Research in the field of education policy:
theoretical and epistemological perspectives and the place of pluralism

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ABSTRACT

This paper presents an analysis of the theoretical and epistemological perspectives of a sample of 140 papers on education policy, written by Brazilian authors, and published between 2010 and 2012. Most works were classified in the combined theorization referring to methodological pluralism. It was concluded that: a) there is a need to deepen the discussions on methodological pluralism and the possibilities and limits of combined theorization as theoretical underpinning for the research on education policy field; b) the deepening of the studies on epistemology and the theories that have been used in education research emerges as an important task in the current context, as the theoretical framework plays a key role in research.

KEYWORDS

education policy; epistemology; pluralism.

A PESQUISA NO CAMPO DA POLÍTICA EDUCACIONAL: PERSPECTIVAS TEÓRICO-EPISTEMOLÓGICAS E O LUGAR DO PLURALISMO

RESUMO

Este trabalho apresenta uma análise das perspectivas teórico-epistemológicas de uma amostra de 140 artigos de política educacional, de autores brasileiros, publicados entre 2010 e 2012. A maioria dos trabalhos foi classificada na categoria teorização combinada, a qual remete ao pluralismo metodológico. Concluiu-se que: a) há necessidade de aprofundar as discussões sobre o pluralismo metodológico e das possibilidades e dos limites da teorização combinada como fundamento para a pesquisa do campo da política educacional; b) o aprofundamento do estudo da epistemologia e das teorias que têm sido usadas na pesquisa em educação emerge como uma tarefa relevante no contexto atual, uma vez que o referencial teórico exerce um papel fundamental na pesquisa.

PALAVRAS-CHAVE
política educacional; epistemologia; pluralismo.

LA INVESTIGACIÓN EN EL CAMPO DE LA POLÍTICA EDUCATIVA. PERSPECTIVA TEÓRICO-EPISTEMOLÓGICAS Y EL LUGAR DEL PLURALISMO

RESUMEN

Este trabajo presenta un análisis de las perspectivas teórico-epistemológicas de una muestra de 140 artículos de política educativa, de autores brasileros, publicados entre 2010 y 2012. La mayoría de los trabajos fueron clasificados en la categoría de teorización combinada, la cual remite al pluralismo metodológico. Se concluye que: a) hay necesidad de profundizar las discusiones sobre el pluralismo metodológico y de las posibilidades y límites de la teorización combinada como fundamento para la investigación del campo de la política educativa; b) la profundización del estudio de la epistemología y de las teorías que se han usado en esta investigación en educación emerge como una tarea relevante en el contexto actual, ya que el referencial teórico ejerce un papel fundamental en la investigación.

PALABRAS CLAVE
política educativa; epistemología; pluralismo.

INTRODUCTION

The objective of this paper is to analyze the theoretical and epistemological perspectives that have been used in education policy research in Brazil, from the systematic analysis of a sample of 140 papers written by Brazilian authors, published between 2010 and 2012, in seven journals: *Cadernos de Pesquisa*; *Educação & Sociedade*; *Educação e Políticas em debate* (*EPD*); *Ensaio: avaliação e políticas públicas em educação*; *Jornal de Políticas Educacionais* (*JPE*); *Revista Brasileira de Educação* (*RBE*); *Revista Brasileira de Política e Administração da Educação* (*RBPAE*).[1] In defining the corpus, papers by foreign authors and bringing comments and criticism were excluded. Thus, the papers selected refer to research of theoretical or empirical nature.[2]

The present work is part of a broader research that aims to analyze a series of aspects related to the epistemology of education policies through meta-research. The starting point for research on epistemologies of education policy is the fact that this field is constantly expanding and continually under construction. There is a substantial amount of research on education policies, but still there are few studies on the theoretical framework that have been used. Thus, the development of theoretical and epistemological studies on education policy can be considered extremely important and necessary for the continuous strengthening of this academic field.

