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# Discourse analysis as theory, method, and epistemology in studies of education policy

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## ABSTRACT

*Discourse* has featured in studies of educational policy as an analytic and methodological tool, theoretical frame, realm of implication, and even a foundational definition of educational policy itself (e.g.) Despite the centrality of discourse as a frame for exploring educational policy and its implications, the ways that discourse is defined or operationalized in educational policy research are often left implicit which can lead to murky relations to larger onto-epistemological questions of how we construct findings from data as well as the nature of policy. In this interpretive analysis, we synthesize a corpus of 37 peer-reviewed journal articles that bring together educational policy and analyses of discourse from varying theoretical and methodological perspectives in order to better understand the breadth and scope of how discourse is defined and operationalized in studies of educational policy, including in ways that are sometimes incommensurate with authors' stated theoretical and methodological positions. After first laying the theoretical groundwork for analyses of discourse in the field of educational policy, we then illustrate how discourse analysis is used differently, and sometimes inconsistently, within contested paradigmatic landscapes. We conclude with an argument for discussions across theoretical frameworks and methodological paradigms about how the concept of discourse lends itself to different epistemological vantage points on educational policy.

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## KEYWORDS

Discourse; paradigm; post-structuralism; critical discourse analysis; methodology

## Introduction

Education policy is a broad and multi-faceted field that has evolved over a relatively short period of time to reflect the changing role of policy and its analysis in contemporary society. In the 1950s, policy analysis emerged from the state's supposed need for policy recommendations, as policy was seen as the mechanism for fixing social problems or ensuring the welfare of the state and its citizens (Rizvi and Lingard 2009). Policy analysts then served a technical need that required technical methods and solutions. Over time, however, the education policy landscape has shifted from local and country-specific considerations to more global ones (Ball 2012; Spring 2015), with

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calls for new ways to think about and analyze policy that take into account global networks and influences (e.g. Rizvi and Lingard 2009).

While traditional educational policy research historically embraced technocratic procedures that often sidestep the complexities, contingencies, and indeterminacies of policy (Ball 2012; Webb and Gulson 2015), discourse theorists are among a group of scholars who have broken from this tradition to offer new problematizations of policy. Many now conceive of policy variously as text, discourse, process, assemblage, enactment, etc. (e.g. Bacchi 2000; Braun et al. 2011). These discursive approaches provide the means for considering the social, historical, and political contexts within which policy exists, emerges, is taken up, and is constituted (Bacchi 2015; Peck and Theodor 2015) as well as implications for power, marginalization, and emancipation (e.g. Fairclough 2009; Howarth 2010; Wodak 1989).

*Discourse* has featured in studies of educational policy as an analytic and methodological tool, theoretical frame, realm of implication, and a foundational definition of educational policy itself (e.g. Bacchi 2000; Ball 2006; Bowe, Ball, and Gold 1992; Koyama and Varenne 2012; Levinson, Sutton, and Winstead 2009). In line with the variety of ways *discourse* is taken up, its analysis ranges across a continuum of grain sizes – i.e. from micro-interactional phenomena (e.g. what people say), meso-institutional phenomena (e.g. how schools or curricula shape ways of meaning and doing), macro-social phenomena (e.g. how circulating ideologies shape how we see and act in the world), to phenomena that can be traced across and between these scales (Anderson 2015, Warriner and Anderson 2017; Canagarajah and deCosta 2016). When combined with the similarly varied range of ways that *policy* is defined, discourse analysis of education policy results in a complex web of possibility for both (a) articulating what counts as the analytic focus of a particular study (epistemology), and (b) how findings and implications are framed in terms of what counts in the world (ontology). Reading widely across education policy studies that employ a range of approaches to discourse analysis makes clear that scholars' positions on what counts as discourse, policy, and the relationship between the two are often left implicit, are not theoretically justified, or are internally inconsistent with other elements of their study (e.g. methods, implications). Our aim in this article is therefore to highlight how differing treatments of discourse and policy align with underlying theories and paradigms informing those approaches, with discourse often conceptualized and operationalized in ways that reflect contested and sometimes contradictory stances on what counts as knowledge or what it means in the world of education policy.

Below, we present findings from an interpretive analysis of 37 empirical studies that bring together educational policy and discourse analysis. Our analysis of this corpus illuminates the ways in which different theoretical frameworks, methodological paradigms, and epistemological vantage points comprise research stances that represent different conceptualizations of discourse, policy, and the relationship between the two. These stances do not exist in a vacuum, but rather are framed by scholarly traditions and networks that themselves are discursively shaped, in part by contested landscapes about what counts as research. We conducted this review from our positionality as scholars grappling with theoretical and methodological issues surrounding policy and discourse in our own research and teaching. We ourselves have taken a range of stances toward discourse and policy, depending on the project we are working on. However, we

have also felt the need on many occasions to better understand the landscape against which discourse analyses in education policy plays out, while also resisting tendencies to delimit or standardize ontological or epistemological possibilities for the field. This article therefore builds on arguments for the need to articulate what Webb and Gulson (2015) refer to as the ontological politic of education policy under which certain methodologies and ideas of subjects gain privilege or preference amongst certain academic communities.

Our purpose in this review is therefore to chart a range of articulations – what is discourse, policy, the relationship between the two, and how those articulations come together within specific studies to shape possible findings – in a given snapshot of time and context (i.e. Anglosphere education policy between 1995 and 2015). Our aim was threefold: to (a) understand the range of definitions and suppositions about discourse and policy, in light of (b) how those shape possibilities for knowledge in the form of methods and findings, and (c) articulating the ‘what counts’ on which these strategies rest – the latter of which is often implicit. In the following section, we articulate our theoretical positioning, including an overview of discourse analysis.

## **Theoretical framework**

### ***Situating discourse analysis***

Discourse – when defined in its broadest sense – includes talk, text, and action as well as more broadly circulating narratives, sets of beliefs, and ways of seeing the world. It can thus be oriented to as a locus of both meaning and/or action, in that discourse can be treated as a vehicle for making meaning, doing things, or both (Warriner and Anderson 2017; Lester, Lochmiller, and Gabriel 2017). Many also view discourse as motivated – i.e. discourse is not neutral but is rather motivated by political interests, power relations, ideologies, rhetorical positioning, etc.

Educational policy is one such site of motivated meaning and action that lends itself to discursive exploration, as it can be understood as situated in texts and/or interactions both by how it is constituted (i.e. what it does) and how it is taken up (i.e. what it is understood to mean). Policy also carries clear ideological, practical, and legal implications for educational practice (Ball 1993; Lester, White, and Lochmiller 2017). As such, educational stakeholders (including the public) often make sense of policy as, and through, texts (broadly defined), which then can become sites for analyses informed by a range of possible epistemological and ontological perspectives.

Discourse analysts of education policy are typically less interested in understanding how well a policy supposedly works and are instead concerned with understanding and/or critiquing the contextual factors that influence (a) policy formation – i.e. the prevailing technologies and rationalities that give shape to a policy, (b) policy enactment – i.e. the situated and material elements that affect how a particular policy unfolds in a given context, (c) the actors and agents involved in policymaking, and (d) the sometimes taken-for-granted assumptions associated with policy and politics (Braun et al. 2011; Lester, Lochmiller, and Gabriel 2017).

Many scholars have also drawn upon discourse analysis to: explore power dynamics within policy (e.g. Wodak and Meyer 2009); destabilize often inequitable,

taken-for-granted systems of thought that underpin policy (e.g. Ball 2003); and to problematize policy as a means for shaping the very ‘problem’ the policy is meant to ‘solve’ (e.g. Bacchi 2000). As described by Taylor (1997), ‘Discourse theory can be used to explore particular policies in their historical context; tracing how policy “problems” are constructed and defined and how particular issues get to be on the policy agenda’ (28).

As policy studies in general – and education policy studies specifically – have shifted away from technicist approaches grounded in post-positivist assumptions to more critical and post-structural approaches, the field has expanded to include a vast array of theoretical and methodological stances from which to conduct policy research. While many scholars (ourselves included) see this discursive turn as positive, or even necessary (e.g. Ball 1993; Taylor 2004), it also presents new challenges for the field, as scholars must interpret multiple (and sometimes) conflicting conceptualizations and operationalizations of policy.

One of the conceptual problems currently lurking within much policy research and policy sociology is that more often than not analysts fail to define conceptually what they mean by policy. The meaning of policy is taken for granted and theoretical and epistemological dry rot is built into the analytical structures they build. It is not difficult to find the term policy being used to describe very different ‘things’ at different points in the same study. For me, much rests on the meaning or possible meanings that we give to policy; it affects ‘how’ we research and how we interpret what we find. (Ball 2006, 10)

This conceptual and terminological murkiness surrounding *policy* is further complicated when discourse analysis is employed in policy research, as similar arguments have been made for overlapping and sometimes competing definitions of *discourse* (e.g. Bacchi 2005). As such, researchers who use discourse analysis as a means of analyzing educational policy and related practices should, but often do not, explicitly define their use of discourse and articulate the role of epistemological assumptions – i.e. what counts (as knowledge, findings, implications, units of analysis) in their analyses and the ontological bases of their implications (i.e. what version of the world and ‘good’ research are being promoted).

Perhaps due to space limitations for publishing, a lack of practice in paradigmatic reflexivity, or a host of other potential reasons, many researchers either fail to fully theorize their position on discourse or take one stance in their study’s framing and operationalize another in the analysis. Rogers and et al. (2016), who reviewed articles that used critical discourse analysis (CDA) in educational research more generally (not just within the field of education policy), pointed out that nearly 75% of the education policy studies that comprised a subset of their larger corpus had either minimal or no description of their analytic procedures.<sup>1</sup> Similarly, Saarinen’s (2008) review of discourse analytic studies in higher education policy found that only half of the 15 studies she reviewed articulated a theoretical stance on discourse, even implicitly.

Our analysis of the literature aims to further unpack the complex and sometimes conflicting ways in which theories, methods, and concepts have been brought together in discourse analytic education policy research. We first discuss the two main paradigms that support much discourse analysis of education policy – structuralism and post-structuralism – in order to situate the analysis of the literature that follows within

these traditions (and the ways they demarcate contested terrain within the aforementioned murkiness to which Ball (2006) alluded).

