



# The quote or paraphrase conundrum: Towards a unified theoretical and practical framework

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## Abstract

In this paper, I examine the often-overlooked theoretical, rhetorical, and referential dimensions of quoting and paraphrasing in scholarly writing, beyond their reductive treatment as mere technical, stylistic, and mechanical practices for satisfying ethical obligations. I discuss the flawed and sound justifications for quoting or paraphrasing, highlighting the educational, rhetorical, ethical, ideological, and persuasive consequences of the choice. I draw on several fragmented theoretical positions to demonstrate how the seemingly technical decision to quote or paraphrase is a cognitive, rhetorical, context- and genre-sensitive decision with significant implications for the writer's engagement with authorial voice in bolstering their own arguments. I challenge writing teachers to go beyond the rule-based pedagogy of quoting and paraphrasing, to enable students to construct knowledge, take a stance, and engage in scholarly discourse. In the absence of a targeted theoretical framework for quote-paraphrase practices, I propose a five-level continuum metaphor-based theoretical framework, and a quote-paraphrase decision checklist as a practical heuristic to aid writers in strategic decisions about source integration informed by their rhetorical goals. I recommend a more thoughtful, deliberate, and principled approach to integrating sources in scholarly writing that transcends the traditional and technical conception of quoting and paraphrasing, in favour of a more empowering approach.

**Keywords:** authorial voice, paraphrasing, quoting, scholarly writing, source integration

## Introduction

Sun (2024, p. 25) posited that “[a]cademic writing in nature is built on the interplay between the writer’s own voice and the voices of others.” However, in scholarly writing, quoting and paraphrasing are normally considered basic mechanical citation formats actuated by a desire to avoid plagiarism, with the writer oblivious to their significant rhetorical and ideological implications. The quote or paraphrase decision goes beyond mere technicalities to how writers interact with knowledge, establish their stance in the discourse, and navigate authorial voice. In this paper, I take a cue from Lee and colleagues’ (2018) call for studies to zoom in to sub-skills related to authorial source integration in academic writing, and reconceptualise the role

of quotes and paraphrases in conventional scholarly discourse. Sibanda (2014) underscored the universality of conventions governing academic writing and scholarship and warned that “[t]he celebration of diversity as fundamental to communicative practices would be problematic if it was extended to relativism of conventions governing academic writing” (p. 1).

By its nature, academic writing requires largely the incorporation of an external voice to bolster one’s own. Sibanda (2020, p. 219) considered source citation as “. . . one of the hallmarks of sound scholarship in academic writing.” Authorial voice is indispensable to a scholarly text since it lends credence, support, context, and depth to the writer’s arguments, and positions the argument(s) in the broader academic discourse of the field. Conversely, inappropriate source use “. . . impedes rigorous knowledge building and authorial identity construction. . .” (Du, 2019, p. 54). Without a proper review of relevant authors’ views, writers can hardly establish the gaps in scholarship they seek to bridge. In this paper, I use “author” to designate the external voice from a credible source, and “writer” to refer to the scholar writing the text. Authorial voice is imported into scholarly discourse through direct quotes, paraphrases, and summaries, with quotes and paraphrases generally employed more than summaries (Dahlen, et al. 2024). However, scholars (Cumming et al., 2016; Ramoroka, 2014; Sun, 2024) have confirmed from studies on expert and novice writers, that quotes and paraphrases represent a major difficulty.

I define conundrum as a complex and puzzling challenge requiring the conscious deployment of mental reserves. To quote or to paraphrase requires a thoughtful decision that should not be an arbitrary one taken on the writer’s whims or discretion nor based on superficial criteria like achieving a supposedly right numerical balance between quotes and paraphrases in the scholarly text. Whether to use a direct quote or a paraphrase has implications for appropriateness and effectiveness of source use and for navigating voice, authority, clarity, originality, ownership, and credibility. Such navigation “. . .needs a whole set of rhetorical, linguistic and critical thinking skills” (Du, 2019, p. 54) if it is to enhance the quality of the writer’s text. That explains why Sibanda (2020) aptly warned against the fallacy that “no plagiarism equals appropriate use of sources” (p. 220). Expert engagement with authorial voice is crucial.

## **AI, authorial voice, and the politics of attribution**

In the contemporary context of generative artificial intelligence (AI), issues related to authorial voice and intellectual attribution are more pressing and they challenge the conventional boundaries between and among quotation, paraphrasing, and authorial synthesis. If academic writing is understood as a dialogic engagement with other voices in a way that recontextualizes or reconceptualizes them (Sibanda, 2020), then AI represents a new form of authorship despite being algorithmically produced. The politics of quotation and paraphrasing are thus extended beyond human intertextuality to encompass the technological mediation of knowledge production itself.

## Focus of this paper

In this paper, I examine critically two key concepts—quoting and paraphrasing—required to arrive at conceptual clarity and the implications these carry for authorial voice integration. I interrogate common but flawed justifications for quoting or paraphrasing, and reveal how the decisions, if not taken critically, potentially distort the synergy between authorial voice and the writer’s voice. This necessitates the proffering of a principled rationale for the use of quotes and paraphrases. I survey the fragmented theoretical positions from which the deployment of these citation practices can be inferred and synthesise insights from these diverse positions to propose a practical decision-making framework to guide writers in applying quotes and paraphrases in their scholarly writing. I conclude by proposing a targeted theoretical framework that provides a foundation for future work on source use in scholarly writing.

