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The role of metaphor in the corporate political strategies of health harming industries: Comparing the concept of balance in the gambling and opioid industry discourses

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ABSTRACT

Scholars have identified notable similarities between the political strategies employed by health-harming industries. This includes similarities in the narratives employed by industry actors seeking to oppose public health regulations that threaten their commercial interests. This study seeks to examine the use of a specific concept – the balance metaphor – in the policy discourses of two health-harming industries. Namely, the pharmaceutical industry implicated in the prescription opioid crisis in the US, and the UK gambling industry, whose products and practices are associated with a serious, but largely neglected, series of harms. We first review research on metaphors, demonstrating how this provides additional theoretically-informed concepts with which to understand how industry discourse circumscribes the terrain of policy debates in ways amenable to commercial interests. Building from these insights, we conducted a rhetorical analysis, examining how the concept of balance is employed by different actors in distinct contexts to shape understandings of the social and policy problems associated with gambling and opioid products and to promote industry-favourable regulatory responses to these. This brings a micro-level of analysis to supplement previous meso- and macro-level scholarship in this space. We use our findings to argue that the depoliticization of the policy process and objectivization of the policy space – in ways that obscure its contingent and political nature – through discourses of balance is itself an arch political act. Examining the metaphors used in policy debates and their functions provides important insights that can be used to inform the construction of counter-narratives to industry-favourable discourses, including the creative use of novel metaphors in the service of public health goals.

1. Introduction

There is a growing body of literature on the political strategies of health-harming industries (HHIs) – such as the tobacco, alcohol, ultra-processed food and sugar-sweetened beverage sectors (Ulucanlar et al., 2023) within the wider field of commercial determinants of health (CDOH) research (Gilmore et al., 2023). One such strategy is to frame policy problems and their solutions in ways amenable to their underlying commercial interests, which often negatively impacts public health (Koon et al., 2016; McCambridge et al., 2018; Ulucanlar et al., 2023). Previous studies have demonstrated a high degree of similarity between the political strategies employed by HHIs, including policy framing (Ulucanlar et al., 2023; Koon and Marten, 2023). Despite increasing recognition of the importance of language within the CDOH, less attention has been paid to the specific function of metaphor within commercial political discourses particularly from a comparative perspective.

Metaphors are a key component of language and the conceptual architectures through which we perceive and engage with the world around us (Lakoff and Johnson, 1980). They function by enabling us to 'see' one entity or experience in terms of another (Thibodeau et al., 2017). Metaphors shape how people think about complex social issues (target domains) by describing them in terms of *unrelated* but more familiar and less complex source domains, highlighting the value of

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studying metaphors and their effects in the context of health (and other public) policy debates (Thibodeau et al., 2017). For example, a lawyer with the WHO's Tobacco Free Initiative once used what is now an infamous metaphor to help reframe the tobacco industry as a key driver of the tobacco epidemic: '[t]he world's most widespread, serious infection is purposely spread by its vector: the tobacco industry' (LeGresley, 1999).

This paper seeks to address the role of metaphor in corporate political strategies by examining the use of a specific metaphor – balance – in the policy discourses of two HHIs in different policy contexts: 1) the US opioid industry implicated in the prescription opioid crisis; and 2) the UK gambling industry, whose products and practices are associated with a series of harms. We first review the literature on metaphor, focusing on developments in metaphor theory and analyses of the balance metaphor specifically. To demonstrate the potential value of these to the study of corporate political activities, we then examine the rhetorical functions of the balance metaphor and how it structures norms, ideas, policy problems and solutions in ways favourable to commercial actors.

2. Policy discourse and the function of metaphor

The art of rhetoric and the use of metaphor were traditionally seen as creative performances, or ornamental figures of speech (Moosavian, 2015). From this perspective, rhetoric is conceptualised as a persuasive act employed to win over audiences, and mobilise support for a political purpose. This implies a clear distinction between dispassionate, factual and transparent language on the one hand and partisan, emotive or even misleading language on the other, with clear assumptions about the normative and utilitarian primacy of the former over the latter in policy deliberations (Moosavian, 2015). This position is closely associated with the still influential paradigm of 'evidence-based' policymaking, in which 'politics' is seen as the barrier to 'truth' within a rational and ostensibly 'neutral' process of resource allocation (Hawkins and Parkhurst, 2016; Smith et al., 2015).

