990s: there were a number of projects and meetings concerned with the comparison of languages, and a designated journal, Languages in Contrast, saw the light of day.[41] This revival has been attributed to the advent of multilingual corpora (see more in Altenberg & Granger[42], as well as König[43]). The renewed interest in (corpus-based) contrastive analysis was described by Stig Johansson as "contrastive linguistics in a new key"[44], which used to be considered an applied discipline of linguistics, closely associated with language teaching (consider also[45]). It has to be mentioned that Stig Johanson, a prominent a Swedish-Norwegian

[39] Андрейчук Н.І. Contrastive Linguistics = Контрастивна лінгвістика : навч. посібник. Львів: ЛНУ імені Івана Франка, 2015. С. 196–197.

[40] Salkie R., Aijmer K. and Barlow M. Editorial. Languages in Contrast 1:1. 1998. v-xii.

[41] Hasselgård Hilde. Corpus-based contrastive studies: Beginnings, developments and directions. In: *Languages in Contrast: International Journal for Contrastive Linguistics*. 2020, 20 (2), P.184-185. DOI: https://doi.org/10.1075/lic.00015.has

[42] Altenberg B. and Granger S.. Recent trends in cross-linguistic lexical studies. In: *Lexis in Contrast: Corpus-based approaches*, B. Altenberg and S. Granger (eds). Amsterdam: Benjamins, 2002. P. 3–48. DOI: 10.1075/scl.7.04alt

[43] König E. Contrastive linguistics and language comparison. In: *Languages in Contrast* 12:1. 2012. P. 3-26. DOI: https://doi.org/10.1075/lic.12.1.02kon

[44] Johansson, S. Seeing through Multilingual Corpora. On the Use of Corpora in Contrastive Studies. Studies in Corpus Linguistics. 26. Amsterdam: John Benjamins, 2007. P. xiii-xiv. DOI: https://doi.org/10.1075/scl.26

[45] Ebeling J. Contrastive linguistics in a new key. In: *Languages in Contrast 20 Years on. Special issue of Nordic Journal of English Studies*.15(3). 2016. P. 7–14. DOI:10.35360/ NJES.373

linguist, was instrumental in compiling corpora and thereby developing the field of corpus linguistics as well as corpus-based contrastive linguistics. Most prominent among the corpora he compiled are the Lancaster-Oslo-Bergen corpus, in collaboration with Geoffrey Leech, and the English-Norwegian Parallel Corpus (ENPC), which contributed vitally to establishing the field of corpus-based contrastive linguistics.

The use of multilingual corpora takes "the descriptive comparison of languages from the level of the decontextualized system of choices to language in use"[46], resembling the ideas of Stig Johansson[47]. Corpus-based contrastive analysis is situated somewhere between monolingual analysis and comparative/typological studies by focusing on the comparison of a small number of languages and by tending to emphasize differences between them rather than similarities[48].

Corpus-based contrastive analysis, like other branches of corpus linguistics, uses large and principled digital collections of natural texts (corpora) and depends on both quantitative and qualitative analytical techniques. At present, corpus-based contrastive linguistics is a well-established field of research which can be distinguished from the neighbouring fields of learner corpus studies, translation studies, and typological studies[49].

The introduction of multilingual corpora for CA required new methods for exploiting them. The development of such methods did not start from scratch but borrowed from e.g. monolingual corpus linguistics, traditional contrastive analysis and descriptive (text-based) translation studies. The choice of method for a particular study clearly depends on the type of corpus that is used. Crucially, only parallel (translation) corpora allow parallel concordancing (following alignment), while the use of comparable corpora typically requires a decision on which linguistic items to compare prior to the corpus investigation[50].

For a multilingual corpus, or corpora in different languages, to be suitable for contrastive analysis, the texts must be related to each other in some way, either through translation or through text comparability. It is exactly a parallel (translation) corpus that contains "the same text samples in

[46] Mair C. Contrastive analysis in linguistics. In: *Oxford Bibliographies in Linguistics*, M. Aronoff (ed.), Oxford/New York : Oxford University Press, 2018. P. 10. DOI: 10.1093/OBO/9780199772810-0214

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[48] Salkie R., Aijmer K. and Barlow M. Editorial. Languages in Contrast 1:1. 1998. v-xii.