## Conceptual and literature review

### Distinguishing between direct quotes and paraphrases

The quote-paraphrase conceptual distinction is requisite for an appreciation of their distinctive functions, and their principled use in scholarly writing. A direct quote is the verbatim copying of the actual wording, structure, and order of the author’s utterance owing to the writer’s huge respect for the author’s authority. A paraphrase is the restatement of an idea from an original source with the writer employing their own words and sentence structure while retaining the original meaning (Ardelia & Tiyas, 2019). However, poor integration and overuse of quotes results in patchwork writing that compromises coherence, tone and style consistency, depth and originality, as well as logical progression.

Paraphrase goes beyond merely altering a few words and involves understanding the original text, and the complete restructuring or reformulating of ideas, while maintaining fidelity to the original intent and context. Patchwriting is “copying from a source text and then deleting some words, altering grammatical structures, or plugging in one-for-one synonym substitutes” or paraphrasing “too closely to the language of their sources” (Howard & Jamieson, 2021, p. 386). Hirvela and Du (2013), cited in Sun (2024), fault decontextualized paraphrasing that focuses on rephrasing to avoid plagiarism at the expense of real rhetorical purposes. The nuances, connotations, subtleties of meaning, relationships among ideas, and implications of the original text must be understood and borne in mind so that they too are retained in the paraphrased version. In the reformulation of original textual content, structural changes may be made. In a paraphrase, a balance should be struck between “accurate representation of source ideas, and substantial transformation of source language” (Du, 2019, p. 53). As Khismawan and Widiati (2013, p.136) have put it, the original statement and the paraphrased version should be “lexically and syntactically different while remaining semantically equal.”

In using both quotes and paraphrases, care should be taken to preserve the original meaning, authority, impact, or rhetorical force of the authorial voice, with proper attribution made to the original source. Du (2019) equated direct quotes to patchwriting or textual borrowing and

paraphrasing to textual transformation. While there is no manipulation of the source material in direct quotes, there is much engagement with, rewording, restructuring, re-representing, and interpreting of the source material in paraphrasing. Paraphrases, therefore, require the deployment of higher cognitive resources than do direct quotes, and have a higher risk of plagiarism through the failure to significantly depart from the author's wording, even when the technical conventions of attribution are met. The author's voice is paramount and sacrosanct in direct quotes, whereas in paraphrases it is the writer's voice that features strongly, almost prominently. Booth et al. (2016) identified a critical distinction in functionality between quotes and paraphrases when they noted that quotes lend weight whereas paraphrases provide synthesis, both of which are indispensable to presenting sound arguments. While direct quotes are powerful for precision and authority, paraphrasing is good for demonstrating understanding and synthesis. That is why a judicious blend of quotes and paraphrases is better than an exclusive reliance on either.

Misconceptions account for flawed use of quotes and paraphrases and potentially distort the representation of the spirit and intent of authorial voice in scholarly writing, hence the need to analyse them.

### Misconceptions that contribute to the conundrum

I list without elaboration, a few misconceptions about the use of quotes or paraphrases that I assume account for their misuse. These are:

- Direct quotes magically make a text professional or academic and so they should be the dominant way in which authorial voice is imported into the text.
- Direct quotes can speak for themselves and do not need analysis or connection to the argument.
- Paraphrasing is easier than using direct quotes.
- The longer the quote, the more substantial the argument, and the less the writer needs to engage with it.
- Quote-heavy text evinces the amount of research that has gone into the scholarly work.
- Just changing a few words from the original text makes it a paraphrase.

The use of quotes and paraphrases is often guided more by convenience or surface-level premises than by principled and judicious reasoning. I outline some of the most common but invalid justifications for their use, and how they compromise analytical accuracy.

### Invalid reasons for preferring direct quotes over paraphrases

Academic writers have based their decisions to offer direct quotes on precarious pedestals. They have preferred direct quotes to paraphrases simply because they do not understand the material well enough to represent it in their own words. Magyar (2012, p. 7) noted that “. . . paraphrasing is predicated on having sufficient linguistic resources to manipulate language”, and, where the writer feels they lack such ability, they may default to direct quotation. Magyar

quotes the response of study participant Nuk, that “my English vocabulary is simple and limited. If I use my own words, it will not be academic” (p. 7). The use of a quote in this case is meant to mask poor understanding of concepts that are imported. This affects the quality of the incorporation of that quote into the general discussion. The sandwich approach to the incorporation of a quote requires that a context for the source material be given to introduce the quote, and then a follow up of the quote with relevant analysis is required. Where the quote that should be sandwiched between the context and the analysis is ill-understood, both the material preceding and following the quote would either not fit in with the quote or be missing. That amounts to mere copying from an external source, results in sources appearing in contextual isolation, and causes over-citation, failure to critique the material quoted, as well as bland and uniform source integration. In a study on University of Botswana students’ use of reporting verbs for cited material, Ramoroka (2014) found much copying and pasting of authorial material was possibly because of the ease with which the integration of direct quotes into the writer’s argument is perceived.

