



## NOTES ON EVALUATION THEORY

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**Key words:** *evaluation, attitude;  
graduation; engagement;  
meaning; discourse  
analysis, conceptual, strategy,  
worldview.*

Evaluation theory is an influential framework within systemic functional linguistics that accounts for how evaluation, stance, and interpersonal positioning are realized in discourse. Developed primarily by Martin and White, the theory expands the interpersonal metafunction by offering a detailed model of how speakers and writers express attitudes, modulate the intensity of those attitudes, and negotiate dialogic relationships with actual or potential interlocutors. Rather than viewing evaluation as merely lexical or expressive, Evaluation theory treats it as a structured semantic system that plays a central role in meaning-making.

The framework consists of three interrelated subsystems: attitude, graduation, and engagement. Attitude encompasses emotional responses (affect), evaluations of human behavior in relation to social norms (judgment), and the valuation of objects, events, and states of affairs (appreciation). Graduation accounts for variations in intensity and category boundaries, allowing meanings to be strengthened, weakened, sharpened, or softened. Engagement focuses on how utterances position the authorial voice with respect to other perspectives, ranging from dialogically expansive formulations that acknowledge alternative viewpoints to contractive ones that limit dialogic space.

A central insight of Evaluation theory is that evaluative meaning is contextually constructed rather than inherent in individual words. Evaluation may be explicitly inscribed through attitudinal lexis or implicitly invoked through implication and association, relying on shared cultural assumptions. Furthermore, all utterances are understood as inherently stanced, even when they appear neutral or factual.

Evaluation theory has proven particularly valuable in discourse analysis, enabling nuanced investigations of ideology, identity construction, persuasion, and power relations across genres and languages. Its systematic approach offers researchers a robust tool for comparing texts and uncovering the interpersonal dynamics that shape communication.

## НОТАТКИ ЩОДО ТЕОРІЇ ОЦІНЮВАННЯ

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### Ключові слова:

оцінювання, ставлення;  
випуск; залученість;  
значення; дискурс-аналіз,  
концептуальний, стратегія,  
картина світу.

Теорія оцінювання є одним із ключових підходів у межах системно-функціональної лінгвістики, що пояснює, яким чином у дискурсі реалізуються оцінка, позиція мовця та міжособистісна взаємодія. Розроблена Дж. Мартіном і П. Вайтом, ця теорія розширює уявлення про міжособистісну метафункцію мови, розглядаючи оцінювання як системний і структурований компонент значення, а не як суто стилістичний або емоційний елемент.

У межах теорії виділяють три взаємопов'язані підсистеми: ставлення, градацію та залучення. Ставлення охоплює емоційні реакції (афект), оцінку людської поведінки з погляду соціальних і моральних норм (судження), а також надання цінності об'єктам, процесам і станам справ (оцінювання/ appreciation). Градація відповідає за варіювання інтенсивності та чіткості значення, дозволяючи посилювати або пом'якшувати оцінку. Залучення описує способи, за допомогою яких мовець або автор співвідносить власну позицію з іншими можливими поглядами, відкриваючи або обмежуючи діалогічний простір.

Важливим положенням теорії оцінювання є теза про контекстуальну зумовленість оцінних значень. Окремі слова не мають фіксованої оцінної семантики, оскільки вона формується в конкретному дискурсивному оточенні. Оцінка може бути виражена як експліцитно, так і імпліцитно – через натяк, асоціації та фонові знання адресата. Теорія оцінювання також виходить з того, що будь-яке висловлювання є формою позиціонування. Завдяки своїй аналітичній гнучкості теорія оцінювання широко застосовується в дослідженнях медійного, політичного, академічного та міжкультурного дискурсу, сприяючи глибшому розумінню того, як мова конструє цінності, ідентичності та соціальні відносини.

**Problem statement.** The evaluation framework, introduced by Martin, White, and other linguists during the 1990s and early 2000s, offers a systematic approach to examining how texts express evaluation [Iedema, Feez, & White, 1993; Martin & White, 2005]. It focuses on the ways in which language conveys positive or negative judgments, modulates the strength or explicitness of such evaluations, and positions speakers or writers dialogically in relation to earlier voices or anticipated responses.

These meaning-making resources, which are cognitive in nature, are collectively referred to as the “language of evaluation,” as they reveal the author’s personal and attitudinal involvement in the text and discourse. Through appraisal, writers and speakers adopt stances toward both concepts – such as events, entities, or states of affairs – and metaphenomena, namely propositions about those phenomena.

Initial research within the appraisal tradition concentrated primarily on English and emphasized that the evaluative categories identified for English should not automatically be assumed to apply to other languages [Thomson, & White, 2008]. Subsequent studies, however, have extended the framework’s descriptive principles to a wide range of languages and have employed them in cross-linguistic comparisons of evaluative meaning.

The evaluation framework is grounded in Halliday’s systemic functional linguistics [Halliday, 1994], which conceptualizes meaning as operating through three metafunctions: ideational, interpersonal, and textual. Ideational meaning concerns the representation of experience; interpersonal meaning involves the enactment of social relations, identities, and roles; and textual meaning organizes ideational and interpersonal meanings into coherent discourse appropriate to specific contexts.

The appraisal framework was developed in an effort to distinguish among the different types of evaluation, and provide analytical tools for the study of evaluative language in texts. Appraisal resources are central to the interpersonal metafunction, as they enable speakers and writers to express feelings, preferences, and viewpoints with varying degrees of intensity and directness, to present propositions as more or less contestable, and to align or distance themselves from prevailing value positions in a given communicative situation.