[49] Hasselgård Hilde. Corpus-based contrastive studies: Beginnings, developments and directions. In: *Languages in Contrast: International Journal for Contrastive Linguistics*. 2020, 20 (2). P. 184. DOI: https://doi.org/10.1075/lic.00015.has.

[50] Ibid. P. 189.

each of two languages, in the sense that the samples are translations of one another" (Oakes & McEnery 2000: 1)[51].

The use of parallel corpus for carrying out CA brought attention to the proper application of *tertium comparationis* in the corpus-based contrastive studies. The core of the problem was that in such cases it was translation equivalence that served as a TC. There were expressed concerns that comparable corpora, especially parallel corpora, have the drawback of lacking an obvious *tertium comparationis* (a background of sameness against which differences can be viewed and described)[52].

Michael Barlow, focusing on the study of parallel texts in corpus-based contrastive analysis, believes that the correspondence between the linked expressions in the corpus is not exactly the same as translation equivalence. The translator is translating texts, not words or constructions, and is aiming for the best overall translation of one text into the other. The translator is not aiming for simple equivalence in terms of lexis because, for example, choosing an appropriate sentence structure in the translated text may affect the lexis used. Each translator must consider all the factors associated with any individual translation and decide on the best overall result. Translations need to be used with care since they tend to be affected by various 'translation effects', i.e. influences from the source language or from general translation strategies[53].

Hilde Hasselgård, a keynote speaker at the latest 10th International Contrastive Linguistics Conference that took place in July 2023, claims that the danger of translation bias in corpus-based contrastive studies can be counteracted. The bidirectional corpus model is particularly well suited for contrastive studies because the translation relation can provide *tertium comparationis* for the cross-linguistic comparison (i.e., a background of sameness against which differences can be viewed and described)[54]. Signe Oksefjell Ebeling and Jarle Ebeling, discussing the pros and cons of corpus types for CA, conclude as well that a bidirectional parallel corpus, relying on both comparable monolingual and bidirectional translation data, may yield

[51] Oakes M. & McEnery T. Bilingual text alignment – an overview. In: *Multilingual Corpora in Teaching and Research*, S.P. Botley, A.M. McEnery and A. Wilson (eds) Amsterdam: Rodopi, 2000. P. 1. DOI: https://doi.org/10.1163/9789004485204_002

[52] Aijmer K. and Altenberg B. (eds). Advances in Corpus-based Contrastive Linguistics. In: *Studies in Honour of Stig Johansson*. Amsterdam: Benjamins, 2013. P. 301–306. DOI:10.1007/978-3-319-17948-3_14

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[54] Hasselgård Hilde and Ebeling Signe Oksefjell. At the interface between Contrastive Analysis and Learner Corpus Research: A parallel contrastive approach. In: *Nordic Journal of English Studies*. 17(2). 2018. P. 182–214. DOI: 10.35360/njes.438.

more robust insights into cross-linguistic matters than either of the two on their own[55].

Hilde Hasselgård presents a scheme to exemplify the place of bidirectional corpora within multilingual corpora[56].
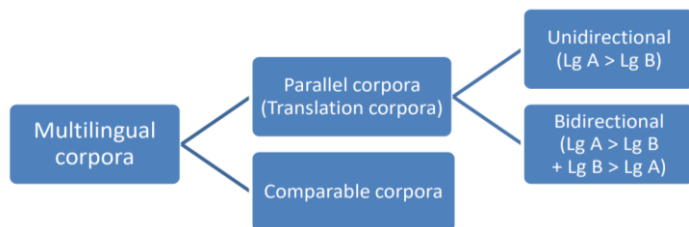
Fig. 2. Types of multilingual corpora for contrastive analysis (according to Hilde Hasselgård)

In order to depict the recent developments in corpus-based contrastive studies Hilde Hasselgård has done a survey of articles, published in *Languages in Contrast* (from 1998 to 2018). Her survey presents the following results[57]:

- the proportion of corpus-based papers has always been high, but it has increased in recent years;

- discourse, lexis and syntax are the three most common areas of corpus-based contrastive analysis;

- since the 1990s the field of corpus-based contrastive linguistics has grown and diversified to include comparisons of more languages and language pairs;

- the number of languages compared has increased in two ways: more language pairs are being investigated across studies, and individual studies may include more than two languages while retaining the detailed, close perspective of CA.