This research is classified as a meta-research study, that is, the analysis of a set of papers that resulted from theoretical or empirical research, focusing on the analysis of the theoretical and epistemological framework that underpinned the studies and other relevant elements. Meta-research differs from literature reviews, systematic reviews, state-of-the-art and state of knowledge. From our perspective, a literature review is the survey and analysis of productions on a specific topic, being a step of a research project. It aims to identify what has been researched, to synthesize the main conclusions and to identify the existing gaps. Systematic review is a more rigorous alternative, since it seeks to identify all evidence available on a given topic, comparing them and synthesizing the results explicitly (Torgerson, 2003). State-of-the-art or state of knowledge are bibliographic research, which takes up the challenge of

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1   Three of the journals officially use the following translation: *Education & Society*; *Ensaio: assessment and public policies in education*; *Brazilian Journal of Education*.
2   For the definition of the journals to be included in the sample, we used as criteria: a) the inclusion of journals that are considered specific in the field of education policy (*EPD*; *Ensaio: avaliação e políticas públicas em educação*; *JPE* and *RBPAE*); and b) highly qualified and recognized journals in the area of Education (*Cadernos de Pesquisa*; *Educação & Sociedade* and *RBE*). We recognize that this selection has limitations. However, the intention of the research was to consider a set of education policy research that would approach the field in a broader way, avoiding to gather papers that dealt with very specific topics, such as education financing or other subjects, which may be object of specific epistemological analysis, in future research.

> […] mapping and discussing a certain academic production in different fields of knowledge, trying to identify what aspects and dimensions have been highlighted and privileged in different times and places, in what ways and under what conditions certain master's theses, doctoral dissertations, publications in journals and communications presented at annals of congresses and seminars have been produced. (Ferreira, 2002, p. 258)

On the one hand, one may consider that state of knowledge, in general, is a broader research aimed to understand how a theme has been approached over the years. On the other hand, state-of-the-art can refer to the situation of research at a given moment, for example, in the last decade. In meta-research, the researcher is interested in understanding the intricacies of the study, its theoretical basis, methodological options, the relation between theory and data, the procedures used to apply and/or generate theories, and so on. Thus, meta-research is not intended to compare results of studies or to synthesize their contributions or conclusions, as this is usually done in a literature review. There is also no intention to verify how the research on a specific theme has evolved over time, as this is done in state of knowledge. The results of a meta-research can contribute to the understanding of research in a given field, in a specific spatiotemporal context and, therefore, it can identify theoretical and epistemological tendencies, gaps, weaknesses and strengths.

SOME DATA ABOUT THE CONTEXT OF THE PAPERS OF THE SAMPLE

In the first step of the research, 636 papers published in the period from 2010 to 2012 were found in the selected journals. Next, the selection of papers on education policy was done, the ones of foreign authors, other topics, as well as 33 papers on education policy, written by Brazilian authors that constituted comments or criticisms (18.9% of the total) were excluded. The final sample comprised a total of 140 papers, 53 were theoretical research or document analysis (38%) and 87 were empirical research (62%). One important decision was the non-inclusion of papers on democratic management and education and school management. Although many of these studies are related to education policy, we consider that the epistemological analysis of such studies would be more appropriate in other research.

The papers analyzed covered a wide variety of themes, and the most recurring ones were: financing and collaboration regime (13 papers); analysis of specific programs — Educational Development Plan (PDE, in its acronym in Portuguese), Plan of Articulated Actions (PAR, in its acronym in Portuguese), National Index of Quality of Education (IDEB, in its acronym in Portuguese); University for All (PROUNI, in its acronym in Portuguese), Programme for Support to Plans for the Restructuring and Expansion of Federal Universities (REUNI, in its acronym in Portuguese) — (11 papers); higher education: expansion and regulation (10 papers), public and private (9 papers), evaluation and regulation (7 papers), National Education Plan (PNE, in its acronym in Portuguese) (7 papers), municipal edu-

cation policy (7 papers), career, remuneration and teacher appreciation (5 papers), federalism (5 papers).

With regard to methodological procedures, most empirical research adopted mixed methods (quantitative and qualitative). The most recurring procedures were: document analysis (34 papers), analysis of statistical data: microdata from Instituto Nacional de Estudos e Pesquisas Educacionais Anísio Teixeira (INEP), data from IDEB, data from performance assessments of state or municipal network students, enrolment data, salary scales (34 papers), interviews (21 papers), questionnaires (9 papers), observation (3 papers), focus group (2 papers).

The authors were university professors, graduate program in education professors or others, graduates of graduate program in education, doctoral or master students. Regarding the geographical distribution, the majority of authors were from the Southeast (45.7%) and South (25.7%). The Northeast region amounted to 17.1%, Central West 7.9% and the North region 3.6%. This reproduces, to a certain extent, the distribution of the graduate programs in education in Brazil.

Regarding the scope of the research, the majority focused on national (62 papers), state (26 papers) and local (30 papers) policies. Although six of these papers were classified as national, state or local, they established relations with the international/global context.