Within Martin's model of the interpersonal metafunction, appraisal operates alongside other interpersonal systems. These include speech-function resources – such as asserting, questioning, commanding, or advising – and resources that manage degrees of interpersonal involvement, for example through informal vocabulary, technical language, or markers of social intimacy.

A comprehensive analysis of interpersonal meaning in a text therefore requires attention to speech functions, involvement strategies, and evaluative positioning as articulated through appraisal. Under the label “evaluation” we will examine a fruitful area of research that has studied evaluation and opinion within a functional framework.

**The aim of this article** is to study functions of evaluation which play the chief role in constructing different types of utterances, texts and discourses.

**The object of the research** is the category of evaluation and its manifestations.

**The subject of the research.** Evaluation, as a cover term for many approaches, has long been the object of interest in linguistics. In this article we made an attempt to explore how in evaluation theory, attitude refers to the subsystem of meanings through which audiences are guided to adopt favorable or unfavorable orientations toward experiential phenomena or propositions about them. The framework provides a detailed taxonomy of attitudinal meanings that takes into account the basis of evaluation, the nature of the evaluated target, its social implications, and whether the attitude is expressed overtly or implicitly. This taxonomy allows analysts to identify what is at stake when one type of attitudinal meaning is chosen over another within a particular context.

Attitudinal meanings are divided into three broad categories. Affect concerns emotional responses and feelings; judgment involves evaluations of human behavior or character with reference to social, ethical, or moral norms; and appreciation relates to the valuation of objects, processes, texts, or states of affairs in terms of aesthetics, social significance, or potential benefit or harm.

Each of these categories is further differentiated into more specific subtypes. For instance, judgment distinguishes between evaluations linked to moral

or legal norms (social sanction) and those associated with social esteem, such as competence, normality, or psychological disposition. These three major systems of evaluative meaning play very important role in the formation of the conceptual and language worldview.

### **Discussion.**

#### 1. Inscribed and Invoked Attitude

The term stance is quite close to the use of evaluative language or opinion. Stance detection may be seen as a textual entailment task, because the stance may have to be inferred from what is present in the text. It can show explicit or implicit nature of evaluation.

Evaluation aspects of language allow us to convey feelings, assessments of people, situations and objects, and to share and contrast those opinions with other speakers. The appraisal framework also differentiates between attitudes that are explicitly stated through evaluative lexis and those that are implied through contextual cues, a process referred to as attitudinal invocation [Martin, & White, 2005].

In the latter case, no overtly evaluative terms are used; instead, readers infer evaluation based on background knowledge and shared expectations. Importantly, evaluation theory emphasizes that individual lexical items do not carry fixed evaluative meanings across all contexts.

Evaluation can help identifying how much the writer/speaker is involved, and how much estimation is being displayed. It is useful to measure the “volume” of a text or discourse. Rather, evaluative significance emerges from particular lexical combinations and contextual configurations, allowing the same word to take on different attitudinal values in different settings.

It must be noted, although ‘stance’ and ‘evaluation’ are conceptually related constructs, the two are dramatically different in their linguistic correlates. In summary, ‘grammatical stance’ refers to the use of a finite set of lexico-grammatical devices that explicitly express attitudes and epistemic assessments, while ‘evaluation’ refers to any stretch of discourse that can be interpreted as conveying an (implicit) attitude or epistemic appraisal.

#### 2. Graduation: Intensity and Category Boundaries

Evaluation has three major functions:

- to express the speaker's or writer's opinion.

- to construct and maintain relations between the speaker/writer and hearer/reader.

- to organize the discourse.

These functions are connected with the notion of meaning.

Variation in interpersonal meaning also involves the degree of authorial investment in what is being said. The appraisal framework accounts for this through the system of graduation, which includes

force, referring to the scaling of intensity or quantity, and focus, which concerns the sharpening or softening of category boundaries.

These effects may be realized either through single lexical items in which evaluation and intensity are fused or through separate modifiers that adjust the strength or precision of a proposition.

The system of engagement addresses how speakers and writers position themselves with respect to the propositions they advance and to alternative viewpoints. Through resources such as modality, evidentiality, attribution, and metadiscursive markers, authors can present propositions as highly contested or broadly accepted, and can signal stronger or weaker personal commitment.

Based on the notions of dialogism, evaluation theory interprets these meanings not primarily as indicators of truth value or certainty, but as strategies for negotiating the presence of other voices and perspectives in discourse.

From this perspective, some formulations function dialogically to restrict alternative viewpoints by presenting propositions as authoritative or indisputable, while others expand dialogic space by acknowledging subjectivity or attributing claims to external sources.

Crucially, appraisal theory holds that all utterances involve stance-taking. Even apparently neutral, categorical statements position the speaker or writer by treating the proposition as unproblematic within the current communicative context.

Conclusion. The evaluation framework offers a structured account of the relationships among estimative and dialogic meaning-making options and clari-

fies what is at stake when particular choices are made. By mapping these “valeur” relations, the framework enables detailed analyses of individual texts as well as systematic comparisons across texts, genres, and registers. As a result, it provides valuable insights into how language constructs identities, encodes value systems, and manages relations of solidarity and power in social interaction.

This publication is created within the Erasmus+ Jean Monnet Module Project EUROPEACE ("Peace and Solution Journalism for European Integration of Ukraine during War and Post-war Times") funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

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Дата першого надходження статті до видання: 18.01.2026

Дата прийняття статті до друку після рецензування: 23.02.2026

Дата публікації (оприлюднення) статті: 10.04.2026