In recent decades, different understandings of metaphor and rhetoric have emerged in several fields, including critical policy studies, psychology and cognitive science (Howarth and Griggs, 2006; Thibodeau et al., 2017). For post-structuralist discourse theorists, for example, metaphors are understood to be constitutive in nature: key mechanisms through which meaning, identity and discursive formations emerge and are maintained (Howarth and Griggs, 2015). The creation and use of metaphors is therefore an act of power, promoting particular ideas, norms and policy discourses, while excluding or backgrounding others, and providing an emotive underpinning for these discourses (Howarth and Griggs, 2015). For example, Howarth and Griggs (2006) examine how proponents of airport expansion employed particular metaphors, 'freedom to fly' and 'sustainable aviation', in an attempt to undermine and neutralise environmentalist critiques of UK aviation policy.

In the field of cognitive science, proponents of conceptual metaphor theory (Lakoff and Johnson, 1980), argue that 'the way we think, what we experience, and what we do every day is very much a matter of metaphor'. Their position, that metaphor is thus 'not just a matter of language, but of thought and reason' (Lakoff, 1993), is based on three core theoretical claims: 1) that metaphors are grounded in our embodied, physical experience of the world; 2) that metaphors *reflect* or *mirror* human conceptual representations; and 3) that metaphors *shape* or *influence* how people reason about, or explain, the complex and often abstract phenomena that constitute social reality (Lakoff and Johnson, 1980; Thibodeau et al., 2019). In this way, metaphors tacitly convey and generate meaning (Schön, 1993). This allows them to become deeply sedimented and highly conventional to the extent that they are no longer recognised as being metaphors at all (Larson, 2011).

Schlesinger and Lau (2000) find that exposure to specific metaphorical frames can be more important in shaping perceptions of complex issues than political knowledge or ideology. Metaphorically imbued social institutions – 'combinations of norms, practices, and organizational arrangements' (Schlesinger and Lau, 2000; Nimmo and Combs, 1980; Gamson, 1992) – mediate our engagement with the world and provide a lens through which we can understand more complex social issues and policy problems. In other words, individuals reason and arrive at judgements on complex or novel policy issues through metaphorical association with more familiar or easily understood social institutions. Like all heuristic devices, metaphors act to frame our understanding of issues by (de)emphasising specific aspects and understandings of the issue with implications for decision-making and attitude formation (Kahneman et al., 1982). Thus, the embedding of particular metaphorical framings as a dominant paradigm through which an issue or process comes to be seen can foreclose other ways of thinking with considerable consequences for policy-making (Lakoff, 1991; Shimko, 1994; Larson, 2011).

Many of the most powerful metaphors are so conventional that many speakers will not even recognise them as such (Lakoff and Johnson, 1980; Landau et al., 2014; Larson, 2011). However, the effects of metaphorical framings are in part moderated by an individual's motivations when reasoning about a given issue; namely, their 'epistemic motive' or desire for certainty, consistency or accuracy (Landau et al., 2014). In addition, Landau et al. (2014) argue that the metaphors used to define issues may differ between different epistemic and policy communities with political gridlock emerging between groups employing incompatible metaphors to understand the object of contention. By highlighting the metaphorical, rather than literal, nature of policy discourses, and the differing conceptualisation of policy problems associated with these, may, therefore, serve to break policy gridlock and facilitate compromise (Schlesinger and Lau, 2000). This process is similar to Rein and Schön's (1994) concept of 'frame reflection' and the role of 'generative' metaphors as a means of unlocking solutions to intractable policy problems (Schön, 1993).

3. The metaphor of balance

Previous studies have examined the rhetorical function and consequences of the balance metaphor in different areas of public policy, revealing its pervasiveness across time and context. In the field of environmental policy, Patterson and Lee (1997) analysed the debates around the relicensing of the Kingsley Dam in Nebraska to demonstrate how the concept of balance shaped the policy discourse and the role of the public in the decision-making process. The idea of balance, they argue, reifies the core rationalist and pluralist assumptions of 'interest group liberalism'. The latter identifies a policy agenda that is accessible to all stakeholders as inherently good and all organised interests, from commercial entities to citizens' groups, as legitimate policy actors, but fails to differentiate between them in terms of their specific objectives or their relative power to influence procedures. Given these assumptions, it is easy to see how the idea of balance becomes the key norm – what the authors call the 'god term' – underpinning the policy process. The consequence of this is to procedurally diminish the role of the general public (beyond organised interest groups) and to mask over the subjective and value-based, versus technocratic and objective, nature of the policy process by reducing the role of government and regulatory bodies to that of 'impartial arbiter' between competing interests. Such interests are to be viewed as distinct entities to be collated and weighed as part of an administrative exercise based on the use of formalised stakeholder consultation and cost-benefit analysis through which technical expertise is said to both achieve balance through balance. Yet the mechanism for the weighing of competing claims remains elusive within the discourse: 'The metaphor is both the end and the means' (Patterson and Lee, 1997). Thus, Patterson and Lee (1997) argue, 'the potent affect and cognitive ambiguity of "balance" are the sources of its rhetorical power', meaning that:

> On the one hand, "balance" evokes the precision of the objective scale; on the other, it evokes the democratic value of equity. As a

result, "balance" connotes a process that is simultaneously precise and fair (Patterson and Lee, 1997).