### **Structuralist and post-structuralist orientations**

The murkiness surrounding implicit differences in the conceptualization and operationalization of both *discourse* and *policy* arguably stem from different theoretical paradigms – structuralism and post-structuralism. While not all scholars who use discourse analysis to examine education policy explicitly orient to these paradigms by name, their underpinnings surface in the ways authors conduct and present their analyses. These underpinnings also provide an important backdrop to discussions of contested (and often implicit) epistemological and ontological assumptions.

Many approaches to discourse analysis are informed by critical theory and operate within a structuralist framework. Structuralism conceptualizes social life as a product of underlying structures (e.g. linguistic, socioeconomic, hegemonic) and attempts to uncover ‘objective laws which govern all human activity’ (Dreyfus and Rabinow 2012, xv). Structuralist approaches to discourse often draw on the Frankfurt School’s approach to critical theory, which sought to affect social change and emancipation by critiquing power structures and ideologies that justify and perpetuate self-interested maintenance of power by the elite.

For example, some forms of Critical Discourse Analysis (CDA) are informed by structuralism. Although the tenets of CDA as laid out by Fairclough and Wodak (1997) include a view of discourse as socially mediated action (which can also be seen to align with post-structuralist tenets, which we discuss further below), other approaches that take the moniker *CDA* and cite these same scholars adopt more of a structuralist stance. CDA of education policy generally examines policy texts (sometimes defined beyond individual, written texts) in order to link educational issues to macro-level structures such as economics, race, or gender/sexuality (see Rogers et al. 2005, 2016 for extensive reviews of CDA in educational research more broadly). CDA in education policy research is thus often concerned with how power and related relations (e.g. ideologies) in the real world are reflected, reproduced, or resisted in micro-textual sites such as policy documents, often focusing on issues of control (Van Dijk 2003). Structuralist-leaning approaches to CDA often examine how texts’ various structural elements (e.g. grammatical, lexical, rhetorical) are robustly linked to (and in some cases seen to be determined by) aspects of social structure (e.g. race, class, gender, sexuality) (Fairclough 1989). The following quote from one of the articles in our corpus encapsulates some key epistemological assumptions of a structuralist approach to discourse analysis of education policy.

‘The value of CDA, according to CDA scholars, lies in its ability to identify the different discourses that exist in a text; problematize existing power relationships in society that are reflected in those discourses; and provide material for the emancipation of oppressed groups (Fairclough 2009, as cited in Kennedy-Lewis 2014, 167).

From this perspective, discourse is ontologically seen to stem from/reside in texts and reflect pre-existing power relationships. Evidence from texts can then be fodder for rectifying power imbalances interpreted in the text as reflective of the real world.

While many forms of CDA and other structuralist approaches seek to locate and disrupt power imbalances, post-structuralist approaches, on the other hand, seek to understand how power came to be established through ‘regimes of truth’ (Foucault 1980), such as through privileged disciplines of knowledge (e.g. biology, psychology). Post-structuralist studies often draw on Foucault (e.g. Foucauldian Discourse Analysis) and view meaning as fluid, blurred, and multiple. It is not that post-structural approaches are *un*-critical; rather, they depart from ‘big C’ critical orientations endemic to structuralist approaches to instead problematize power as the product of systems of knowledge that have been discursively constructed and normalized over time. There is not as clear a locus of power, control, or the source of inequity in post-structuralist views as in structuralist ones. For example, Foucauldian approaches to discourse analysis of educational policy provide one lens for examining policy as constituted by rationalities and logics associated with a particular time and space (e.g. Ball 1990). Further conflating this murky terrain, some scholars who use CDA espouse more post-structuralist assumptions in their frameworks, methods, and findings, while others take on structuralist views.<sup>2</sup>

These differing theoretical underpinnings have direct implications for the ways in which discourse analysts conceptualize and operationalize both *policy* and *discourse* as well as how they analyze educational policy and formulate claims about the world. Given the variety in these treatments as well as their explicitness, we aim to tease apart their various articulations as well as the underlying paradigms that frame the assumptions on which they rest.

## Methods

### Overview of the data

The corpus of 37 peer-reviewed journal articles that we analyze all focus on educational policy and substantively draw on the concept of discourse – i.e. they explicitly use discourse analysis as an analytic method or otherwise operationalize discourse as an analytic tool (rather than simply theorizing educational policy through a discursive lens).<sup>3</sup> These 37 articles were published in 21 different journals and represent a range of geographic regions and educational policy contexts. Analytic methods and forms of data within the wider category of discourse analysis across these articles also vary (see Table 1 for a listing of the articles and their contexts, purposes, methods, and data sources).<sup>4</sup> We next discuss the methods by which we systematically assembled this corpus followed by how we went about analyzing it in order to interpret how discourse is operationalized as a conceptual and methodological frame amidst competing paradigms in empirical studies of educational policy.

### Constructing the corpus

To conduct this search of the literature, we used three academic databases: (a) Journal Storage (JSTOR), which covers social sciences research; (b) Education Research Information Center (ERIC), which is more specific to educational research; and (c) Google Scholar, which is general in its reach.<sup>5</sup> Across these three databases we used ‘policy’ + ‘discourse’ + ‘education’ as search terms in Boolean combination, which initially yielded over 200 unique hits. Our original inclusion criteria constituted peer-reviewed journal articles that focused

**Table 1.** Overview of articles included in the corpus.

Author(s)	Journal	Method/TF	Policy context	Data Sources	Research Purpose
Arnott and Ozga (2010)	<i>Discourse: Studies in the Cultural Politics of Education</i>	CDA	K-12 content curriculum (Scotland)	Government statements, parliamentary debates, major policy texts	Examine how policy makes intentional use of discourse to promote political agendas
Brooks (2011)	<i>Education Policy Analysis Archives</i>	CDA (Fairclough)	Technology and Education (Alberta, Canada)	Policy documents (and related artifacts) and interviews	Describe discursive field of education and discuss implications of leaders' recent entry into the education and technology policy discursive space
Cheng (2009)	<i>International Journal of Educational Management</i>	CDA (Fairclough)	Pre-K vouchers (Hong Kong)	One government policy text	Understand the complexities of the policy change process (beyond rational surface meanings) and key relations between discourses of marketization and social justice
Clark (2005)	<i>English Teaching: Practice and Critique</i>	Historical Analysis (Bernstein)	England's National curriculum (1980s-90s)	Public debates between the traditionalists and progressivists (e.g. interviews with politicians, propaganda materials)	Examine how discourse functions to maintain social order and how attitudes of policy-makers shape practice
Cochran-Smith and Fries (2001)	<i>Educational Researcher</i>	DA (Silverman); rhetorical	Teacher Education reform (U.S.)	Public policy documents, scholarly articles, and transcriptions of public talk (as examples of position statements from various groups)	Explore how discourses in two competing national agendas for teacher education are being constructed, critiqued, and debated
Englund (2005)	<i>Journal of Education Policy</i>	DA (philosophical/historical)	K-12 education and the concept of 'equivalence' (Sweden)	Policy documents (bills, curricula, reports)	Trace shifts in the concept of 'equivalence' in authoritative interpretations in policy and analyze how it shapes schools' role in creating opportunities for the community and individuals
Fataar (2003)	<i>South African Journal of Higher Education</i>	Policy complexity analysis (Ball), historical	Higher Education (South Africa)	Higher Education policy documents (1994-2002)	Reveal the shift in discursive terrain that has made labor-oriented higher education policies possible in post-Apartheid South Africa
Fimyar (2008)	<i>Journal of Education Policy</i>	Foucauldian DA (deconstructionist)	Secondary school management reform (Ukraine)	Policy documents (1999-2003); law on general secondary education (1999); directive on 12-point grading scale in secondary education (2000)	Show how Foucault's governmentality can be applied to post-USSR Ukrainian national identity tensions around education policy
Fitzsimmons-Doolan (2009)	<i>Language Policy</i>	Corpus Linguistics	Language education Policy (Arizona, U.S.)	Newspaper corpora covering Language policy (Official English and policies regulating instruction of language minority students) (1999-2007)	Understand whether public discourse about language policy is really about immigration by measuring degree of lexical overlap between the two in newspaper coverage

(Continued)



Table 1. (Continued).

Author(s)	Journal	Method/TF	Policy context	Data Sources	Research Purpose
Gabriel and Lester (2013)	<i>Education Policy Analysis Archives</i>	Narrative Policy Analysis, Discursive Psychology, Conversation Analysis	Teacher Assessment (Tennessee, U.S.)	Audio recordings of public meetings of Teacher Evaluation Advisory Committee	Conduct a microanalysis of talk to analyze how policy-makers worked up certain versions of Value-Added Models of teacher evaluation that were easier to believe in
Garrick (2011)	<i>Australian Educational Researcher</i>	CDA, post-structural policy analysis (Foucault)	Vocational Education and trade centers in secondary schools (Australia)	Skilling Australia for the Future Rudd Labour Party policy text (2007), NGO surveys/reports, radio broadcast	Pinpoint how discourse was constructed (via metalingual cues and intertextuality) in relation to vocational educational policy and skills crisis and what was marginalized or lost in the process of policy construction
Grimaldi and Serpieri (2010)	<i>Journal of Educational Administration and History</i>	Critical Ethnography	Secondary School management reform (Southern Italy)	Observations of meetings and workplace practices, interviews with provincial counselor/staff/head teachers, policy and official documents	Outline tensions in education reform surrounding enacted neo-liberal policies and possible democratic action via two case studies
Hoskins (2008)	<i>European Educational Research Journal</i>	CDA (implicit)	K-12; learning goals and objectives set by the Lisbon Strategy (E.U.)	Official Lisbon Process policy documents and author experience working directly with European Commission's Centre for Research on Lifelong Learning (CRELL)	To demonstrate competing discourses driving education policymaking (dominant, market-based and social justice-oriented discourses)
Kennedy-Lewis (2014)	<i>Journal of Education Policy</i>	CDA/Critical Policy Analysis	Zero tolerance policies (U.S.)	Legislation outlining zero tolerance policies in all 50 states and interviews with one district's program officer	Examine how competing discourses appear in zero tolerance policy legislation and how the portrayal of educators, students, and school disciplinary practices reflect neoliberal influences
Kilderry (2014)	<i>Journal of Education Policy</i>	CDA/Critical Policy Analysis	Preschool policy (Victoria, Australia)	Four early childhood state government policy documents	Examine forms of control evident in policy and how discourses therein position and affect preschool teachers' decision-making
Leckie, Kaplan, and Eliane (2013)	<i>Language Policy</i>	CDA	Language education policy (Arizona, U.S.)	Minutes, video, and audio transcripts of English Language Learner task force meetings (Arizona, U.S., 2007–10), document describing the language learning models produced by the task force, state statutes describing the task force and instructional model	Reveal how policy discourse actually legitimates efficiency rather than serving the best interests of English language learners