The scholar concludes that linguists in the business of contrastive corpus-based studies thus need to be conscious of the content of the corpora (e.g. consistency vs idiosyncrasies across texts), the distinctions between source and target texts in the case of parallel corpora, and the degree of text comparability in the case of comparable corpora so that the contrastive

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[55] Ebeling Signe Oksefjell & Ebeling Jarle. Contrastive Analysis, Tertium Comparationis and Corpora. In: *Nordic Journal of English Studies* (NJES). 19. 2020. P. 97–117. doi: 10.35360/njes.514.

[56] Hasselgård Hilde. Corpus-based contrastive studies: Beginnings, developments and directions. In: *Languages in Contrast: International Journal for Contrastive Linguistics*. 2020, 20 (2). P. 189. DOI: https://doi.org/10.1075/lic.00015.has

[57] Ibid. P. 184–208.

analysis will produce sound and reliable results. One more important conclusion is that given the growing reliance on comparable corpora, the challenge of identifying a reliable *tertium comparationis* should not be forgotten, i.e. the establishment of a background of sameness in the absence of a translation relation.

To gain more insight in present-day contrastive studies it is worth paying attention to the 10th International Contrastive Linguistics Conference (ICLC-10) which took place in Mannheim, Germany, from 18 to 21 July 2023[58]. The aim of the conference, running its 10th anniversary, was to encourage fine-grained cross-linguistic research comprising two or more languages from a broad range of theoretical and methodological perspectives. The contributions were addressing a range of theoretical, methodological and empirical issues, such as:

• the status of contrastive research within linguistic studies and its relationship with neighbouring or complementary approaches such as historical, typological, micro-variationist, intercultural and contact linguistics;

• the link between contrastive studies and fields of applied linguistics such as foreign language teaching and learning, translation studies and corpus linguistics;

• potentials and limits of theoretical frameworks in relation to contrastive analysis (e.g., functional, cognitive, interactional, generative, constructional approaches);

• theoretical and theoretical-methodological issues (comparability, incommensurability, the socio-cultural context, tertia comparationis, language universals);

• empirical and data-related methodological issues (parallel / translation corpora, comparable corpora, learner corpora, multimodal corpora, naturalistic data of face-to-face interaction, psycho- and neurolinguistic experiments, surveys).

The listed issues bring to attention the fact that results obtained within the CL field are of value to adjacent disciplines, including typology, translation studies, applied linguistics. There continue debates trying to answer a question: "Is Contrastive Linguistics possible without a theoretical framework?". Such theoretical-methodological issues as choosing a comparability criterion and *tertia comparationis* still remain in primary focus of researchers' attention. Extensive data provided by corpora are an indispensable source of the quantitative backup of quality analysis data, bringing in the new trend of the usage-based approach to the study of language data under the contrastive analysis.

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[58] 10th International Contrastive Linguistics Conference. Book of Abstracts (pre-conference version) (ids-mannheim.de) (access date: 22.02.2024)

CONCLUSIONS

The notion "*tertium comparationis*", dating from antique times, does not disappear from the focus of linguists, dealing with challenges of cross-linguistic variation, language lacunas, comparison and contrasting of units at different language levels, as well as speech acts within a range of discourse types and across registers. Nevertheless, this notion remains one of the key theoretical-methodological issues in modern Contrastive Linguistics.

To dispel the haziness of the concept *tertium comparationis*, truly pointed out by Thomash P. Krzeszowski in his seminal article, it is worth looking at the periods of Contrastive Linguistics development. Considering the history of contrastive studies and Contrastive Linguistics coming onto the stage as a separate discipline, there can be distinguished the following periods:

I. Traditional period (the end of 19th century until after WW II)

II. Classical period of CL development (1945 – 1975)

III. Modern period. The years of CL "marginal status" (1970s – 1990s)

IV. Digital period (corpus-based contrastive studies from the end of 1990s up till present days).

The term "*tertium comparations*" itself cannot be traced within the Traditional period. Though, it should be mentioned that linguists, dealing with languages' comparison at that time, propagated the functional basis for contrastive research which is of fundamental importance because it guarantees the highest possible degree of objectivity in dealing with language materials. They also warned about the importance of identifying a safe background against which the characteristic differences of the compared languages will distinctly stand out.