The concept of balance is also prevalent in the context of legal proceedings. Moosavian (2015) critically examines the role of the balance metaphor in misuse of private information case law. Echoing Patterson and Lee (1997), she argues that the idea of balance:

> creates an impression of certainty by drawing on connotations of the quantifiable and calculable [and] fosters the moral appeal of a decision by alluding to notions of justice and equilibrium. In doing so, the balance metaphor marginalises the non-rational, inexpressible, even mysterious, aspects of judicial rights balancing (Moosavian, 2015).

The balance metaphor has a reifying effect on the concepts, ideas and values at the heart of legal processes since the act of weighing is 'undertaken in relation to two objects, two "things" with a physical presence'. Consequently, competing rights become 'physical objects of variable weight' despite their evaluation involving non-rational, qualitative and normative judgements. Balance thus 'acts as a convenient fiction which overlays an inherently creative, subjective and, to some extent, inexpressible interpretive activity' at the heart of the legal process. Moosavian (2015) explains that the power of balance lies in its implicit claims to scientific rationality and a will to certainty. Fish (1989) describes this 'impersonal method' as 'both an illusion and a danger (as a kind of rhetoric [that] masks its rhetorical nature).'

The origin of the scales as the symbol of justice dates back to antiquity but it evokes the idea that the optimum outcome from any dispute is a return to a status of 'equilibrium and harmony' between opposing values and interests, in ways that favour 'synthesis and reconciliation over contestation and conflict' (Moosavian, 2015). The idea of balance has a reassuring effect because it holds out the promise that tensions between issues and actors can be resolved and erased, what Moosavian terms 'the allure of reconciliation', again echoing the findings of Patterson and Lee (1997). Yet this masks the fact that any legal judgement must ultimately decide (at least partly) in favour of one actor over another. Thus the balance metaphor functions as a 'disguised metaphorical device' which holds out the promise of harmony and reconciliation while masking over the conflictual nature of legal cases and the inevitable imbalance in outcomes between litigants (Moosavian, 2015).

The concept of balance is a key metaphor in the field of journalism and debates surrounding political news coverage, particular in the context of state-funded, formally apolitical broadcasters such as the UK's BBC. Wahl-Jorgensen et al. (2016) argue that balance functions as a metaphor representing the concept of impartiality which is the 'cornerstone' of the BBC's principles of public service broadcasting. This paradigm of 'impartiality-as-balance' is primarily enacted by juxtaposing, and giving equal time to, the positions of the two main, UK-wide political parties on a given issue. The effect of this approach is to narrow down the range of voices heard, particularly in the most contentious policy debates (Wahl-Jorgensen et al., 2016, see also Patterson and Lee, 1997). This shapes the framing of stories in terms of party-political contestation at the expense of more nuanced engagement with the issues, reproducing existing power structures and preferencing of elite voices (Wahl-Jorgensen et al., 2016). The embedded media paradigm of impartiality-as-balance has been shown to serve vested interests, such as tobacco and fossil fuel industries (Christensen, 2008; Oreskes and Conway, 2011). Boykoff and Boykoff (2004) demonstrate how, in their adherence to the norm of balance, major US newspapers have historically provided biased coverage of anthropogenic global warming and required responses, a phenomenon they named 'balance as bias.'

Rhetorically powerful metaphors, such as balance, can become embedded in political discourse, and appeal to deeply held values. Yet how such metaphors shape political debates, galvanize coalitions of interest, and influence the regulation of HHIs remains under-analysed in CDOH research. In response to this, and as proof-of-concept regarding the value of analysing the micropolitics of language, we examine how the balance metaphor has been employed by different actors within distinct settings to advance the interests of the pharmaceutical and gambling industries at the expense of public health and societal wellbeing.