(Continued)

**Table 1.** (Continued).

Author(s)	Journal	Method/TF	Policy context	Data Sources	Research Purpose
Leow (2011)	<i>Discourse: Studies in the Cultural Politics of Education</i>	Bernstein's transmission model	Public health policy in schools (Queensland, Australia)	Extract of texts from four key school health policy documents (2005–2007)	Explore how the language of policies contributes to the reproduction of discourses and shapes policy readers' responses
Liasidou (2008)	<i>Journal of Education Policy</i>	CDA (Foucault, Ball)	K-12 inclusion policy (Cyprus)	Official legislative documents on special education	Deconstruct special education legislation to make transparent how children with special education needs are discursively constructed and how their human rights are silenced
Marshall (2000)	<i>Journal of Educational Policy</i>	Feminist critical policy analysis	Gender Equity in education policy (Australia)	Observations, interviews with gender equity policy insiders/ elites, and document analysis	Examine motivations and strategies behind gender equity policy movement from an insider perspective to show the power of discourse to frame and manage policy
Mayo (2009)	<i>International Studies in Sociology of Education</i>	Textual analysis of keywords and phrases	Higher Education (E. U.)	Lisbon Objectives, Bologna Process, and communications from the Commission of the European Communities (CEC), and the European Council (EC)	Explore policy statements about role/function of Higher Education and demonstrate tensions between neo-liberal and Social democratic discourses (via analyzing key words)
Mulderrig (2012)	<i>Discourse in Society</i>	Corpus-aided CDA	K-12 (under New Labour party, U.K.)	17 white papers (government (New Labour education policy (1972–2005)	Understand how policy (and deictic discourse patterns therein) represents the government and how it shapes the public's complicity in the government's neoliberal enterprise
Nana (2013)	<i>Journal of Bilingual Education and Bilingualism</i>	Thematic analysis	Bilingual education policy (Cameroon)	Classroom observations and interviews with students and teachers at four public primary schools; interviews with regional and national bilingualism inspectors, school and government policy documents (Ministry of Education circular, reports, frameworks)	To relate official bilingualism policy discourse/ determination and its application in primary schools in Cameroon
Nudzor (2012)	<i>Journal of Educational Change</i>	CDA	K-12 (Free Compulsory Basic Education, Ghana)	1992 Republican Constitution of Ghana, fCUBE policy documents, interviews with officials	Analyze (a) how education officials articulate policy intentions; (b) the extent to which components of the policy title are reflected in the implementation process; (c) reveal how the neo-liberal discursive shift shaped education policies
O'Neill (2012)	<i>Educational Research</i>	Foucauldian DA	Teacher Education (New Zealand)	Official government statements, statistical economic data, policy texts	Show how the logic behind 'rational' responses to supposed crises shapes teacher education policy and how it is historically situated in a decades-long trend

(Continued)



Table 1. (Continued).

Author(s)	Journal	Method/TF	Policy context	Data Sources	Research Purpose
Pettigrew and MacLure (1997)	<i>British Journal of Educational Studies</i>	Intertextual corpus analysis (implied)	K-12 schools restructuring policy (grant-maintained schools) (U.K.)	2000+ articles from eight newspapers' coverage of Grant Maintained schools policy (1987–1995)	Trace links between stances, voices, and values across the discursive field of newspaper coverage of school restructuring policy
Saarininen (2008)	<i>Studies in Higher Education</i>	CDA	Higher Education (E. U.)	Organisation for Economic Cooperation and Development green and white papers, Bologna Process documents, and Finnish higher education policy documents	To understand how texts and discourse analysis have been used in higher education policy research and to challenge such methods by calling for a more systematic approach to textual analyses
Salter (2014)	<i>Journal of Education Policy</i>	Policy trajectory studies	K-12 "Know Asia" (Australia)	Interviews with three school leaders and public website documentation of leaders' decision to enact this voluntary policy	To identify discursive threads in one school's institutional narrative to explore how espoused policy is translated at the school site
Samuel et al. (2014)	<i>Discourse: Studies in the Cultural Politics of Education</i>	DA (Bakhtin, Laclau)	K-12 medium of instruction (Malaysia)	53 Malaysian Chinese language newspaper articles covering medium of instruction debate (2009)	To explain how various stakeholders negotiate and discursively construct education in schools by analyzing the discursive processes of policy articulation in the media
Smith (2008)	<i>Higher Education</i>	Detailed textual analysis (CDA; Fairclough)	Higher education (U. K.)	Nine Higher Education policy texts (teaching and learning strategies) from three types of institutions (2002–2010)	To show how reshaping the language (clauses) of policy can also reshape power relations and how staff and students at institutions of higher education can regain agency
Stevick (2010)	<i>Prospects</i>	Sociocultural ethnographic approach	K-12 Holocaust Day (Estonia)	Interviews, observations of classrooms, textbooks, conference and meeting observations	Investigate policy development in light of external pressure from foreign advocates as well as how policy as a normative discourse was constructed between international sources, the national government, and educators
Stewart (2012)	<i>English Education</i>	Discourse Analysis (Bakhtin)	Policy mandates around testing and standardization (U.S.)	Six English teachers' narratives (interviews) about school leaders' communication regarding policy mandates	Understand how school leaders' policy statements shape teachers' autonomy and instructional decisions and to reconceptualize policy discourse in schools
Sung and Kang (2012)	<i>Asia Pacific Journal of Education</i>	CDA	K-12 test results release policy (South Korea)	Government policy texts/reports and related media reports from 10 media sources (2007–2009)	Examine the ideological construction of educational discourses embedded within South Korean print media and reveal the relationships between educational policy-making and agenda-setting
Taylor (2004)	<i>Journal of Education Policy</i>	CDA	K-12 (Queensland, Australia)	Extracts from policy texts associated with "Education Queensland's 2010" Strategy	Explore the possibilities of using CDA for identifying competing discourses in policy texts (including marginalized discourses) and documenting discursive shifts in policy implementation processes

(Continued)

**Table 1.** (Continued).

Author(s)	Journal	Method/TF	Policy context	Data Sources	Research Purpose
Thomas (2004)	<i>British Journal of Educational Studies</i>	CDA	K-12 education reform (Queensland Australia)	One newspaper's reporting on education reform initiative, The Wiltshire Report, Ministry of Education documents, and print media coverage (1992–1994)	Analyze the interrelationships between policy discourses and public media debates to demonstrate the capacity of the public sphere to define educational issues in particular ways and reinforce commonsense understandings of curriculum, schools, and teachers
Välilmaa and Westerheijden (1995)	<i>Higher Education</i>	Case study and DA (social construction of subjects)	Higher Education self-regulation reform (Finland, Netherlands)	Interviews, surveys, committee reports, cases of evaluation studies of introduction and effects of new policy instruments, questionnaire, follow up case study (N = 12) consisting of self-evaluation, visiting committee reports, and semi-structured interviews	To explore the interconnectedness of (a) policy makers' and (b) contract researchers' discourses to see if researchers can do independent research with integrity and still meet needs of their contracts with policy makers
Wright (2012)	<i>Journal of Education Policy</i>	Genealogical policy mapping, Post-structuralist DA	K-12 (U.K.)	Policy papers published by the Conservative Party of Britain (2007–2010)	Examine current education policy discourse and reveal the government's attempts to rearticulate education around market-based logics
Yamagami (2012)	<i>International Multilingual Research Journal</i>	CDA, Interpretive Policy Analysis	Language education policy (California, U.S.)	Campaign documents (essays, text of Prop 227, spoken statements about it) related media coverage (1997–98 – letters to editor, editorials, articles)	Examine political discourse around bilingual education policy, especially key social representations of languages, their speakers, and the main political actors in policy artifacts

on educational policy (as opposed to public or other forms of policy) which analyzed data (as opposed to theoretical or position pieces) and, as mentioned above, used discourse in a substantive way. To apply these criteria, we reviewed the initial 200+ abstracts and, when necessary, skimmed the entire article. We placed no restrictions based on year of publication nor the geographic area or educational context as long as the policy dealt with some form of compulsory or general education.<sup>6</sup> This first pass reduced the set of included articles to 40. After reading them in full, we excluded another six based on their lack of meeting the inclusion criteria. We also added an additional three articles based on a secondary search to catch any that may have fallen through the cracks (in key journals that were not indexed in the three databases or were published in the intervening times between our initial search and the initial stage of research for this article concluded (2013–14).

### **Analyzing the corpus**

To begin analysis, we randomly selected 18 studies with which to start. We first read each article for basic elements, such as methods, definition of discourse, theoretical perspective, and findings. While meeting regularly to discuss the first batch of articles (each taking the lead for half), we refined our note-taking process and, after three iterations, finalized a note-taking template (see Appendix). We next worked through our interpretations of the initial 18 studies by discussing the notes we had individually taken and then working together to construct a synthesizing commentary for each article that included answers to the following questions: What is policy seen to do?; What is discourse seen to do?; What is the study's main point?; and What is the articulated policy-discourse relationship (implicit or explicit)? We created an intermediate analytic table detailing all of the above-named information for each article, which allowed us to start analyzing the studies as a holistic corpus.

We next worked through the remaining 16 articles (from our initial corpus of 34). With this larger set, we were able to revisit the distinctions among studies for each category towards a more nuanced and representative analysis beyond what had initially been simple binaries. Following the same procedure, we constructed similar data transformations to facilitate analysis of the larger corpus. Based on the refinements to our analytic process during the second round, we next returned to the original 18 studies and revised data transformations for those accordingly.