It is important to consider that the papers of the sample were produced in a context of expansion of education policies, investment in the educational area, and when several issues were the object of public debate, such as the PNE. The political, economic, social and cultural context of this expansion has not ceased to be characterized by weaknesses and contradictions, such as: opening of spaces for the participation of the private sector in the definition of education policies; use of public resources for the private sector; creation of managerial policies based on models of efficiency and effectiveness; definition of substantive policies with limited participation, and so on. In this scenario, education policy researchers were challenged to develop research on a wide variety of policies, with very distinguishing focuses, some of them with potentially emancipatory character and others with a managerial point of view.

THEORETICAL AND METHODOLOGICAL FRAMEWORK

This research is based on the epistemologies of education policy approach (Tello, 2012), on the concepts of combined and additive theorization (McLenann, 1996) and on the proposal of meta-research on education policy (Mainardes and Tello, 2016; Tello and Mainardes, 2012, 2015b).

We consider education policy as a theoretical and academic field. As a theoretical one, education policy has antecedents of theories and productions of political science, whose emergence can be situated in the 1940s (Stremel, 2016). Education policy, as an academic field, has been constituted, in Brazil, since the end of the 1960s, with the creation of associations (Associação Nacional de Política e Administração da Educação — ANPAE, for example, in 1961); use of the term

education policy in publications and official documents; creation of disciplines, departments, specialized journals, events, research networks, etc.[3] From our point of view, conducting research on the development of this field is essential to understand how researchers have been applying the theoretical framework and how this has been advancing in theoretical-methodological and epistemological terms. This can contribute significantly to the strengthening of education policy as a theoretical and academic field.

Tello (2012), based on Pierre Bourdieu's theory, considers that the epistemologies of education policy approach is an analytical-conceptual schema that can be used by the researcher to exercise reflexivity and epistemological vigilance, as well as to develop meta-research studies on education policy.

Epistemologies of education policy approach has three analytical components: the epistemological perspective, the epistemological positioning and the epistemethodological approach (Tello, 2012). The epistemological perspective is the theoretical one that the researcher applies in his/her investigation process (example: marxism, neo-marxism, structuralism, post-structuralism, pluralism, and so on). Epistemological positioning derives from the epistemological perspective itself or it should come from it, in a consistent and coherent investigation. It can also be understood as the political position of the researcher. Some examples are: critical, critical-radical, critical-analytical, reproductivist, neo-institutional, juridical-institutional, empiricist, neoliberal, etc.

The epistemethodological approach is the way methodological research is constructed from a certain epistemological perspective and epistemological positioning. No methodology is neutral and, for this reason, when explaining its epistemological bases, the researcher should be concerned with the epistemological vigilance in his/her research (methodology, data analysis, argumentation, conclusions, etc.), whose construction starts from the epistemological perspective and epistemological positioning. In general, the epistemethodological approach is related to the level of coherence between the theoretical framework, methodological options, analysis and conclusions. It can be analyzed in terms of the existence or not of a thread that articulates the elements of the research. It involves systematic reading and textual configuration analysis.

The concepts of combined and additive theorization (McLenann, 1996) were also relevant in the analysis of the papers. McLenann (1996) explains that combined explanatory strategies are legitimate and perhaps promising. In this sense, combined theorization is an effort to articulate theories or concepts derived from different theories, with the objective of composing a consistent theoretical framework to support a given analysis. Such an effort demands making theoretical choices and justifying them, which implies an exercise of reflexivity and epistemological vigilance. The notion of additive theorization means a kind of random adoption of theories,

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3   Regarding the constitution of education policy as an academic field, see Mainardes (2013), Stremel (2016) and Stremel and Mainardes (2016).

concepts, ideas of different theories and epistemological perspectives, resulting in a set of ideas and concepts without coherence, unity and theoretical articulation. The result of simply adding and overlapping ideas from different authors results in a failed attempt to define a theoretical framework, which can be considered fragile, disjointed and epistemologically inconsistent.

Meta-research refers to the process of taking a set of texts as an object of reflection and analysis. In the case of meta-research based on the approach of education policy epistemologies, we seek to identify how researchers work with the epistemological issues, theories or concepts that underlie their research and how they are presented in their reports. Thus, we seek to identify a series of elements and characteristics, such as: epistemological perspective, epistemological positioning, epistemethodological approach, type of research (theoretical, empirical, comments or criticism), theoretical frameworks (employed concepts), the levels of approach and abstraction (description, analysis and understanding) and other aspects related to the use of epistemological theories and perspectives in education policy research (Mainardes, 2017; Mainardes and Tello, 2016; Tello and Mainardes, 2012, 2015b).