The decision to quote has also been based on the quote sounding complex, impressive, or sophisticated when it does not contribute materially to the argument. In such cases, quotations are imported just to make the text sound scholarly and to prove that the writer has read extensively on the subject. A quote may be employed to impress the reader through the author’s fancy, flowery, complex, striking, and sophisticated language or jargon. The writing style is even compromised when the impressive language in the quotes is not met with commensurate sophistication in the rest of the text.

Since paraphrases require complex and critical engagement with the original text as Sulistyaningrum (2021) has pointed out, some writers choose to quote verbatim because they envision direct quoting as being easier and less time consuming than paraphrasing. Such a decision to quote is made for the writer’s convenience and does not add to the soundness of the writer’s argument. Sometimes, the fear of making mistakes and misrepresenting the author’s ideas drives writers to quote rather than paraphrase. As Dahlen et al. (2024, p. 3) put it, “. . . students’ lack of trust in their own authority as writers impedes their ability to paraphrase original text and instead forces them to rely on direct quoting to gain a stronger voice.” The writer then misses an opportunity to demonstrate understanding of the author’s ideas.

The effect of such an inappropriate rationale for selection of direct quotes is exemplified by Dahlen and colleagues’ (2024) study, which found that direct quotes “were often used when a paraphrase would have been more appropriate (90%), and for the most part, did not conform to the full “quote sandwich” format (66%).” Doolan (2023, p. 721) called overreliance on direct quotation and reproducing source material “naïve strategies”, which, as Davis and Beaumont (2007), cited in Khrismawan and Widiati (2013), said, compromise fluent writing.

### Invalid reasons for preferring paraphrases over direct quotes

Paraphrases are sometimes preferred to direct quotes to circumvent having to provide the proper and accurate attribution. A writer using APA 7, for example, that requires a page number for a direct quote may use a paraphrase if they are unsure about the page number, or where the

source is not paginated. The writer then sacrifices the power and impact of the direct quote on the altar of convenience.

Paraphrasing may be used to mask one's misunderstanding of the author's idea, and even to impose one's idea but enlist the author to lend credence to that idea. An example of the latter would be paraphrasing Creswell and Poth's (2018, p. 45) statement, "Qualitative research emphasizes exploring and understanding the meaning individuals or groups ascribe to a social or human problem" as "According to Creswell and Poth (2018), qualitative research is superior to quantitative methods because it captures authentic human experiences that numbers cannot measure." While the original statement is neutral and merely defines qualitative inquiry, the writer imposes a comparative superiority claim absent from the original, enlisting the authors to bolster the writer's personal bias.

Some practical but invalid motives would be to use paraphrases to shorten text in keeping with word count limits, thereby compromising the strength of the original text. In some instances, the writer may consider the language in the original text too controversial, too strong, or too weak for their argument, and decide to strip the text of the original impact and reformulate it to take the desired tone. This disqualifies the resultant version as a paraphrase since it loses the tone of the original. It would be better to represent the original idea and its controversy with a direct quote and then draw attention to the controversy or the inappropriateness of the tone.

In contrast to these flawed assumptions and unfortunate criteria used as bases for decisions to quote or to paraphrase, I go on to discuss a sound and theoretically grounded rationale for when and why to quote or paraphrase to enhance context-sensitive and meaningful application of the citation practices.

### Valid criteria for using direct quotes

It is important to consider the centrality of the actual wording to the argument being made to determine whether to quote verbatim. Direct quotes should be used when it is important to retain original phrasing or wording that is powerful, authoritative, or particularly significant, or distinctive in some identifiable way. In such cases, paraphrases would rob the original text of its impact and distinctiveness and make it commonplace. A statement like "You do not rise to the level of your goals. You fall to the level of your systems" by Clear (2018, p. 162) has such a careful play on words that a writer cannot paraphrase it without watering it down. This is an example of an iconic and concise statement that needs no reformulation lest its impact is diluted.

Direct quotes are also important where reference is made directly to primary texts, legal documents, historical documents, or specific statements whose exact words are too foundational to be altered without losing meaning. That is why theorems, rules, and laws need to be quoted verbatim. Popper's (2002) principle of scientific falsification which states that "A theory which is not refutable by any conceivable event is non-scientific" (p. 36) is one such example where a direct quotation is warranted to preserve conceptual precision and rhetorical power, as well as avoid subtle misrepresentation.

When a writer wants to engage critically with an author's exact language, they should quote it verbatim and then analyse it. In such cases, typical of Literature, Philosophy, and Law, the exact words are the subject of analysis or interpretation. Orwell's (2000) famous quote, "All animals are equal, but some animals are more equal than others" (p. 112) is illustrative of wording from a literary text that should be quoted verbatim for rhetorical or literary analysis. The wording is so impactful and memorable that to reformulate the statement would strip it of its potency, impact, and memorability. The linguistic paradox in this political satire is meant deliberately to violate logic or introduce a logical contradiction in suggesting that an absolute like equality has degrees, to expose the manipulation of language to justify inequality by those wielding political power.

Where a specific term, phrase, or utterance originated with an author, it is important that it be quoted directly. Examples are definitions unique to individual authors, which the writer should present verbatim before engaging with them to eliminate the likelihood of misrepresentation or alteration of their meaning or scholarly accuracy. Sometimes, the authority and weight of the source is significant and foundational enough to merit direct quotation. A constitution or legal document depends, for its validity, on the precision and clarity of its expression, and the writer should preserve the exact legal or institutional language when they import its ideas into their writing.