Based on this iterative analytic process, we distilled main analytic categories for describing and making sense of the entire corpus – (1) definition of discourse, (2) epistemological stance, and (3) policy-discourse relationship. These three categories, respectively, get at the 'so what' of each article's analytic aims and framing, operationalization of *discourse*, and specific application of discourse analysis to make sense of education policy. We worked to independently make sense of how each category manifested (explicitly as well as implicitly) across the individual articles, arriving at main types for each category that we felt best encapsulated the range of meaning across the corpus, which we discuss in depth below.

In summary, we reviewed each article individually and then read through our notes and reviewed the actual articles together to check for nuance and detail we might have missed at earlier stages when we had less sense of the overarching corpus or of the final

analytic categories. We also checked for epistemological consistency across the three main components of each study, for which we had realized the need when many studies claimed a certain view of discourse in their framing and operationalized another through their actual analysis. To do so, we attended to the following details – (a) what authors cited as their purpose or goal (including research questions, if included); (b) what they drew on for theoretical and conceptual framing (e.g. Ball's (2006) view of policy as discourse that shapes possibilities for thought and action); and (c) what authors actually did in their analysis and claimed in their findings.

After analyzing the initial 34 articles according to this process, we lastly conducted the aforementioned targeted search in two main journals that frequently published studies pertinent to discourse and educational policy – *Journal of Education Policy* and *Discourse: Studies in the Cultural Politics of Education*. This yielded 18 studies, three of which were in-scope, resulting in the final tally of 37 articles in our corpus. We repeated the creation of intermediate stage analytic representations of notes and tables so that we had a final corpus of 37 studies fully tabulated across multiple data representations.

## Findings

In this section, we discuss the three main analytic categories we used in the analysis – (1) definition of discourse, (2) epistemological stance, and (3) policy-discourse relationship. Following an initial orienting discussion, we provide texture and detail to these categories and draw connections between the types we constructed within them, including overarching implications for how *discourse* is brought to bear on studies of educational policy. For each article, we analyzed each category independently so that assignment to one category did not unquestionably lead to an article's assignment to what sometimes seems like a logical counterpart to the first category. This allowed us to tease apart some of the key discrepancies/tensions between framing and analysis that is key to the methodological implications we discuss below.

### Definition of discourse

These 37 studies' authors variably defined discourse in explicit, implicit, and sometimes contradictory ways within a given article. We thus identified each article's definition of discourse most often through our interpretation of how authors oriented to discourse throughout each study, rather than relying solely on authors' explicit definitions (which were often not articulated, as we discuss below). To this end, we noted verbs, subjects, and objects used in tandem with *discourse* as well as claims made about discourse in theoretical frameworks, findings, and discussions. This process led us to identify two main types of discourse definitions (A and B).

Studies that we identified as Type A orient to discourse as a form of social practice that frames the ways in which policy can be understood and generally align with post-structuralist tenets. Accordingly, discourse is not seen as a representation of reality, but rather as constitutive of realities by making available certain ways of knowing and doing. Related to this set of assumptions, discourse is not seen as something tangible that is controlled by a powerful group or institution, per se, but rather is operationalized as the

field upon which language and concepts are made possible. In this vein, policy *is* discourse, as it works to construct problems and solutions, as well as evidence and arguments (see Ball (1990) and Bacchi (2000) for prominent scholars associated with this definition of discourse). Salter's (2014) definition, one of few explicit examples in our corpus, evinces Type A and its post-structural theoretical lineage: 'Analysis draws on a Foucauldian notion of discourse as socially produced forms of "knowledge" that are commonly accepted as "truths" (Bacchi 2009) and in some way constitutive, rather than reflective of the world' (147).

For studies in Type B, discourse is often described in terms of its instantiation as forms of texts and talk or as a symbolic, ideological representation of reality; these generally align with structuralist tenets. From this perspective, *discourse* is often synonymous with spoken or written language (i.e. text) that portrays underlying thoughts, actions, beliefs, and ideologies. Discourse in Type B is thus seen as evidence by which analysts can discover meanings (e.g. determining hidden agendas, identifying marginalized groups, or highlighting power relations and structures) underlying texts. Theorists commonly drawn upon in Type B studies include Fairclough (e.g. 2009), van Dijk (e.g. 2006) and Wodak (e.g. 2006). Kennedy-Lewis' (2014) definition of discourse illustrates Type B clearly: 'Fairclough's use of the term, also used in this study, reflects an emphasis on the role of language in shaping social practices, perpetuating particular ideologies, and establishing power relationships' (166). Table 2 illustrates Definitions of Discourse Types A and B across all articles in our corpus. We include a short encapsulation of each study's orientation to discourse organized by type (often paraphrased in our own words, as explicit definitions were provided in less than half of the articles but with language that aims to preserve the theoretical and methodological tenets of each study).

### **Contrasting 'definition of discourse' types A and B**

The main distinction between these two definition types lies in a contrast between discourse as doing/becoming (post-structuralist) versus discourse as *a priori* (structuralist), or pre-existing the phenomenon under consideration. Authors whose work we categorize as Type A refer to discourse as constitutive of realities via its action-oriented nature by which frameworks for knowledge, rationalities, logics, and truths are produced. In addition, discourse is seen as socially and historically generated over time, across multiple sites, and as constantly negotiated and re-negotiated. In studies identified as Type B, however, authors orient to discourse as either synonymous with ideology or text, and in either case representative and/or reifying of meanings/structures already out there in the world.

Thus, studies in Type B often define discourse as text, as representations of ideologies, or the means by which the powerful do things to the less powerful (e.g. manipulate opinions, reify social structures) in order to maintain hegemonic power. Type A, on the other hand, portrays discourse as a set of practices that produce the frameworks through which language, concepts, subjects, and realities are made possible. Type A studies associate power with the privileged 'knowledges', but not necessarily portrayed as held by certain people or groups themselves (Bacchi 2000, 52, as cited in Liasidou 2008, 485). Despite these differences, some theoretical overlap crosses both types of discourse definition. For example, Foucault, as well as Fairclough, are cited

**Table 2.** Definition of discourse types.

Author(s)	Encapsulation of Definition of Discourse
<b>Type A – Post-structuralist (N = 20)</b>	
Arnott and Ozga (2010)	Discourses are representations of real and possible worlds that construct problems/solutions and create/recreate the world by constraining possibilities.
Brooks (2011)	Discourses/discursive fields shape ways of thinking and social actors' engagement therein. Focus on discourse highlights the integral relationship between language, sense making, and values.
Cochran-Smith and Fries (2001)	Discourses are publically constructed, common-sense frameworks that can be identified in warrants that contribute to broader debate.
Englund (2005)	Discourse constitutes reality and includes authoritative interpretations of policy documents, which shape relationships between the individual and society.
Fataar (2003)	Discursive terrains provide the language and concepts that allow for ways of knowing, thinking, talking, and doing.
Fimyar (2008)	Discourses construct and justify emerging rationalities of governance and define government responsibility and control.
Gabriel and Lester (2013)	Discourse is action-oriented. Language is constitutive, not reflective of reality.
Grimaldi and Serpieri (2010)	Discourses are sets of practices that justify and produce frameworks for sense-making within which policy takes shape and is discussed.
Liasidou (2008)	Discourse includes written and spoken texts that represent ideologies and frameworks within which policy interpretation and enactment are articulated/constrained.
Marshall (2000)	Discourse shapes possibilities for thought and action through how words, positions, and behaviors are managed to highlight ideological politics and wield power.
O'Neill (2012)	Discourses construct what can be said, thought, done, and also who can say what and with what authority by framing explicit intent, obscuring implicit intent, and/or garnering public support.
Saarinen (2008)	Discourse is both an artifact of social practice (describes policy processes and related power relations) as well as a constitutive form of social practice (policy is discursively constructed).
Salter (2014)	Discourse is socially produced forms of knowledge commonly accepted as 'truths.' It constructs worldviews by constraining ability to speak outside the frameworks that it constructs.
Samuel et al. (2014)	Discourse constitutes relations, entails ways of doing or thinking, and portrays multivocal versions of reality.
Smith (2008)	Discourse reflects and shapes social practice, framing the "way things are" and structuring possibilities for thought and action, in part via representations/exclusions of social actors.
Stevick (2010)	Discourse presupposes an implicit view of how things are and develops around policy, involving active negotiations of meaning and cultural production by multiple audiences.
Stewart (2012)	Discourse is a way of viewing the world and shapes meanings made, creating power asymmetries and excluding social actors from policy meanings.
Thomas (2004)	Discourse is a form of social practice that constitutes a site of hegemonic struggle, which ideologically constructs and defines educational issues and legitimizes control and power.
Välilmaa and Westerheijden (1995)	Discourses are frames of reference, cognitive structures, and ways of knowing.
Wright (2012)	Discourses (re)position and (re)constitute individuals, the state, and frameworks within which the knowable, thinkable, doable are constructed.
<b>Type B – Structuralist (N = 17)</b>	
Cheng (2009)	Discourse is in the linguistic details of policy texts and is represented in social practices. The use of grammar, genre, and style reveals power relations and excluded social actors.
Clark (2005)	Discourse reproduces social order via institutions, reorders power across contexts, and is inextricably linked to social class.
Fitzsimmons and Doolan (2009)	Discourse is the text. It encodes beliefs and undergirding ideologies, which are revealed through lexical patterns and keywords.
Garrick (2011)	Discourses are comprised of key terms and linguistic constructions used in texts, which shape how they are taken up. They represent the world and shape ideology and power relations.
Hoskins (2008)	Discourse is what is spoken, written, and thought, which helps create multiple narratives representing competing ideologies.