In the methodological sense, this research was based on the selection of education policy papers written by Brazilian authors published between 2010 and 2012, in 7 journals already mentioned. From the systematic reading, we sought to identify in each paper the epistemological perspective, the epistemological positioning, the level of internal coherence (epistemethodology), theoretical frameworks, abstraction level, argumentation and the scope of research (local, national, global).

In this paper, we explore data related to the theoretical perspectives of the papers in the sample. Given that the combined theory proved to be the theoretical perspective employed in most works, we sought to highlight the role of this perspective and some of its limits.

THEORETICAL AND EPISTEMOLOGICAL PERSPECTIVES IN RESEARCH IN THE FIELD OF EDUCATION POLICY

The main objective of this research was to analyze the papers from an epistemological point of view, exploring how researchers have been dealing with theories, as well as the articulation between theory, data and analysis. Ball (2006, 2011) advocates the urgent need for theory in research in education and in the education of researchers. To the author, theory plays a central role in making epistemological decisions. Theory contributes to ensure conceptual robustness as well as to provide a method for reflexivity and for understanding the social conditions of knowledge production. He also suggests the importance of "violence" that theory possesses as a reflective tool in research practice, its role in defying conservative and closed orthodoxies, parsimony, and simplicity. The role of theory is to maintain some sense of stubbornness and complexity of the social.

The 140 papers of the sample were classified into 16 categories (Table 1). It is important to note that any typology or classification is arbitrary and related to specific purposes, thus the same objects can be classified in different ways.[4]

With regard to the explication of the epistemological perspective that underlies the analysis, it was verified that only five papers of the sample (3.5%) made it explicit: Ferretti (2011) mentions the marxian perspective; Oliveira *et al.* (2010) mentions the critical-dialectic approach; Masson (2012) and Saldanha and Oliveira (2012) mentions the historical-dialectical materialist conception;

Table 1 – Theoretical perspectives of the sample (2010-2012)

Categories	n	%
Combined theorization	92	65.8
Historical and dialectical materialism	10	7.1
No evidence of theoretical foundation (absence of theorization)	8	5.8
Additive theorization	7	5.0
Neo-institutional focus (normative institutionalism, historical institutionalism, network institutionalism)	5	3.6
Historical – sociological focus	4	2.9
Bourdieu's theory	3	2.1
Historical-philosophical focus	2	1.4
Legal-institutional focus	2	1.4
Foucault's theory	1	0.7
Functionalist focus	1	0.7
Culturalist focus	1	0.7
Social representation theory	1	0.7
Critical theory	1	0.7
Critical discourse analysis	1	0.7
Theory of discourse (Laclau and Mouffe)	1	0.7
Total	140	100

Source: Author database.
Author's elaboration.

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4 Thiry-Cherques (2006, p. 29) explains that "Although heir to the philosophy of sciences, Bourdieu refuses to apply classificatory systems to the objects that he investigates (Bourdieu, 1992a, p. 184). He understands that every typology crystallizes a situation, that is, it tends to be arbitrary, as it discards the types that do not fit and the cases that are at the border, the cases that are not clearly distinguishable. He owes to Bachelard (1984) the idea that thought operates as a tweezer movement, which uncovers, integrates and overcomes the limitations of theories into an increasingly comprehensive conceptual composition".

Souza, A. L. L. (2012) mentions the historical-philosophical perspective. In some cases, authors from other epistemological perspectives are used in the analysis (*e.g.* Ferretti, 2011; Oliveira *et al.*, 2010). In the other three papers, the theoretical perspective was made explicit: Machado and Aniceto (2010) mention the theory of social representations; Pereira and Velloso (2012) mention the discourse theory (Laclau and Mouffe); and Barreto (2010) mentions the critical discourse analysis. In the other 132, the theoretical and epistemological perspectives were deduced from the reading and analysis of the papers, since there was no such explanation by the authors themselves.

Based on the concepts of reflexivity and epistemological vigilance[5] we have considered that the explication of the theoretical and epistemological perspective can increase the consistency of the research, the coherence between theory and analysis of data and conclusions and rigor in the research.[6] However, the explication alone does not guarantee that the elements of the research are aligned and coherent and that the researcher effectively operates satisfactorily with the adopted framework. In the cases of the use of combined theorization, the presentation of justifications and the role of theories or concepts used in the research can be an essential aspect. Such an explication evidences the conscious and reflexive use of epistemological theory and vigilance.