If the writer must bring in authorial material that is loaded, controversial, biased, or provocative, quoting it verbatim will avoid misrepresenting the author and also retain the tone, intent, and impact. Paraphrasing the verbal remark, "Standardized tests have become the most effective racist weapon ever devised to objectively degrade Black and brown minds and legally exclude their bodies from prestigious schools" by Ibram X. Kendi in 2020 and cited by Walker (2021) by simply saying "Kendi, cited by Walker (2021), is critical of standardised testing" is to miss the tone and intent of the author.

### Valid or strategic criteria for using paraphrases

The most obvious rationale for paraphrasing should be the writer's understanding of the material and the ability to synthesise and represent it in their own words and structure an argument without losing the meaning and tone of the original. Language proficiency barriers can militate against the decision to paraphrase since doing so necessitates possession of a range of vocabulary, sound syntax, and precision. The complexity of paraphrases is seen in the taxonomies that have been developed for grading the nature of paraphrases such as "near copy," "minimal revision," "moderate revision," and "substantial revision" as well as "lexical paraphrasing", "syntactic paraphrasing", "conceptual paraphrasing", and "global paraphrasing" with a number of fine-grained sub-categories" (Zhang, 2020, pp. 3–4). Sulistyaningrum (2021) faulted digital paraphrasing tools for their reliance on substituting words with their synonyms but retaining the overall syntax of the original statement since this leads to poor expression. This further underscores the demands paraphrasing makes on the reader.

Paraphrases are needed when the idea has greater importance than the actual wording of the original text. Writers need to ask themselves what they are borrowing from the author: is it the wording and meaning or the idea alone?

Paraphrases are also important when the writer wants to maintain the narrative flow of the text and its original voice. The author and the writer have unique writing styles and sometimes a direct quote fails to gel seamlessly into the writer's style, leading to a sense of patchwork. In such a case, a paraphrase may be undertaken to ensure that the style of the authorial voice is consistent with that of the rest of the text. Uniformity in style is not just a matter of aesthetics but is also a contribution to the reader-friendliness of the text.

The original text may be too long to be impactful as a direct quote and overusing ellipses to eliminate superfluous words may interfere with sustained reading. In such a case, a paraphrase is preferable. Sometimes the original text may embody an idea that would bolster the writer's argument, but the idea may be couched in complex or technical language that may compromise intelligibility. A paraphrase of the original idea would be a better way to ensure clarity. With all this in mind, I summarise the dimensions that guide the decision to quote or paraphrase in tabular form below.

### Summary of core guiding components for quote-or-paraphrase decisions

**Table 1**

A summary of core components and principles informing the quote-paraphrase decision

<b>Dimension</b>	<b>Quote</b>	<b>Paraphrase</b>
Rhetorical value	When the actual wording is impactful, authoritative, or embodies rhetorical force	When the idea is more important than the specific wording of the original
Clarity of presentation	When the original text is clear, concise, and self-explanatory	When the original is dense, technical, or abstract, and needs simplification
Analytical purpose	When the purpose is to analyse, critique, or comment on the specific wording of the original text	When the purpose is to synthesise, explain, or support own argument
Authorial voice and flow	Where the direct quote is meant to maintain the writer's narrative style and tone.	Where use of a direct quote may disrupt the flow of communication, and the new material is meant to blend with the writer's own style
Cognitive load or mental effort required	Where the integration of authorial voice requires less synthesis but more contextual framing	Where the integration of authorial voice requires higher-level processing, interpretation, synthesis, and semantic reconstruction, and internalisation of knowledge/ comprehension

<b>Dimension</b>	<b>Quote</b>	<b>Paraphrase</b>
Precision or loyalty?	When focus is on maintaining loyalty to the source material	When focus is on the comprehensibility of content for the audience
Shift of authority	When the purpose is to emphasise the author's credibility and authority	When the purpose is to shift authority and credibility to the writer
Impact	Where the quote carries with it emotional or cultural (etc.) depth or significance that would be compromised when rephrased	When the impact of the original text can still be maintained in a rephrased version of the original or can be transformed it into something novel

For the convenience of the writer and would-be-writer, I crystallise and condense the components and principles in Table 1 to present a decision checklist that helps to standardise the quote-paraphrase decision-making process based on specific criteria and reduce subjectivity and mere discretion. The checklist allows for accuracy, consistency, and broader coverage of important and requisite considerations. For the writer, the checklist would simplify a complex decision-making process and provide confidence in the soundness of the decisions made. In Table 2, I capture and name the checklist, encapsulating sound criteria for quoting or paraphrasing.