*(Continued)*

**Table 2.** (Continued).

Kennedy-Lewis (2014)	Discourses are embedded in texts and reflect hidden, often conflicting, ideologies therein. They position and portray social actors, establish power relations, and reflect implicit power structures.
Kilderry (2014)	Discourse (i.e. language and words) is a form of social practice and institutionalized power that produces power relations. It operates hegemonically and positions social actors.
Leckie, Kaplan, and Eliane (2013)	Discourse is spoken and written text that linguistically represents ideologies. Those in power use language choice to legitimate their authority and actions.
Leow and Siong (2011)	Discourse represents the values and ideologies of policy makers. It reflects/reinforces dominant power relations.
Mayo (2009)	Discourse is the content of policy documents and is reified by texts. It renders realities and excludes certain ways of seeing/doing.
Mulderrig (2012)	Discourse is language use situated in wider political and economic contexts. Pronoun use in texts create a 'discourse world' that constructs participatory boundaries that can exclude social actors.
Nana (2013)	Discourse is the official language of policy. It circulates, is ideological, and may be at odds with practice.
Nudzor (2012)	Discourse is written or spoken language that is socially situated. It can reveal intentions and ideology in policy texts, and those that control discursive boundaries wield power.
Pettigrew and Maggie (1997)	Discourse represents stances toward policy. Constituted across media texts' rhetorical structure, discourse constructs subject positions and frameworks for meaning and value and can marginalize stakeholders.
Sung and Kang (2012)	Discourse is ideologically constructed and embedded in texts. Discourses shape reality through manipulation of public opinion and mutually constitutes hegemony.
Taylor (2004)	Discourse includes ways of representing actions and identities via grammatical features and word choice.
Yamagami (2012)	Discourse is public and political forms of text and talk that establishes meaning systems, or frameworks, within which policy makes sense.

across studies that fall into both Type A and Type B. However, how these theoretical leanings are actually operationalized in the analyses is not always aligned with the espoused theoretical frame, which is why our definitions draw from all sections of each article. We now turn to discussion of the 37 articles' epistemological stances, which brings the prevalence of theoretical/operational disconnect into clearer view.

### ***Epistemological stance***

Epistemological stance refers to how authors frame what counts as knowledge in light of what they analyze and to what ends (claims, implications). Again, we organized our findings according to two main types. Studies within Type A focus on frameworks for meaning that are either seen to entail or allow for the discursive construction of policy problems, solutions, what is seen as possible, or the production and positioning of subjects (e.g. individuals, groups). According to this view, policy and related texts both reflect and shape frameworks for meaning, taking a similar post-structuralist approach as in the Type A Definition of Discourse. Accordingly, authors acknowledge the importance of how policy is understood rather than an interest in policymakers'/stakeholders' intent. Central to Type A is a concern with what can be known and, as a result, said or done. Saarinen (2008) encapsulates this stance when she states, '[T]he significance of language is what it is thought to be used for, not what it is thought to mean' (720).

Studies that fall into Type B analyze texts and language use therein to understand how groups and their rights/responsibilities are portrayed. Such framing is offered as evidence of existing or shifting power relations, intentions, or ideologies that are

premised to exist in the world. These relations, intentions, and ideologies are seen as embedded in texts and leveraged (most often by the powerful) as a means to justify authority and action. Type B also bears similar structuralist leanings as the corresponding Definition of Discourse Type B. Realities or truths are often discussed as underlying the details of texts or policies and are positioned by authors as being discoverable through analysis of texts. As an illustration of Type B, consider Smith's (2008) assertion that 'analysis can surface implicit messages hidden in the structure, organization, and choice of words in a text' (399).

We identified two subtypes within Type B – (a) B1 which locates knowledge about discourse primarily in texts but with an acknowledgment of the role of social structures and practices in reproducing social order, and (b) B2 which locates knowledge about discourse solely in texts (written or spoken). In subtype B1, text and discourse are not synonymous, and data other than texts is also often used to ground claims. What counts as knowledge in subtype B2 is an exegesis or deconstruction of a text's structure, rhetoric, or organization (much like literary criticism); however, in B1 the elements of texts that are analyzed are also socially contextualized. Smith (2008) makes the following epistemological claim indicative of Subtype B1, 'While it is impossible to control how texts are interpreted by readers, the writers of policy will try to influence that interpretation. How language is used to achieve this aim within policy texts needs to be understood' (399). In subtype B2, texts and discourse are used synonymously, suggesting texts are a mirror into discourses and the ideologies seen to underlie them. As an illustration of Subtype B2, Fitzsimmons-Doolan (2009) states that, 'analysis of language policy keywords...in discourse reveal ideology underlying the discourse' (394). Table 3 includes a short encapsulation of each study's Epistemological Stance, organized according to type (and subtype).

### ***Contrasting epistemological stance types A and B***

While Epistemological Stance Type A focuses on what can be known as a result of discourses and their framing, Type B highlights how texts themselves (written and spoken) can be mined for evidence of underlying ideologies and power relations. While both types might take the rhetorical structure of texts as an area of concern, the epistemological tenets shaping the analyses within these types of studies differ. For Type A, the rhetorical structure of policy texts is considered with regard to the positioning and framings that discourse makes possible. For Type B, rhetorical structure is analyzed to reveal what are assumed to be implicit, existing power relations in the world that texts are seen to reinscribe, with a prevalent focus on discrepancies between surface and hidden meanings. Another area of distinction lies in the role of context. For studies in Type A, context is central to understanding and examining policy as situated. For example, Fimyar (2008) examines the contextual conditions that make particular discourses possible, referring to them as a historical, changing 'discursive trajectory' (32). Context in Type B is often less historicized and more immediate to the text at hand and how it positions social actors and their relative power/agency.

When analyzing this corpus of articles for the range of epistemological stances they represent, we noted quite a few points of disconnection between how studies articulated their epistemological stance in the framing of the study (e.g. introduction, theoretical framework, literature review) and how it was enacted in the analysis and findings. For example, some studies in Type B discuss Ball's (1993) notion of policy-as-discourse in their

**Table 3.** Types of Epistemological Stance (A and B).

Author(s)	Epistemological Stance
<b>Type A (N = 16)</b>	
Brooks (2011)	Links between policy documents and prominent discourses illuminate implications of a key social group's entry into the discursive field.
Cochran-Smith and Fries (2001)	Discourse analysis allows examination of how different versions of the world are produced through texts and talk. One cannot know the "true" agenda but can look at common-sense frameworks.
Englund (2005)	Policy has an authoritative role, and the use of key concepts within policy highlights the "reality-constituting" power of language.
Fataar (2003)	Conceptual discontinuities in policy documents are evidence of discursive constructions of power relation and structures, which make available certain ways of making sense.
Fimyar (2008)	Deconstructing competing discourses (governing rationalities) in texts unravel discursive constructions that justify administrative powers.
Garrick (2011)	The use of terms in texts justifies policy arguments and constructs representations of the world, which culturally produce ideologies wherein some discourses are dominant or marginalized.
Grimaldi and Serpieri (2010)	Interaction patterns are evidence of prevailing narratives/scripts; tracing how actors are constructed therein identifies discourses shaping the wider context in which different views of governance play out.
Mayo (2009)	Keywords within policy texts provide evidence of discourses, which shape how something can be discussed and how tensions play out.
Nana (2013)	Language ideological discourses shape ways to see policy issues, linking everyday practice to official policy discourse.
Pettigrew and Maggie (1997)	Policy texts' organization contributes to the construction of positions and arguments over time by selective representation of voices/views.
Saarinen (2008)	Policy words and actions cannot be separated. Discourse analysis makes policy processes visible and highlights ideologies underlying debates, illuminating how discourse construes and is shaped by policy.
Salter (2014)	School leaders transform policy initiatives in their localized context, and tracing narratives and negotiated discourses in interviews illuminate policy's representation and translation.
Samuel et al. (2014)	Analysis of media discourses and how they draw on multiple voices highlights how a variety of agents (including hegemonic agents of the state) position themselves and others in how they frame and contest national policies.
Taylor (2004)	Policy texts' linguistic choices and layout shape how policy is read, implemented, and used. Policy texts are site of a discursive shift wherein competing discourses have been marginalized.
Thomas (2004)	Overlapping discursive sites in the media illuminate how shared public narratives shape policy and destabilize/reframe public discourses and their constructions of power and agency.
Välimaa and Westerheijden (1995)	Discourse interactively constructs ways of knowing, subjects, reality and offers frames of reference.
<b>Type B (N = 21)</b>	
<i>Subtype B1 (N = 12)</i>	
Gabriel and Lester (2013)	Discourse constructs policy in acceptable ways. Deconstructing stakeholders' rhetorical strategies for portraying policy illuminates how groups are positioned in ways that draw from cultural narratives.
Hoskins (2008)	Texts are evidence of discourses, which are comprised of competing narratives that reveal policymakers' intent in more comprehensive ways than just looking at documents alone.
Kennedy-Lewis (2014)	Texts reproduce ideologies. Their analysis reveals hidden discourses and ideologies, which problematizes existing power relationships in society reflected in those discourses.
Liasidou (2008)	Texts construct and sustain asymmetrical power relations. Analysis primarily considers texts' linguistic details for the construction of subject positions and contextualized in broader social relations.
Marshall (2000)	Examining policy motivations and strategies from an insider perspective highlights the power of discourse to frame and manage policy. Words reveal reasons, actions, strategies and when mobilized can manage the discourse according to ideological, philosophical stances.

*(Continued)*

**Table 3.** (Continued).

Author(s)	Epistemological Stance
Mulderrig (2012)	Discourse patterns in policy texts (i.e. semantic functions of pronouns) shape participatory boundaries of who is included/excluded and illuminate a rhetorical shift in government self-representation and the public's complicity therein.
O'Neill (2012)	The material conditions of texts' production and the institutional practices that they defend reveal ideological agendas behind government discourse.
Smith (2008)	Revealing hidden messages in texts' structure illuminates power relations. Analyzing texts' clauses establishes how social actors are represented and the role of discourse in social practice.
Stevick (2010)	Discourse analysis of explicit statements and ambiguities/silences, as well as how symbolic forms intersect with power, illuminates how policy as normative discourse is constructed and meanings are negotiated.
Stewart (2012)	Discourse illuminates the culture of education. Language and its use reveals tension between policymakers/standardization and teachers/particularities when communicating policy.
Sung and Kang (2012)	Analysis of spoken and written texts (and how they are situated in context) reveals hegemonic (re)production and transmission of policy.
Wright (2012)	Deconstructing key texts and genealogical mapping of the articulatory characteristics and dimensions of discourse reveals the logics of policy development and the agendas of policymakers.
<i>Subtype B2 (N = 9)</i>	
Arnott and Ozga (2010)	Discourses represent power relations and structures, of which texts serve as evidence.
Cheng (2009)	Texts' details reveal discrepancies between surface and implicit power relations and meanings.
Clark (2005)	Meaning is in texts and in the transmission of discourse (via structures that allow it to be heard).
Fitzsimmons-Doolan (2009)	Texts' keywords and lexical patterns reveal encoded beliefs and ideologies.
Kilderry (2014)	Word choice in policy texts uncovers hegemony, produces social relations, reveals people's positioning, and informs understanding of policy agendas and privileged bodies of knowledge.
Leckie, Kaplan, and Eliane (2013)	Discrepancies between surface and implied meaning in texts reveal interests of the powerful. Language choice in texts legitimates authority and actions.
Leow and Siong (2011)	Analysis unmask the hegemony embedded within policies wherein schools and teachers' identities are constructed.
Nudzor (2012)	Meaning and intention can be found/discovered in texts. Interviews with officials about their intentions reveals how neo-liberal ideologies affect policy and practice.
Yamagami (2012)	Multiple implicit and explicit meanings in texts are discovered via keywords and actions (i.e. how groups named, described, (de)legitimized) which are invoked to garner public support in a policy debate.

framing sections, which aligns with Type A. However, the analysis and claims made in these studies led us to categorize them as Type B, because the definitions or theoretical framings in the front matter of the studies were not necessarily operationalized in the analysis or claims. We return to these points of disconnection again in the discussion.