With regard to the epistemological positioning of the sample, it was possible to define the following categories: a) analytical (78 papers), critical-analytical (29 papers), empiricist (20 papers), critical-normative (9 papers), critical-radical (3 papers) and culturalist (1 paper). Papers classified as empiricist epistemological

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5   Lopes (2007) explains that the concept of epistemological vigilance is based on Bachelard's notion of intellectual vigilance. "Intellectual vigilance, properly epistemological, is opposed to the simple intellectual vigilance. Simple intellectual vigilance is what awaits a definite fact, the location of a characterized fact. It is the consciousness that a subject has of the object: consciousness so clear that subject and object are clarified at the same time. In this sense, it is the attitude of an empiricist knowing subject. Epistemological vigilance, or intellectual vigilance, or surveillance of the vigilance is the act of monitoring not only the application of the method, but also the method itself. It requires that the method is put to test, but also that risks are taken, in the experience, the rational certainties. It also requires the analysis of obstacles that impede the development of scientific knowledge and masks the ruptures of knowledge. With this, it is vigilance that aims to destroy the absolute of method, reason and facts" (Bachelard, 1977 *apud* Lopes, 2007). It is also a concept employed by Bourdieu (Bourdieu, Chamboredon and Passeron, 2007).
6   There is no consensus on the validity and importance of the epistemological perspective explication by the researcher. Bracken (2010) argues that it is important for the researcher to be aware of the ontology and epistemology underlying his/her research, as well as the researcher's need to ensure that his/her own ontological insights, epistemological instances, and data collection and interpretation methods are closely aligned. Anastas (2004) and Marshall and Rossman (2006) argue for the importance of explaining the theoretical-epistemological foundations of research.

positioning are the ones that present statistical data or research data, but with little analysis and little or no theorization.[7]

Regarding the levels of approach/abstraction, it was possible to develop three basic categories: description, analysis and comprehension (Mainardes and Tello, 2016). In the case of the sample, the works were classified as follows: level of analysis: 115 works; level of description: 21 papers; and level of understanding: 4 papers. The predominantly descriptive studies are those that present a set of ideas (in papers of theoretical or bibliographic nature) or empirical data, with little analysis of the ideas or data presented.

In predominantly analytical studies, data or ideas are worked out, categorized, compared. One of the important features of analytical studies is more integration between theory and data. Theories are not merely applied, since the effort of analysis results in the generation of concepts, categories, typologies, empirical generalizations. Due to the more systematic use of a theoretical framework and a more comprehensive and systematic analysis process, findings and conclusions of the research become more universal, with a higher level of generality, making it possible to be extended or applied to other contexts.

The level of comprehension is the highest and most advanced level of abstraction. This level may contain some level of description and a significant set of analyses, which are subsumed by comprehension. They are studies that present a double dimension of the research process: to explain and understand (the interpretative and explanatory character). They are studies that seek to approach the theme (theoretical or empirical) in a more totalizing way, exploring in depth the relationships and determinations involved in the policy investigated or in the issue being discussed. In general, they are studies that present greater richness and depth in the analyses, and may even serve as a basis for other research. In these studies, we can observe a strong and coherent articulation between the epistemological perspective, epistemological positioning and epistemethodological approach, even when the epistemological perspective is not presented explicitly.

When applying the principles of grounded theory (Glaser and Strauss, 1967), the studies of comprehension level present an essential aspect in the process of knowledge production: the generation of theory. The generation of theory can be identified through the elaboration of concepts, categories, typologies, explanations

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7 This set of papers refers to the metaphor of the "gigantic white elephant, full of data, but without ideas, without substance, with useless knowledge to approach the complexity of the world" (Cansino, 2007). Cansino (2007) presents comments from Giovanni Sartori's paper (2004). In his paper, Sartori, considered one of the most important political scientists, says that political science has lost its way and walks with feet of clay, and by rigorously embracing quantitative and logical-deductive methods to demonstrate increasingly irrelevant hypotheses to understand the political process, ends up releasing itself from thought and reflection.

or even sensitizing concepts,[8] which, due to their level of generality and coherence, represent advances in the production of knowledge in the field.

Another aspect of interest was the level of research coverage. Of the 128 papers that allowed the identification of the scope of the research (theoretical or empirical),[9] 6 had an international-global range; 62 national; 4 regional; 26 state coverage; and 30 local range.