**Table 2**

The Quote-Paraphrase-Determination Checklist (QPDC)

<b>Guiding Question</b>	<b>If Yes...</b>	<b>If No...</b>
1. Is the language unique, memorable, rhetorically powerful or central to my analysis?	Quote	Paraphrase
2. Do I need the author's exact words, and is the original voice important to retain?	Quote	Paraphrase
3. Can I express the same idea in my own words without losing meaning and intent?	Paraphrase	Quote
4. Can I incorporate the idea in a way that fits my writing style and keeps the original meaning?	Paraphrase	Quote
5. Do I fully understand the original and feel confident rephrasing it?	Paraphrase	Quote
6. Is the original statement loaded, provocative, famous or controversial?	Quote	Paraphrase
7. Are the original words themselves the focus of my analysis or interpretation?	Quote	Paraphrase
8. Do I need to preserve the exact structure and creative essence of the original text?	Quote	Paraphrase

<b>Guiding Question</b>	<b>If Yes...</b>	<b>If No...</b>
9. Do I need to simplify or clarify a complex or technical idea pivotal to my point?	Paraphrase	Quote
10. Do I need only specific aspects of the original text relevant to my argument?	Paraphrase	Quote
11. Is the source highly authoritative and precise in its wording?	Quote	Paraphrase
12. Do I need to condense a large amount of information into a shorter form?	Paraphrase	Quote
13. Is the original a coined term, key concept, or specific definition?	Quote	Paraphrase
14. Do I need to preserve distinctive wording or subtle nuance in the original?	Quote	Paraphrase
15. Is the idea itself more important than how it is worded?	Paraphrase	Quote
16. Am I trying to synthesise ideas from many sources into a cohesive argument?	Paraphrase	Quote
17. Is it a key statement by a key author in the field?	Quote	Paraphrase
18. Do I want to provide indisputable evidence of an incredible claim?	Quote	Paraphrase
19. Is the material particularly well-known?	Quote	Paraphrase
20. Do I want to eliminate less relevant information?	Paraphrase	Quote

The principles that I distilled into this checklist are conceptual and meant to guide the practical decision-making process. These checklist questions provide sound criteria on which decisions to quote or paraphrase can be made judiciously. The criteria would guard against the under- and over-use of direct quotes typical of most academic papers. On the one hand, the under-use of direct quotes may result in the academic text lacking authorial credibility, rhetorical impact, evidential support, blurred source boundaries from paraphrase over-use, and distortion of the original meaning. On the other hand, over-use of quotes would drown the writer's voice, overwhelm the reader, and reduce critical engagement with material. As Dahlen et al. (2024, p. 3) have observed, much source use takes the form of reporting information than engaging with it in deeper, meaningful, and transformative ways.

It is important to realise that the decision to quote or paraphrase is not made in a vacuum but is informed by some implicit theoretical perspectives. Several theoretical standpoints implicitly inform the quote-paraphrase decisions, and I infer their contributions to the quote-paraphrase determination in academic writing.

## Extant theoretical positions informing decisions to quote or paraphrase

I draw on many theoretical perspectives to propose a theoretical framework for whether to quote or paraphrase.

### Rhetorical and referential perspectives

The decision to quote or to paraphrase can be inferred from two distinct but interrelated perspectives—the rhetorical and the referential. They determine the extent of the writer’s engagement with source material in fundamentally diverse ways.

On the one hand, the referential perspective positions paraphrasing and quoting as being mainly about fidelity or representing information faithfully and accurately. Emphasis is on what the source says—the information, facts, or ideas it contributes to the writing. In this view, paraphrasing is usually the preferred approach when the aim is to represent information clearly and concisely in the current writer’s own words, where the original wording of the source is not idiosyncratic or particularly distinctive. Quoting is used when the exact wording has particular precision, authority, or semantic impact that would be lost in being paraphrased. The referential view is consistent with traditional notions of academic integrity, which stress accurate representation and crediting of original sources or convention over engagement.

On the other hand, the rhetorical perspective highlights what quoting or paraphrasing does in the author’s own argument. Source use goes beyond the presentation of information to situating the writer’s ideas in relation to other voices. Rhetorical function extends to “. . . knowing how to incorporate, build on and critique others’ work” (Magyar, 2012, p. 11). A quote can serve to align with, contrast, or challenge a hegemonic voice, or even provide stylistic richness. The rhetorical purpose of source integration is more epistemological than technical or mechanical. Paraphrasing may function to domesticate a source, merge it seamlessly into the author’s voice, or reinterpret it. Quoting and paraphrasing become writers’ acts that, not only target fidelity, clarity, or accuracy, but also engender rhetorical effect and management of authorial voice and intent.

The two perspectives enrich the writer’s repertoire of the range of functions quoting and paraphrasing can serve. The rhetorical perspective emphasises the strategic manipulation of sources, whereas the referential perspective emphasises objectivity and precision. The referential perspective is almost mechanical, straightforward, and surface-level, whereas the rhetorical perspective is a deep-level approach requiring understanding and engagement with source material in relation to the writer’s presentation and argument. Magyar (2012, p. 12) distinguished between attribution, a “complex socio-linguistic practice” and referencing “the mechanics of referencing and citation”, a distinction reflective of the rhetorical and referential function of quotes and paraphrases respectively. The two perspectives underscore the importance of considering source use as more than a rule-bound activity, but a domain where

form follows function in critical decision-making that is responsive both to the source content and to what the writer wants to do with it.