### **Policy-discourse relationship**

The third analytic category we considered is the relationship between policy and discourse that authors formulated (implicitly or explicitly) in each article. As we worked through the corpus, we arrived at six categories for describing the different ways that authors framed the relationship between policy and discourse. This was by far the most complex of our analytic categories to identify and disentangle. Moreover, there are more gray areas and slippages than points of correlation between policy-discourse relation types and the prior two categories (the latter of which had a rough A-B correspondence one might expect, even if that was sometimes thwarted as we discuss below).

Initially, we simply worked within a binary relation, labeling types as policy-dominant or discourse-dominant (Anderson, Holloway, and Rice 2015). However, we soon realized that this was far too simplistic a distinction. Over many iterations, we felt the following six types encapsulated the distinctions of the relationship between policy and discourse across these 37 studies with more nuance: (1) policy offers evidence of underlying discourses; (2) discourse mediates policy; (3) discourse constructs frameworks for policy; (4) policy and discourse mutually shape each other; (5) policy is a form of normative discourse; and (6) ‘policy discourse’ as a unified entity. As with the prior two analytic categories, we characterized articles based on how authors articulated facets of the policy-discourse relationship across the entire article and did not just judge based on singular articulations. We thus took into consideration how authors oriented to the relationship via analysis and claims as well as theoretical framing and overt definition (the latter of which was less common).

### **Type 1: policy offers evidence of underlying discourses (N = 8)**

In this type of policy-discourse relationship, authors orient to discourses as pre-existing or underlying policy (*a priori*). The examination of policy texts is presented as a method for identifying the discourses at work in a given policy context. Discourse is thus seen to be *in* or revealed *by* policy texts as well as being about policy, with policy representing or reflecting discourse. In these cases, policy texts and artifacts are cited as a form of evidence about discourse(s). Most (N = 5) of the studies we categorized as this type focus on linguistic details of policy texts (e.g. keywords, grammatical constructions) at a micro-textual level, while some (N = 3) focus on concepts, values, or structures at a more macro-social level. Table 4 below articulates the policy-discourse relationship we interpreted as Type 1 across the eight studies we categorized as such.

### **Type 2: discourse mediates policy (N = 8)**

Studies that we characterized as the second type of Policy-Discourse relationship posit that discourse frames how policy is interpreted as well as its outcomes. Discourse in these studies is usually defined as what people do, say, or write, with those in power especially implicated. Type 2 studies focus on how debates and dominant groups’ discourse (often

**Table 4.** Policy-discourse relationship 1: Policy offers evidence of underlying discourse(s).

Author(s)	Type 1 (N = 8)
Cheng (2009)	Policy reflects circulating discourses. Discourse is in policy texts and reveals power relations and excluded social actors via grammar/genre/style.
Englund (2005)	Policy represents discourse. Discourses are identifiable in policy documents and express the state’s values and structures.
Garrick (2011)	Policy texts represent multiple, hybrid discourses. Policy texts’ linguistic construction (e.g. key terms, metalingual cues) promote certain discourses and marginalize others.
Hoskins (2008)	Policy texts reflect a composite of multiple discourses and competing narratives. Discourses are represented in policy texts.
Kennedy-Lewis (2014)	Policies reflect and provide evidence of underlying, competing discourses. Policy language reflects implicit power dynamics and perpetuates/reveals competing discourses.
Mayo (2009)	Policy represents/reifies discourses. Keywords in policy documents provide evidence of discourses and contain key terminology on which discourse rests.
Taylor (2004)	Policy texts are sites for competing discourses. Linguistic choices in policy texts highlight hybrid discourses, which have implications for how policy texts are read and implemented.
Wright (2012)	Policy texts are a form of evidence about underlying discourses. Deconstructing policy documents illuminates policymakers’ agendas and logics by which policy comes to be.

discussed in tandem with ideology) shape actual policy outcomes. Such shaping occurs via media (by shaping public opinion) or through narratives and texts (e.g. by government leaders) that reinforce dominant ideologies. Discourse is thus seen to shape policy realities through its ideological control by concrete groups of social actors by positioning people (and their rights/roles/responsibilities) or selectively representing voices, thus shaping relations and legitimizing ideologies. While most studies in Type 2 orient to discourse as texts (and micro-details, such as keywords) ( $N = 5$ ), a few define discourse as frameworks for seeing the world ( $N = 2$ ). However, all align around an orientation to the relationship between discourse and policy as one in which discourse shapes and influences what policy does in the world (not just its possibilities). Table 5 articulates the policy-discourse relationship we interpreted as Type 2 across the eight studies we categorized as such.

### ***Type 3: discourse constructs frameworks for policy ( $N = 8$ )***

Studies that we grouped into Type 3 bear similarity to Type 2 in that they are concerned with how discourse frames or mediates policy. However, while Type 2 studies focus on how discourse shapes concrete realities for who can do or say what related to policy development and outcomes, Type 3 studies are more concerned with the ways discourse shape possibilities for thought and action (rather than outcomes). In other words, Type 3 studies analyze discursive frameworks for meaning and sense-making of and with policy as well as the rationalities and shaping what seems natural or logical. By focusing on how discourse provides logics that justify authority/power relations, legitimize agendas, or otherwise frame possibilities for action/agency (but not necessarily how outcomes constrain the agency or power of particular groups), all studies in Type 3 align with a definition of discourse as a form of social practice (Definition of Discourse Type A). Table 6 articulates the policy-discourse relationship we interpreted as Type 3 across the eight studies we categorized as such.

### ***Type 4: policy and discourse mutually shape each other ( $N = 3$ )***

According to Type 4, policy and discourse are seen to mutually influence each other and thus exist in a dialectic relationship. The three articles we categorized within this type describe both

**Table 5.** Policy-discourse relationship 2: Discourse mediates policy.

Authors	Policy-Discourse Relationship Type 2 ( $N = 8$ )
Fitzsimmons-Doolan (2009)	Discourse is a site for policy debate that influences policy outcomes and represents underlying ideological beliefs of which policies are a product.
Kilderry (2014)	Discourses highlight political agendas and power relations. Discourse shapes what policy can be about. Teachers' positioning in policy documents shapes conditions within education and possibilities for agency.
Nudzor (2012)	Officials' rhetoric frames the ideological boundaries of discourse, which mediates policy and can lead to discursive shift in policy practice.
Pettigrew and Maggie (1997)	Discourse represents ideological stances on policy and contributes to public debate by constructing issues and stakeholder positions with selective representation of views and voices in the press.
Samuel et al. (2014)	Discourses illuminate how policy is ideologically framed by a variety of political actors via its articulation in the media and can either legitimize or counter hegemonic positions.
Sung and Kang (2012)	Discourse practices animate and realize policy. The dominant group controls policy texts via regulative, ideological discourses in media debates, which can change public discourse.
Thomas (2004)	Discourse projects a shared public voice onto policy, which constructs and reinforces commonsense understandings/ideologies. Policy is a site of discursive struggle (e.g. media debates) through which power is constructed and control is legitimized.
Yamagami (2012)	Discourse, or media coverage of key actors in policy debates (and words describing them), frames policy and shapes its meanings/outcomes. How various parties to the policy debate shape systems of meaning influences public discourse.

**Table 6.** Policy-discourse relationship Type 3: Discourse constructs framework for policy.

Author(s)	Policy-Discourse Relationship Type 3 (N = 8)
Arnott and Ozga (2010)	Discourses are resources that shape policy to consolidate governing power and limits that which can be thought and done about a policy problem/solution. Policy is discursively constructed in texts and speeches.
Cochran-Smith and Fries (2001)	Discourse provides sense-making frameworks in which policy solutions make sense. The way discourse frames policy problems in light of values and politics in debate makes certain solutions seem logical or not.
Fataar (2003)	Discourse shapes policy positions (with some becoming hegemonic) and makes certain policies possible. Conceptual (dis)continuities in policy documents reveal shifting discursive trajectories that illuminate a policy's historical and social contexts.
Fimyar (2008)	Deconstructing policy documents unpacks the discursive frameworks/rationalities that make policies possible. Discursive constructions embedded in policy documents justify government authority in controlling policy decisions.
Gabriel and Lester (2013)	Discourse constitutes and legitimizes policy development and implementation (at micro-talk and macro-cultural levels). Discourse provides resources for positioning ideas/assumptions as natural or taken-for-granted.
Saarinen (2008)	Discourse constructs ideologically loaded views of policy as generally accepted knowledge. Discourses highlight relative foregrounding/backgrounding of policy problems and actors, which varies with assumed audience (and can narrow space for alternatives).
Salter (2014)	School leaders mobilize multivocal discourses to transform policy in accordance with local strategic priorities. Normative assumptions and deficit discourses ideologically represent students in a narrow way. Discourse translates and transforms policy.
Smith (2008)	Discourse (i.e. language of policy texts) strategically influences how policies are formulated and pursued. Analysis of policy texts' structure reveals positioning of groups, power differentials, and possibilities for action/agency.