This research confirmed the possibility of identifying the basic components of the epistemologies of education policy approach. It could be observed that there is a close relation between theoretical perspectives, epistemological positions and levels of abstraction. For example, papers whose authors used additive theorization or the absence of a theoretical framework ended up expressing an empiricist epistemological position and a level of descriptive abstraction. Another example is the strong relation between a critical-analytical or critical-radical epistemological position and the level of abstraction of understanding.

Meta-research on education policy and the classifications and categories that have been developed (combined and additive theorization, levels of description, analysis and understanding; critical, critical-radical, analytical, empiricist epistemological positioning and so on) are relevant for the following reasons:

- they allow a more in-depth understanding of how the theoretical and epistemological perspectives have been employed in education policy research and its implications for strengthening research in this field;
- they offer a "language of description" to refer to the field research;
- they allow to identify with greater clarity the potential tensions and challenges of education policy research, as well as to reflect on strategies for the continuous strengthening of the field.

Most papers (65.8%) fell into the category of combined theorization, indicating a tendency of the authors of the field to employ ideas (or concepts, categories, contributions) from different theoretical perspectives or authors. The use of historical and dialectical materialism (7.1%), strategies of additive theorization (5%) and other theoretical perspectives with lower incidence were also identified.

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8 The notion of sensitizing concepts (sensitizing concepts, provisional) was initially used by the American sociologist Herbert Blumer (1954), the founder of symbolic interactionism. He created this concept to contrast what he calls "definitive concepts" (culture, institutions, social structure, personality, etc.). Sensitizing concepts do not involve fixed and specific procedures to identify a set of phenomena, but instead they offer a sense of reference and orientation in approaching empirical instances. Thus, while definitive concepts offer prescriptions of what to see, sensitizing concepts only suggest directions for looking (Blumer, 1954). It is a relevant concept in grounded theory, as "the sociologist should be theoretically sensitive enough that he can conceptualize and formulate a theory from the data" (Glaser and Strauss, 1967, p. 46). Mainardes and Tello (2016) indicated examples of sensitizing concepts in education policy research.

9 Some papers of theoretical nature did not allow classification with regard to comprehensiveness.

An important aspect to be highlighted is the existence of papers characterized by the absence of theoretical foundation (5.8%) and those that used the additive theorization (5%), which means the use of authors, ideas and concepts from different theoretical and epistemological perspectives, which do not configure a consistent and articulated theoretical framework.

Considering the significant number of papers classified in the category of combined theorization, we consider its analysis relevant.

COMBINED THEORIZATION AND LIMITS OF THEORETICAL AND METHODOLOGICAL PLURALISM

The strategy of combined theorization was identified in 92 of the 140 papers (65.8%). The main feature of this category is the use of ideas or concepts from more than one author or theory, which configures a coherent or minimally satisfactory theoretical framework.

In most of the papers of the sample, we observed that the combined theorization resulted in a consistent and coherent framework, providing theoretical elements for a satisfactory analysis (such as Adrião and Pinheiro, 2012; Augusto and Oliveira, 2011; Bruel and Bartholo, 2012; Campos, 2012; Chaves, 2010; Costa and Koslinski, 2011; Davis *et al.*, 2011; Freitas, 2012; Morais, 2012; Santos, 2010; Souza, A. R., 2012; Susin and Peroni, 2011).

In addition, two aspects were relevant in the composition of the theoretical framework: the use of classical authors and contemporary international references. The use of classics such as Weber, Bourdieu, Foucault (Amaral and Oliveira, 2011; Martins and Lotta, 2010; Souza, A. R., 2012) was a relevant strategy for the analytical deepening and broadening of the argumentation. The use of foreign references, in some papers, provided a broader, more consistent and differentiated analysis of the thematic (Augusto and Oliveira, 2011; Bruel and Bartholo, 2012; Davis *et al.*, 2011).

In some cases, the use of contemporary authors or those who research the same theme has made the theoretical framework of research relatively fragile, with consequences for analysis and discussion. It is important to state that the dialogue along with the research of the area is fundamental. However, such dialogue seems more adequate at the literature review. In some cases, the authors who research the same theme are used as a kind of theoretical framework. Although some of these works may actually serve as a basis for other studies, a careful analysis is necessary to identify the works that effectively have the potential for this. Paraphrasing Ball (2006), we can conclude that some researchers are satisfied with what is available (in terms of theories and data), instead of giving more significance to a more detailed and in-depth analysis.