### Rhetorical genre theory (RGT)

Hyland's (2002) genre theory posits that some academic genres lend themselves more to particular source integration techniques than others. It provides a perspective on understanding source integration decisions as they relate to whether to quote or paraphrase by presenting academic writing as a social and situated activity. Quoting or paraphrasing does not happen in a vacuum but is a context-bound genre-sensitive rhetorical action. The literary analysis genre, for example, has a preponderance for extended quotations compared to scientific text actuated by a desire to succinctly present findings. Source integration norms are not uniform but dependent on disciplinary diversities and epistemologies. A generous use of direct quotes in a field that prioritises synthesis gives a semblance of lacking originality, whereas overly paraphrasing in a genre that prizes direct textual engagement may be interpreted as being evasive. Genre expectations are, therefore, a key consideration in source integration decisions. They also depend on the purposes of the readers of authorial material whom Paré (2014, p. 89) observes "are not a monolithic or passive entity that simply absorbs the available meaning but, rather, . . . re-construct it based on their own needs, roles, and backgrounds. . . ." However, genre considerations (which are external deterministic disciplinary conventions) must be complemented by internal judicious reasoning from the writer's agency and in relation to the rhetorical goals of their argument. The writer's agency does not release them from regulation but reflects "the multi-voiced nature of all discourse" (Paré, 2014, p. 90) and the "contested and provisional nature of academic conventions" (Magyar, 2012, p. 12). The writer should not just go about quoting or paraphrasing because the genre has a propensity for the kind of source use.

### Cognitive load theory (CLT)

The premise of CLT is the recognition of the limited capacity the human working memory has, and the need to reduce unnecessary cognitive demands to enhance performance. Clark et al. (2011) identified components of the cognitive load as intrinsic, extraneous, and germane. Intrinsic load denotes inherent material complexity, extraneous load emanates from poor material presentation, and germane load is the requisite mental effort to learn and integrate knowledge. Dense and complex texts raise the intrinsic load and compel writers to quote to avoid the deep processing paraphrasing would require. Where tasks are ambiguous, confusing or unclear, they raise the extraneous load and students then default to direct quotes. When the writer has the mental reserves to invest in sound comprehension and processing of authorial material, their germane load is low enough to allow them to paraphrase authors' original texts and integrate them into their arguments. Paraphrasing imposes higher cognitive demands on the writer than does direct quotation since it requires source comprehension, reformulation, and integration knowledge while preserving the original meaning and intent. The tasks increase the intrinsic cognitive load (the complexity of the task itself) and the extraneous load (the mental effort that has no direct bearing on learning). In quoting, the writer reproduces the author's exact language which lowers the cognitive load. This explains why novice writers

normally use direct quotes as the default. However, overuse of decontextualised and unexplained quotations may increase extraneous cognitive load for the reader than paraphrasing done properly. Writers, therefore, should consider not just the rhetorical and referential implications of quoting or paraphrasing, but also the resultant cognitive demands of the decisions both on them and their readership.

### Critical academic literacies

Academic Literacy theory sees writing as more than just an encoding literate skill, but a social practice governed by academic community discourses and conventions. Applying the academic literacy theory to source integration, quoting and paraphrasing are envisaged as ways in which writers engage with authorial knowledge and assert their scholarly identity. For Magyar (2012, p. 10), “attribution is not a straightforward value-free academic convention involving referencing the work and ideas of others. Rather, it is a complex practice predicated on culturally and historically situated ideas about texts, knowledge and ownership.” Critical literacy sees aspects of literacy like reading and writing as acts of power (Petric, 2007 in Ramoroka, 2014), resistance, and transformation. The power lies in whose voice and authority is valued. Citation practices then play the role of reinforcing the authority. For instance, if in the argument the author’s authority and voice is more important than that of the writer, then direct quotes reflect the differential power dynamics. Citation practices cease to be merely neutral academic conventions or requirements but political decisions about the representation of power dynamics. Considerations are made regarding whether paraphrasing an idea would erode its power or erase its identity. Determinations would need to be made on whether integration of external sources was about unquestioning reproduction of dominant perspectives. The two theories complement and intersect in that, while academic literacy is about the academic rules surrounding citation, critical literacy interrogates the power bases of those rules, which necessitates the writer’s critical choice to quote or paraphrase. In academic literacy, just developing an academic voice is sufficient but critical literacy requires that dominant voices be challenged so that the writer does not become a reporter or compiler of others’ ideas but is positioned as an independent and critical thinker who navigates citation norms. Quoting accords greater legitimacy and so quoting and paraphrasing is not simply a matter of literacy but is part of the politics of citation related to epistemic privilege.

Considered together, the two theories transcend instruction on quoting or paraphrasing to the rationale behind the decisions, based on power and identity, and the agentic role of the writer in the academic discourse.

### Bloom’s taxonomy

I considered Bloom’s revised taxonomy (Anderson & Krathwohl, 2001) and its influence on how quoting and paraphrasing align with different levels of cognitive engagement. Huit (2011) represented Anderson and Krathwohl’s (2001) revised Bloom’s taxonomy as remembering (recall of information), understanding (explanation and description), applying (novel use of information), analysing (distinguishing between diverse components or relationships), evaluating (judging the worth), and creating (rearranging components in a new way). These

can be mapped onto authorial source integration, where the cognitive thinking needed in quoting aligns with the first two levels, and that for paraphrasing matches the last four. The levels' successive nature can be applied to the referential and rhetorical functions of quotes and paraphrases in integrating authorial material to the writer's argument. Like cognitive load theory, the taxonomy indexes the level of cognitive processing quoting and paraphrasing impose on the writer. Quoting is surface or low-level engagement with source material at the lower-order thinking characterised by accurate reflection of remembered and understood material than analysis, evaluation, or creation of knowledge, which is transformative and higher-order. Paraphrasing is contingent upon a clear understanding of the source material and its expression in new ways that may include reshaping and recontextualising it to better integrate with the writer's rhetorical purpose. Direct quoting is consistent with knowledge transmission, whereas paraphrasing is consonant with knowledge transformation to reflect the writer's intellectual agency and engagement.