(a) policy as constituting or mobilizing discourse, and (b) discourse as framing, legitimizing, construing, and making possible the conditions for policy. Central to this type of policy-discourse relationship exists a two-way road in which neither policy nor discourse is seen as the primary agent. Articles in Type 4 focus on how policy works with an interest (e.g. to maintain social order, manipulate words for ideological ends) or how policy can create spaces for renegotiating competing discourses. All studies in Type 4 examine tensions and connections between various discourses or counter-narratives to illuminate what is possible, for whom, and to what ideological/political ends. Table 7 articulates the policy-discourse relationship we interpreted as Type 4 across the three studies we categorized as such.

**Type 5: policy is a form of normative discourse (N = 7)**

The fifth type of Policy-Discourse relationship recognizes policy as a form of discourse, thus blurring the boundaries between the two as distinct phenomena, but falling short of eliding the distinction (as with Type 4). According to articles that we categorized

**Table 7.** Policy-discourse relationship Type 4: Policy and discourse mutually shape each other.

Author(s)	Policy-Discourse Relationship Type 4 (N = 3)
Clark (2005)	Discourse shapes policy by framing what is thinkable and unthinkable AND Policy regulates discourse as a means of maintaining social order and distribution of power
Grimaldi and Serpieri (2010)	Discourse shapes policy and the wider contexts in which policies are enmeshed (illuminating struggles between competing agendas) AND Policy can create spaces for renegotiating underlying, competing discourses
Marshall (2000)	Discourse shapes policy by wielding power according to ideological politics (including counter-narratives). AND Policy mobilizes discourse, manipulating words/symbols for ideological ends (e.g. to delegitimize groups, position issues as irrelevant/irrational)

within this type, policy is construed as a normative manifestation of discourse, arising from authoritarian or normative positions (sometimes attributed to specific social actors or groups). Similar to Type 3, studies in Type 5 position policy (but not discourse) as constructing possibilities for what is seen as possible. Also bearing similarity to Type 2, studies in Type 5 see policy (rather than discourse, again) as producing/sustaining power relations or legitimating policy outcomes such that the discourse in support of a policy seems neutral, natural, or the only possibility. However, studies that we categorized as Type 5, unlike the prior categories (Types 2 and 3), position policy as the main agent rather than discourse. Many authors of studies in this type also recognize the multifaceted or multivocal nature of policy processes, implying that deconstruction of authoritative discourses within those processes is possible, even necessary, for social change. [Table 8](#) articulates the policy-discourse relationship we interpreted as Type 5 across the seven studies we categorized as such.

### ***Type 6: 'policy discourse' as unified entity (N = 3)***

Articles that we identified as the last type of Policy-Discourse relationship do not distinguish between policy and discourse as separate constructs in their theorization or analyses. Using the term 'policy discourse' throughout their studies, authors treat them as a unified entity. Each of these studies contrasts 'policy discourse' with other discourse types as a main tenet of their analyses – i.e. public discourse, dominant/master discourses, practical discourse, research discourse. Authors also use 'policy discourse' synonymously with other types of discourses (e.g. official, organizational). These studies therefore are distinguished from all others in our corpus in that they focus on a policy-discourse nexus in order to distinguish it from other related processes and examine influence or disconnects therein (e.g. between official policy and its application, between research conducted in order to influence policy and the policy discourse (sense making) itself). [Table 9](#) articulates the policy-discourse relationship we interpreted as Type 6 across the three studies we categorized as such.

### ***Contrasting policy-discourse relationship types 1 through 6***

As we have discussed throughout this section, the six types of policy-discourse relationships we have proposed to encapsulate the variety across these 37 articles can be compared and

**Table 8.** Policy-discourse relationship Type 5: Policy is form of normative discourse.

Author(s)	Policy-Discourse Relationship Type 5 (N = 7)
Leckie, Kaplan, and Eliane (2013)	Policy is a manifestation of competing, authoritarian discourses that serves those in power and legitimates outcomes.
Leow and Siong (2011)	Policies frame and transmit discourses, which legitimize/reinforce dominant power relations. Policies embed hegemonic discourses and personify dominant social ideologies. Policies construct identities based on how teachers read and react to policy demands and definitions of rules/roles.
Liasidou (2008)	Policy is a multivocal form of discourse that inscribes unequal power relations, maintains authoritarian agendas, and shapes how education is envisioned and realized.
Mulderrig (2012)	Policy discourse shapes how we see rights, roles, and responsibilities and constitutes social relations. Patterns in policy texts shape who is included or excluded.
O'Neill (2012)	Policy is a form of discourse that constructs what can be said/done, manifests politicians' intentions, and legitimizes policy.
Stevick (2010)	Policy is form of normative discourse that is multifaceted and shapes who can say and do what and constructs power imbalances.
Stewart (2012)	Policy is an authoritative form of discourse that makes claims about how the world should be and shapes possible meaning about how teaching and learning are to occur.

**Table 9.** Policy-discourse relationship Type 6: ‘Policy discourse’ as unified entity.

Author(s)	Policy-Discourse Relationship Type 6 (N = 3)
Brooks (2011)	Language of policy documents (i.e. “policy discourse”) influences public discourse by endorsing ways of thinking and encourages/discourages social actors from engaging. Assumptions embedded in language use identify other discourses that shape “policy discourse”.
Nana (2013)	“Policy discourse” refers to circulating language ideological discourse (e.g. official policy rhetoric), which contrasts with actual practices and attitudes expressed in schools.
Välilmaa and Westerheijden (1995)	“Policy discourse” denotes one type of expectations and attitudes about the purpose of research, in contrast to “research discourse” as another type. Policy discourse creates understanding of reality and socially constructs subjects/actors and knowledge.

contrasted along a few dimensions. One concerns whether discourse, policy, or neither is seen as the dominant driver of analytic interest. For Types 1 and 5, policy is seen as the driver of phenomena about which discourse is a form of evidence or source of understanding. Types 2 and 3, on the other hand, presume that discourse shapes policy and its outcomes. Lastly, for Types 4 and 6, neither policy nor discourse is seen as a primary agent.

Another dimension by which these types can be compared involves an interest in policy and discourse as tools or platforms by which groups wield power or as sites in which power relations play out (versus being agnostic to power dynamics or relations). Studies we categorized as Types 2, 3, 4, and 5 often (but not always) posit that policy and discourse centrally relate to the marginalization of groups, consolidation of power, and selective representation of ideas, while Types 1 and 6 are relatively agnostic to issues of power.

## Discussion

As demonstrated by the 37 articles considered in this review, discourse analysis provides scholars with analytic tools for understanding education policy in ways that acknowledge its complex and dynamic nature. Consistent with the ‘discursive turn’ in social science research more broadly (Butler 1999; Gee 1999; Hall 1997), an uptick in the prevalence of discourse analysis in education policy research occurred in the early 2000s, with another sharp surge in 2008 and beyond (25 of the 37 articles we reviewed were published in 2008 or later). This shift in focus toward interactional, textual, and contextual treatments of policy has also presented challenges for analysts in terms of tracing the many paradigmatic and theoretical lineages that inform policy studies. While traditional approaches to policy analysis attempted to measure and evaluate policy effects as well as to compare these outcomes against policy intentions according to, more or less uniformly post-positivist assumptions, discourse analysis has offered a range of tools and lenses for making sense of the complexities involved in all facets of education policy and to contextualize their studies by considering social, political, and historical influences.

Due to the varied possibilities for ontological and epistemological stances within discourse analyses of education policy, it becomes increasingly important to clearly articulate the many possible definitions and assumptions shaping analytic approaches. What we have found in our review (which is consistent with similar, more focused reviews, e.g. Rogers et al. 2005, 2016; Saarinen 2008), is that studies applying discourse analysis to studies of education policy often gloss over justifications for their specific theoretical and methodological approaches as well as omit explicit definitions of ‘policy’

or ‘discourse’. Given the well-documented pluralities of what we can mean by ‘discourse’ (Bacchi 2005) and ‘policy’ (e.g. Ball 2006), as well as the expanded variety of paradigms that can frame research after the discursive turn of the 1980s and 1990s, education policy researchers who use discourse analysis have a particular responsibility to define these terms and the way in which they are brought to bear on analyses. That being said, we also acknowledge that choices about theory and method are not only shaped by authors’ own convictions or worldviews but also by their audience, outlet, particular research problem, collaborators, and sociohistorical moment. In fact, the field of education policy studies itself exists is disciplinarily situated, with Anglophone-Anglosphere institutional centers of such scholarship further shaping ‘what counts’ in ways that authors are often unaware or complicit (ourselves included).<sup>7</sup> While we are not arguing for the adoption of certain approaches over others, we do argue for clarity and consistency within a given study as to how authors define discourse, the coherence of that definition with the types of knowledge claims they construct through their methods, and stances on the relationship between discourse and policy that are commensurate with these articulations and formative theoretical approaches (e.g. structuralism, post-structuralism).

We draw specific attention to the analytic categories featured in this article – definition of discourse, epistemological stance, and policy-discourse relationship – as these are particularly important in shaping readers’ understandings of each study’s purpose, analytic approach, and implications. We also found that the intersections between these analytic categories had clear implications for the way discourse was positioned as a lens or tool for making sense of policy, including its processes and outcomes. As such, these analytic categories can also present new problematics when lacking internal theoretical and epistemological coherence. No single component can be lacking in coherence; rather it is the way they are brought together into a research design, epistemological assemblage, or logic of inquiry to drive a given study where coherence can become an issue. We are careful not to suggest that any of the studies included in this review were conducted poorly or incorrectly; rather we call attention to some common patterns of inconsistency that were present, arguing that such inconsistencies might obfuscate the stated intentions of the analyses. We then provide some recommendations for how discourse analysts might ground our work in clearer definitions and frameworks moving forward.