The Classical period of CL development was largely associated with pedagogically oriented contrastive studies which began after the Second World War with the surge of interest to teaching foreign languages and elaboration of the second language acquisition methodology. Apart from that, it was an active period of Contrastive linguistics shaping itself as a separate linguistic enterprise. There was outlined the difference between CL and such adjacent disciplines as: typology, historical linguistics, areal linguistics, theory of translation; attention was paid to the practical application of CL in Language teaching. There were elaborated theoretical aspects of CL. The terms "contrastive linguistics" and "contrastive analysis" were defined. The debate about the nature of equivalence and comparability as well as tertium *comparationis* in CA was initiated.

The Modern period, witnessing somehow a marginal status of CL, is nevertheless marked by the appearance of seminal works. Those were devoted to clarifying the understanding of *tertium comparationis* within CA procedure with the aim to point out to its correct choice and application. It was recognized that formal correspondence, semantic equivalence and

translational correspondences do not provide necessary TCs for the various types of CA. Moreover, systematic CAs alone cannot yield practically useful results but must be amplified by quantitative CAs which investigate relative frequencies of equivalent phenomena. There came an awareness that it is expedient to talk about the use of large collection of data in the form of corpora for the purposes of CA.

The present Digital period started from the end of 90s of the XXth century, bringing about a new quality to CA with multilingual corpora coming onto the stage. Corpus-based contrastive studies were termed as "a contrastive linguistics in a new key". Here it is worth mentioning the statement made by Hilde Hasselgård that the increasing amount of global media, migration and international travel, the need for insights into cross-linguistic matters is unlikely to diminish. Multilingual corpora will continue to be an invaluable source of cross-linguistic and cross-cultural information. The new period in CL brought attention to the proper application of *tertium comparationis* in corpus-based contrastive research. It became clear that parallel corpora provided, first of all, translation equivalence and that comparable corpora have the drawback of lacking an obvious *tertium comparationis.* Nevertheless, it has been proved by experts in corpus-based CA that the bidirectional corpus model can provide *tertium comparationis* for the cross-linguistic comparison.

Answering a question "How do we know what to compare?" put by Stig Johansson, a prominent figure in corpus-based contrastive studies, one cannot but mention the idea expressed by Nadiya Andreichuk that the comparability criterion is one of the key concepts and has to be established prior to any analysis. The analyst is supposed to answer questions what lingual objects can be compared in the observed languages and what the aspects of comparison are. The researcher should choose an overall platform of reference, *tertium comparationis*, which enables the comparison to be performed. Depending on the platform of reference (or *tertium comparationis*), which we adopt, the same objects turn out to be either similar or different. Various kinds of contrastive studies can be distinguished, depending on the *tertium comparationis* adopted and the kind of equivalence involved, though it is worth speaking of *tertia comparationis* applied within three main approaches in contrastive studies: "feature approach", "field approach", and "concept approach". These approaches reflect the theoretical insights into understanding of this notion, which is a key one in the theoretical-methodological framework of modern Contrastive Linguistics.

SUMMARY

The presented overview focuses on the theoretical insights into understanding one of the key concepts of Contrastive Linguistics – *tertium comparationis*. On different stages of Contrastive Linguistics development there can be witnessed debates about the proper definition of *tertium*

comparationis. Therefore, it is expedient to distinguish the following periods of Contrastive Linguistics development, which brought in new senses in defining *tertium comparationis*: Traditional, Classical, Modern and the uptodate Digital period. The nature of "*tertium comparationis*" is considered through the prism of correlated notions "similarity" and "equivalence", with special attention to such terms as "formal correspondence" vs "semantic equivalence", as well as "translation equivalence". It is concluded that looking for possible *tertia comparationis* one should not limit oneself to only two largely discussed theoretically types: formal correspondence and semantic equivalence. The attention is brought to the comparability criterion which has to be established prior to contrastive analysis. Special focus is put on a Digital period, presenting corpus-based contrastive studies, shaping new tendencies in understanding and application of *tertium comparationis.*

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Information about the author:
Karamysheva Iryna Damirivna,
Candidate of Philological Sciences, Associate Professor,
Associate Professor at the Applied Linguistics Department
Lviv Polytechnic National University
12, Bandery str., Lviv, 79013, Ukraine