In this section, I reviewed diverse and often fragmented theoretical positions that inform the use of quotes and paraphrases. The lack of a coherent integrative theoretical perspective necessitates a novel framework to inform the principled selection and application of quotes and paraphrases. I propose a theory of textual engagement, that is also metaphorical, that I call the echo theory of authorial voice.

## Proposed theory

### The Echo Theory of Authorial Voice (ETAV): A multidimensional approach to textual integration

In the incorporation of an external voice and perspective into one's writing, one essentially determines the level of the authorial voice's prominence. It struck me that, through quoting and paraphrasing, the writer is determining the tone, the loudness, the cadence of the original, hence, the echo metaphor. Some parallels are instructive such as echoes having sources just as texts to be integrated into the writer's text have sources. Quotes allow the authorial perspective to resonate distinctly whereas paraphrases soften the sound but retain the essence. The issues of ownership of, connection to, or detachment from the original source depends on whether one is quoting or paraphrasing.

The echo metaphor is premised on the understanding that quoting or paraphrasing is more than just a recycling of facts but a thoughtful expression of the writer's understanding, expression, or credibility in a way that manages the impact, which the echo theory represents in sound. How authorial voice should resonate with the writer's expression depends on how the volume of the sound is tuned by the writer.

The metaphor underpinning the echo theory is the image of a frequency tuner button turned to determine how prominently the authorial voice should resonate. The frequency tuner for the echo theory has five levels that denote the author and writer relationship. These are the direct voice, blended voice, transformed voice, subtle or muted echo, and the independent voice in

the order of descending resonance and volume of authorial voice. For want of space, I present the echo theory in tabular form below.

**Table 3**

The Echo Theory of Authorial Voice (ETAV)

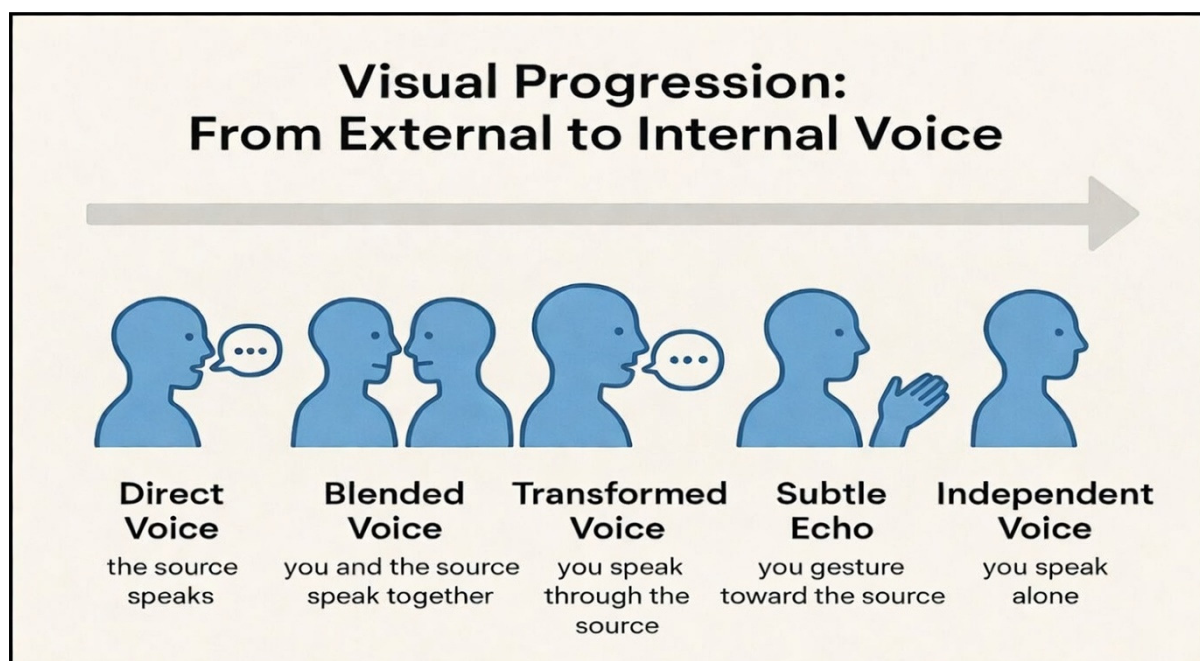
<b>Voice type</b>	<b>The ‘How’ to incorporate authorial voice</b>	<b>The ‘Why’ to incorporate the particular voice type</b>	<b>The ‘When’ to incorporate the specific voice</b>
Direct voice (Full quote)	Use a full, direct quote to retain tone, precision, wording, structure, and meaning of the original source.	To allow the author to speak in their full, crystal-clear echo. To have authorial voice ring out, not the writer’s.	When the original voice is exact, powerful, poetic, or authoritative, and expresses an idea better than the writer’s paraphrase When terminology/tone is critical to the text.
Blended/ Hybrid voice (Partial quote + paraphrase)	Combine a partial quote with own words (paraphrase). Echo the best lines of the original but carry the tune.	To stay close to the source while adding one’s own voice, thereby balancing authorial voice preservation with clarity of presentation. Extending the echo metaphor, it is keeping the original notes of a melody but adding your rhythm.	When a key phrase or term is powerful, but the surrounding text is not correspondingly striking and can be rephrased or adapted When the writer needs to blend citation fidelity with rhetorical clarity.
Transformed voice (Full paraphrase) Transform Meaningfully)	Fully paraphrase, transform, and reshape the authorial voice.	To own the meaning and express it in your voice and shift the original framing, while retaining the original intent. To demonstrate your own interpretation and understanding of the text from your own perspective.	When the idea is important but for clarity, tone, or fit, it can benefit from rephrasing When there is need to show sound comprehension, synthesis, and rearticulation of an idea for clarity, context, or fit.
Subtle or muted echo (Minimize reference and just allude)	Mention or allude to an original source without quoting or deep engagement with it. Background the source but integrate it into your argument.	To signal the authorial voice’s influence on the presentation without putting it in the spotlight. The echo is present but subtle and not central.	The idea is common, backgrounded, or not central. When a source is part of a larger pattern or not the focus When the authorial voice should be felt more than heard.