The strong presence of the combined theorization strategy indicates that the pluralistic epistemological perspective has been widely employed in the field of education policy research. Despite that, there are still few publications that present discussions about theoretical and methodological pluralism in education policy research.[10]

10 Regarding the theoretical and political dimensions of pluralism, see Coutinho (1991). Regarding pluralism in education policy research, see Mainardes, Ferreira and Tello (2011); Mainardes and Tello (2016); Tello and Mainardes (2015a).

To Coutinho (1991), pluralism involves two basic dimensions: pluralism as a social and political phenomenon and pluralism in the construction of knowledge. The author also indicates that latter is more complex. To him, in the field of social thought, there is not only science, but also the world of values, a set of worldviews. In this field, there cannot be a truth of a scientific kind, because what the various social actors share intersubjectively (when consensus is obtained) becomes objectivity. For example, researchers in the field of education policy use different theoretical and epistemological perspectives.

Despite that, there are hegemonic values that can be shared by researchers, such as: the defense of democracy, of real democratization, of the right of all to education, of social justice, of equality, the need for changes in the broader economic and social context (not just in the education sector), the struggle for non-racist, non-selective, non-sexist education, among others important values. To Coutinho (1991, p. 14), hegemony refers to the "formation of a collective will, a set of values that moves a collective subject and becomes, through their action, an objective phenomenon of social reality". In general, these shared values can be identified in the epistemological positioning of the researcher, sometimes presented implicitly or explicitly in terms of assumptions and values that guide the analysis. Some authors use pluralism with the hegemony of critical theories or at least of theories or authors who defend shared hegemonic values (democracy, democratization, equality, social justice, etc.).

In conceptual terms, it is important to distinguish pluralism from eclecticism. What we call here pluralism, as an epistemological perspective, is the conscious and reflexive use of concepts and ideas of different theories, which are articulated to compose a theoretical framework for the research. Thus, it is not a mere juxtaposition of theories, or a random and non-conscious selection of concepts and ideas from different theories, as this would configure the strategy of "additive theorization" (or eclecticism). Coutinho (1991, p. 13) explains that "in the field of natural science, pluralism cannot imply eclecticism or relativism".[11] The articulation of ideas of different theories implies justification of such choices, to present of itself, reflections in relation to the theoretical framework constructed. Eclecticism, however, means the juxtaposition of theories or ideas in a more or less random way, without much rigor or any evidence of the recognition of the epistemological differences that underlie such ideas or theories. In general, the authors who use eclecticism do not present reflections or justifications of the theoretical choices.

An important starting point for understanding the pluralistic epistemological perspective is to consider the point of view of those who defend it, as well as those who criticize it. Authors such as Saunders (2007) and Ball (interview to Avelar, 2016), for example, explain that a single theory would hardly be able to

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11 To Coutinho (1991, p. 14), "Pluralism, in the field of natural or social science, is not then synonymous with eclecticism. It is synonymous with openness to the different, respect for the position of others, considering that this position, when warning us of our mistakes and limits, and when providing suggestions, is necessary to the very development of our position and, in general, of science".

provide all the elements necessary for analysis and that it is possible to articulate different theories.

According to Ball, "we cannot interpret the world, create meaning about the world, using a theory or epistemological position, because the world is persistently more complex and difficult than what can be understood by the simple use of a position, adopting a position" (Avelar, 2016, p. 4). Saunders (2007) explains that theoretical dependence (the recognition that all research requires a theory) does not imply theoretical determination. In other words, there is no reason to suggest that different theoretical perspectives cannot be used in common areas of conceptualization or criteria of empirical evidence (Saunders, 2007). In the discussions about pluralism, there are points of approximation in theories and not only aspects of incompatibility (Mainardes and Marcondes, 2009). Despite that, the combination of epistemological perspectives, theories, concepts and ideas are complex and demands a high level of reflexivity, some justification of the combinations made, and an awareness of the epistemological perspective that is based on theories, ideas or concepts that are being combined. It is not, therefore, about the random and little conscious choice of such theories, ideas or concepts. Theoretical composition needs, above all else, to "make sense" as a theoretical framework for the analysis and development of conclusions.

McLennan (1995), Tonet (n.d.) and Mészáros (2004) present criticisms of pluralism. To McLennan (1995), pluralism has different facets, such as: methodological pluralism, socio cultural pluralism, political pluralism. To the author, pluralism indicates, among other things:

- a convenient discouragement and relativistic acceptance that there is a set of cultural values;
- opposition to forms of cultural imperialism;
- recognition that methodological diversity is fruitful;
- it considers that there are different ways of knowing and being;
- creativity and openness to theory;
- involvement in a set of social interests and interest groups in the modern political scenario;
- the affirmation of democracy as an end in itself;
- attention to the complexities of political loyalty;
- sense that social and political identities are chosen rather than inherited; and
- consecration of the principle of "equal but different".