### ***Areas of disconnect***

Perhaps the most apparent area of misalignment in this corpus entailed disconnects between articles’ theoretical frameworks and analytic methods. This may come as no surprise given the slipperiness of terms and concepts often associated with discourse analysis and education policy research in general. For example, the term ‘critical’ was often used to frame the theoretical approach to the study, commonly referencing Ball (e.g. 2003, 2012) and Fairclough (1992, 1993, 2003) to theorize the relationship between policy and discourse or to claim that ‘discourse’ is more than just text and documents (e.g. 12 studies cited Ball, and 16 cited Fairclough). Since Ball is a leading scholar in the field of critical policy studies, and Fairclough is a foundational scholar of CDA, it follows that their work was instrumental in many cases. The problem, however, arose

when these citations were not made in tandem with specific reference to how these foundational works informed authors' overall methods/findings or what made the study critical (e.g. a critical sociological approach informed by Ball, Fairclough's particular approach to CDA). Such conflations were further complicated when adjacent references posed potentially conflicting approaches to epistemological and theoretical stances without an ensuing articulation of how they were being used together. This is not to say that scholars cannot work across theoretical and conceptual traditions. However, the common paradigm of structuralism was sometimes borne out in studies that claimed in their theoretical and methodological frameworks to follow scholars who do not share those assumptions.

Liasidou (2008) stands as an exemplar of how one might draw strategically across multiple theoretical lenses, while guiding the reader through her approach in doing so. Building on the works of Fairclough (1995), Ball (1993), Bacchi (2000), Taylor (1997), Foucault (1977), and Van Dijk (1993), Liasidou carefully and consistently explains how she draws on each of these prior works throughout her analysis. She contends that 'researchers [should] build their arguments in coherent and clarified ways, thus explicating how the discourse is constituted and "how discursive structure produces effects and functions" (Wood and Kroger 2000, 172), particularly in previously unnoticed and nebulous situations' (Liasidou 2008, 494).

Another disconnect that warrants consideration deals with the relative consonance of studies' operational definitions of discourse and epistemological stances (with Type A Definition of Discourse and Type A Epistemological Stance being consonant and Type B of the same two categories also consonant with each other). Of the articles included in this review, over one-third (14 of 37) demonstrated some degree of disconnect between their definition of discourse (implied or explicit) and their epistemological stance (also implied or explicit). The most common disconnect occurred when authors who defined discourse as that which constitutes reality/ies – i.e. Type A, which is typically associated with post-structural understandings of discourse – worked from the epistemological assumption that knowledge can be derived from directly looking into the texts and associated social practices (i.e. Type B1), or from texts alone (i.e. Type B2), the latter types being more commonly associated with more structuralist forms of CDA. We noted the A/B1 disconnect in seven articles and the A/B2 disconnect in two articles. Five articles also defined 'discourse' as that which represents reality and/or ideology (i.e. Type B), but worked from the epistemological assumption that knowledge can be constructed from identifying and tracing evidence of how policy, knowledge and/or truths have been discursively constructed and accepted over time (Epistemological Stance Type A). Again, this stance positions structural definitions of discourse as compatible with post-structural assumptions. These categories are fundamentally different and stem from different theoretical domains (e.g. structuralism vs post-structuralism). While it is not impossible to draw across these domains, it should be done carefully with explicit acknowledgement and justification for how theory and epistemology inform the study's methodology.

As for the Definition of Discourse, only 15 of the studies offered an explicit definition, while an additional 13 provided an implicit one (i.e. authors referred to concepts in relation to discourse, such as how 'language', 'texts' or 'ideologies' might be associated with discourse without explicitly defining it). The other 9 articles did not articulate any definition of discourse. While Bacchi (2005) warns that scholars should

not attempt to identify a single ‘correct’ definition of discourse, clarification in how we define and operationalize the concept in relation to our theoretical assumptions and methodological processes in actual studies is crucial. Also, if authors choose to draw across theoretical domains, some justification for doing so would help the reader understand what can be learned (and acted upon) from the study’s research design. One way forward might come from considering Bacchi’s (2005) distinction between *discourse analysis* and *analysis of discourse*:

In the *discourse analysis* tradition, much of the material analysed comes from interviews. The task is to identify how individual subjects negotiate their way through pervasive but conflicting ‘discursive structures/meanings’ (Stapleton and Wilson 2004, 46). The *analysis of discourses* tradition includes a wide array of theorists united by the project of identifying and analysing discourses within texts. This tradition includes policy theorists intent on textual analysis of policy speeches and documents (Bacchi 2000), and critical discourse analysts more generally, whose goal is to identify aspects of the ‘political nature’ of systems of thought (Roberts 2004, 34). This group is interested in discourses in the plural, rather than in analyzing discourse (conversation). The distinction between these two traditions should not be drawn too sharply. Clearly the interest of discourse analysts in discursive structures/meanings indicates sensitivity to the interpretive and conceptual schemas that form the primary focus among those interested in the analysis of discourses. At the same time those interested in the analysis of discourses often pay heed to the use of metaphors and speech patterns within the text studied (199–200).

Taking Bacchi’s clarification into consideration might help explain some of the disconnects that we identified in our analysis. Specifically, we might use Bacchi’s distinction as an anchor point from which to unpack the assumptions associated with various discourse and policy studies traditions, alongside the analytic categories we arrived at and applied in the present study, while also acknowledging that such scholarship has been constituted by historically privileged and influential schools of thought.

## Conclusions

Discourse analysis as a theory, method, and tool has illuminated ways that education policy is messy and dynamic. Evaluative approaches to policy analysis might be appealing to policymakers and other government officials due to their supposed promise of efficiency and accuracy. However, discourse analytic approaches offer analytic and practical complementarity via their demonstration of the complexities of policy development and the context-dependence of policy effects. As such, discourse analysis offers invaluable tools for understanding the ‘how’ and the ‘why’ of education policy (rather than just the ‘what’ or ‘whether’), especially as policy landscapes and networks are shifting to more global terrains and relationalities (Ball 2012; Rizvi and Lingard 2009).

In this article, we have argued that acknowledgement of conceptual definitions and theoretical and epistemological stances are paramount toward establishing methodological coherence that allows for the continued creative and productive uses of discourse analysis to push the field forward. Our argument follows Rabinow and Rose’s (2003) call to treat ‘indeterminacies, contingencies and difference as assets rather than as disconfirming evidence that feeds into already established logics of “science” and established logics of “justice”’ (13, as cited in Webb and Gulson 2015, 46). Therefore, our effort is not to ‘tame the wild profusion of

existing things' (Foucault 1970, xv, cited in Lather 2006, 36), but rather to illustrate the complexity of the various ways discourse analysts structure and execute their projects in order to study educational policy. It would seem that there are as many ways of doing this as there are people who do it, which is itself not problematic. However, our conclusions from the analysis of these 37 articles is that complications in terms of theoretical and analytical coherence might prevent the promise we expect from our collective and individual work. The analysis of literature presented here took years to complete and only brings us through articles published in 2014. With the proliferation of discourse analytic studies focusing on education policy in the ensuing years increasing exponentially, the field is ripe for further analysis of this dynamic and evolving sub-field from 2015 onward. We hope that this initial consideration can help identify the conceptual boundaries between operationalizations of *discourse* and *policy*, epistemological assumptions informing methods and findings, and ontological stances on the purpose and promise of research. Yet, we remind readers that these categories are never fixed, and that cracks and fissures within and between them always provide potential 'site[s] of being and becoming' (Lather 2006, 52) to emerge.

## Notes

1. Rogers et al. (2005) Rogers et al. (2016)) conducted two extensive literature reviews of educational research studies that use CDA. Their 2016 study comprised 257 total articles, some of which relate to education policy. Rogers and colleagues' studies differed from ours in focus and purpose in that they specifically focused on CDA but across educational research studies more broadly. Further, they focused on studies' findings in order to characterize the nature of CDA and implications for methods, theory, and the field of education. The present study, on the other hand, looks at education policy specifically and discourse analysis more broadly to understand how discourse analysts define policy, discourse and the relationship between the two, and how these conceptualizations inform possible findings and implications related to education policy and methodological approaches to policy studies. We therefore focus less on the findings from the studies and more on the processes of the analyses.
2. An important note about terminology is that many scholars also engage in approaches to discourse analysis that are not named like CDA and Foucauldian DA are. Therefore, in our analysis we sometimes had to deduce an approach to discourse from the theoretical stance taken as well as the ways analyses were carried out.
3. A non-substantive use of *discourse* would entail using the term in the introduction, literature review, or conclusions but not in the theoretical framework, methods, or findings. For example, Woods and Woods (2002) was excluded from the corpus we analyzed because their use of *discourse* was limited to four instances to refer to 'dominant technical-rational discourses' of the Labour party regarding what counts as valued learning (262). Their analysis takes the form of a concept map by which they chart 'contemporary developments in policy on school diversity' (254) without an explicit grounding in a theoretical or analytic framework rooted in discourse or discourse analysis (writ large). This is not a value judgment on the article; it merely serves as an example of a study that we excluded because the use of *discourse* was not substantive.
4. Our initial search yielded many articles that used *discourse* as a theoretical framework or discussed it as part of policy processes or enactments. However, we limited our analysis to articles that cite discourse as a concept on which an empirical analysis was based. All non-

empirical studies were excluded, which included many in the journals *Education Policy Analysis Archives*, *Education Policy*, and *Discourse: Cultural Studies in the Politics of Education*.

5. We chose these databases for their complementarity (e.g. ERIC and JSTOR overlap but focus on distinct disciplinary bases, while Google Scholar is not discipline-specific and also features an easily accessible reverse citation search functionality).
6. We considered all years of publication up to and including the year we began analyzing the studies and writing the article, 2014. A follow-up study targeting years 2015-present would be insightful and could be replicated using our methods.
7. We are grateful to an anonymous reviewer for pushing us to articulate this point.

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## Disclosure statement

No potential conflict of interest was reported by the authors.

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## Appendix. Note taking template

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Article Citation (APA)

Area of policy (k-12; bilingual education, etc.)

Context of study (country, state, etc.)

Goals of paper

Research Questions

Theoretical Framework

Data Sources/objects of analysis

Methods of analysis

Findings/Claims

Implications (analysis, theorizing, conceptualizing policy, nature of discourse, power relations, enacting change)

Definition of Discourse

How discourse operationalized (e.g. as context, implication, analytic lens, etc.)

Relationship between policy and discourse articulated

Verbs/subjects/objects used with 'discourse'

Verbs/subjects/objects used with 'policy'

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