Voice type	The ‘How’ to incorporate authorial voice	The ‘Why’ to incorporate the particular voice type	The ‘When’ to incorporate the specific voice
Independent voice (No reference – fully original)	Introduce an original idea, fresh insight, original framing, or critique without referring to any authorial voice	To place your voice and perspectives, at the centre. To present a raw, original voice that does not echo but brings out an original idea or perspective.	When you are coming up with new insight, or when rejecting the framing of an authorial source.

The ETAV theory allows the adjustment of the dial to ensure that the tuner is not off-channel even slightly, and that there is the right resonance lest there be noise, interference, or distortion. An on-point tuner is a proper decision that places a quote and a paraphrase appropriately.

With the aid of, and informed by the Gradual release of responsibility model, I represent the ETAV Theory in Figure 1 below.

**Figure 1**  
The Echo theory continuum (Image designed by ChatGPT April, 24, 8\_27\_55PM.png)



If academic writing is where voice, habit, force, and power converge, then citation choices become acts of epistemic positioning. Reflective quoting and paraphrasing can disrupt citation hierarchies and foreground contextually relevant scholarship. This framework has implications for postgraduate supervision, academic literacy, and scholarly publishing in education, especially where Global South voices remain marginalised.

## Contribution of the paper

In this paper, I add to the accumulated discourse on academic writing and source use by providing a principled way to categorise legitimate and invalid reasons for quoting and paraphrasing on the basis of extant theoretical views. I make a nuanced contribution to scholarly discourse on source integration that distinguishes between rhetorical and referential rationale for quoting or paraphrasing and rhetorical and referential purposes and how they intersect to frame the function of authorial voice in academic texts. I draw on current theories and critique simplistic approaches that do not account for the writer's intentional stance in the academic discourse. I provide a heuristic tool that provides writers (particularly novice scholars) with a practical evaluative framework to make intentional, situated decisions concerning source use. I introduce a novel metaphor-driven theory of source integration, constructed as a five-level continuum, to explain how external authorial voices can function in the nuanced development of a writer's argument. I provide teachers and writers with conceptual and practical tools for developing more sophisticated textual integration in academic discourse.

Extending this in the Age of AI heightens the urgency for developing critical citation consciousness. As knowledge assemblers, generative AI will require users to consider whether AI is being utilised as an instrument, a partner, or a behind-the-scenes facilitator. This will further complicate the dialogic construction of texts. There is need to foreground the relationality inherent in the writer-text-author-audience-technology axis.

## Conclusion

I have interrogated the common but often unexamined practices of quoting and paraphrasing, revealing the risks of superficial engagement with sources and their implications. I argue for quoting and paraphrasing decisions to be based on more than mere mechanics, rules, or style, and consider both rhetorical strategy and referential need. Through its proposed framework and metaphorical continuum, I propose a reimagining of source use that transcends the binary choice between quoting or paraphrasing to a dynamic negotiation of voice, purpose, and power. The proposed theory goes beyond *what* is being cited to *why*, *how*, and *when*. Ardelia and Tiyas (2019) made an apt observation that the *when* of quoting and paraphrasing differs. My novel and nuanced approach enhances readers' rhetorical awareness and develops their confidence as intentional, dialogic, and critically engaged academic writers in the scholarly and academic discourse.

## Recommendations

To operationalise the insights from this paper, academic writing instruction should place rhetorical and referential functions of source use at the centre of academic literacy. Students should reflect on their decisions to quote or paraphrase, guided by the proposed five-level continuum ETAV theory and quote-paraphrase-determination checklist. Curricula and writing centres can experiment with the proposed theory and checklist to enhance students' engagement with disciplinary discourse practices beyond surface-level practices. Future

research could explore the proposed versatility of the theory and checklists across disciplines, genres, and linguistic contexts to develop reflective, rhetorically conscious academic writers who can integrate authorial voice with clarity, intentionality, and intellectual integrity and rigor.

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