McLennan (1995) also indicates the existence of radical or moderate theoretical pluralism, as well as pluralism of "right" and "left". To him, a researcher can be pluralistic in terms of ontology, epistemology, methodology, social theory, morality, politics, culture, or pluralist in only two or three of these domains. McLennan (1995) points to the following criticisms of pluralism:

- pluralism can be seen as a key concept in the social sciences. As a modal concept, pluralism is an indispensable reference in scientific and social debates. However, by itself, it does not produce clear and lasting solutions to the old issues and analytical and political concerns;

- as an attitude of life and political vision, it can be understood as too tolerant, pseudo-tolerant, ostensibly humanistic and a kind of intellectually eclectic person, a type of person who has no clear opinions about anything and who does not question or does not want changes in society; hesitant when needed to employ sociological knowledge or political science in its full critical potential.

Mészáros (2004) criticizes pluralism considering it as a legitimator of the dominant ideology. He also criticizes the reformist discourse that tries to divert attention from the systemic determinations to more or less random discussions about specific effects (Mészáros, 2005). To Tonet (n.d.), methodological pluralism, despite being anti-dogmatic, is still a form of relativism and eclecticism, since its foundation lies in subjectivity and not in objectivity. According to him, "in its present concrete form, it represents an entirely misleading and anti-scientific solution" (Tonet, n.d., p. 14).

CONCLUSIONS

In this work, we presented the theoretical perspectives identified in the papers of the sample, with special reference to the strategy of the combined theorization. We argued that such a strategy configures the use of pluralist epistemology in policy analysis. We indicate that a pluralist epistemological perspective is not a mere juxtaposition of theories, concepts or contributions of authors. Pluralism involves the conscious and reflexive choice of ideas from different authors, theories or epistemological perspectives, as well as the presentation of reflections and justifications for the framework constructed from different epistemological perspectives. The fundamental aspect of theoretical and methodological pluralism is that the theoretical framework constructed needs to make sense for the policy or theme under investigation and result in a consistent and coherent formulation.

From the analysis of the papers of the sample, we present the following conclusions:

- In view of the strong tendency to use the strategy of combined theorization, it is necessary to deepen the discussions about pluralism (methodological and epistemological) and the possibilities and limits of this strategy as a basis for research in the field of education policy. Due to the growing complexity of the current reality (political, economic, social, cultural), we may question: Can the combined theorization be considered a strategy that allows the creation of more comprehensive and more flexible analytical models for policy analysis? Or is it a relativistic perspective for policy analysis? What are its possibilities and limits? What is the relevance of distinguishing between the use of theoretical and epistemological perspectives and the world of values and of the set of worldviews — that can be shaped by shared values (democracy, democratization, right to education, social justice, equality, etc.)?

- Since combined theorization has been widely used in the papers of the sample, it is important to note that there are distinct levels of combined theorization, some of which are more appropriate and coherent than others. This strategy demands a rigorous analysis of the concepts (categories, ideas, contributions) that are being combined, which demand justifications and explanations about the theoretical framework built.[12]
- The deepening of the study of the epistemology and theories that have been used in the research emerges as a highly necessary and relevant task in the current context both in the practice of research and in the process of education of researchers.
- The research and discussions on theoretical and epistemological framework and the epistemological studies of education policy contribute to the strengthening of education policy as a theoretical and academic field.
- An issue that persists is related to the role and importance of the explication of the epistemological or theoretical perspectives that underlie the research. The explication of the theoretical and epistemological framework can raise the level of rigor in the research. In the case of authors who articulate ideas of different authors and theories, it is essential to highlight the role of each one in the theoretical framework of the research.
- The concepts of reflexivity and epistemological vigilance (Bachelard, 1977; Bourdieu, Chamboredon and Passeron, 2007) emerge as fundamental concepts both for the work of each researcher and in the meta-research on education policy.

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12 In this respect, Tonet (n.d., p. 2) says that "what is meant by methodological pluralism? Sometimes it is understood as eclecticism, that is, the freedom to take ideas from various authors and to articulate them according to the convenience of the thinker. This is usually done without the care of rigorously checking the compatibility of different ideas and paradigms, giving rise to a patchwork, at most, cleverly woven. It is good to note that there is eclecticism from below and of a very high level".

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