4. Methods

The analysis presented below forms part of two larger research programmes examining the corporate political activities of two comparatively under-researched industries. Identification by the authors of the use of the balance metaphor by both the gambling and opioid industries raised important questions about its deployment by different sectors and in different policymaking contexts in a field in which the need for more cross-industry analysis has been identified as a research priority (Maani et al., 2023). We adopt a case study approach (Yin, 2009), focusing on corporate rhetorical strategy in: (1) the Gambling Act (2005) and subsequent gambling policy developments in the UK; and (2) the Pain Relief Promotion Act (2000) and subsequent opioid policy developments in the USA. While these two cases concerned different industries, in different countries, their activities occurred at similar points in time and the invocation of balance in each instance was amenable to comparison in ways that illuminated the role of this metaphor in health policy debates.

In both cases, data collection was pursued through an iterative process, consistent with the principles of interpretive study design (Schwartz-Shea and Yanow, 2012) and established archival research approaches (Holden and MacKenzie, 2016). For the UK gambling industry, we identified relevant policy documents that emerged during the passage of the 2005 Gambling Act, including a report based on a formal review of gambling laws, and the subsequent white paper and draft bill, and ensuing policy developments through searches of the literature, government and parliamentary websites and archives for stakeholder submissions, reports and government responses related to formal consultations and inquiries. We also collated publicly available materials produced by the gambling industry and those in receipt of its funding as part of their engagement with these events (see van Schalkwyk, 2023).

For the US opioids industry, we reviewed background reports and congressional hearings from the failed Pain Relief Promotion Act (2000) in the US. Through this process, we identified a primary frame sponsor of the "balance" metaphor in the opioids discourse. For this reason, we focused on the internal and external documents of the Pain and Policy Studies Group (PPSG) at the University of Wisconsin, which received at least $2.5 m in funding from opioid manufacturers (Fauber, 2011). Documents were identified through a key word search in the Opioids Industry Document Archive, using established archival research methods (MacKenzie et al., 2023). Finally, we used hand searches in Google to identify materials and pursue lines of inquiry that remained incomplete following searches from the previous four sources. We selected documents for deeper analysis of the concept of balance based on an initial reading of the aforementioned sources.

From a discourse-theoretical perspective, we conducted a rhetorical analysis of the documents to identify the ways in which the metaphor of balance was used in the construction and reproduction of policy discourses (Howarth and Griggs, 2006; Moosavian, 2015). Specifically, drawing on post-structural discourse theory, we examined: (1) how the balance metaphor structures meaning and problem definitions and solutions in ways favourable to the interests of the gambling and opioid industries and (2) how the metaphor was employed by different actors in the context of distinct policy debates and regulatory and political settings.

5. Findings

5.1. 'Striking the right balance': balance and the gambling industry

The conceptualisation of gambling harms, and regulation of the gambling industry are long-standing highly contested issues with markedly divergent policy discourses observed between policy actors (Cassidy, 2020). The gambling industry discourse sees harms as arising from an individual's misuse of gambling products and lack of personal responsibility, while the gambling industry itself is presented as a legitimate commercial actor (van Schalkwyk et al., 2021). The metaphor of balance plays a structuring role in the emergence and maintenance of this industry-favourable policy discourse in the UK. The passage of the Gambling Act (2005) delivered a paradigm shift in UK gambling discourses (Cassidy, 2020) and removed restrictions on gambling marketing, availability and accessibility. These restrictions had previously limited the ability of the commercial gambling industry to generate consumer demand for its products and services. The new Act placed a duty to 'aim to permit' gambling on the regulator and Local Authorities and was informed by a review of UK gambling laws described by Cassidy (2020) as 'the high water mark of gambling deregulation'. The review body explicitly stated that their recommendations were balanced in nature:

> Our proposals generally move in the direction of allowing greater freedom for the individual to gamble in ways, at times and in places than is permitted under current legislation. This move to greater freedom is balanced by rather tighter controls on the freedom of young people to gamble and by some tighter controls over those who provide gambling services.

The new industry-favourable policy regime redefined the industry as a legitimate commercial leisure sector that should be stimulated to grow, emphasised the primacy of consumer choice, and accepted the industry analysis that harms arising from gambling were due to the faults of individuals and limited to a small minority of the population. The key policy challenge was articulated as navigating the 'fine' balance between ensuring gambling is fair, crime-free, and that 'the vulnerable' are protected while promoting 'consumer choice' and encouraging the industry to grow and innovate (Department for Culture, Media and Sport, 2002). The very purpose of gambling policymaking was thus framed in terms of balance. The notion of balance signalled an appeal to a logic of modernisation; that 'relaxation of outdated restrictions and extension of choice for adult gamblers' could be 'managed' using counterbalances of 'responsibility and protection for the vulnerable' (Department for Culture, Media and Sport, 2003). However, the counterbalancing measures were largely favourable to industry interests, namely: industry-funded research, education and treatment and a code of conduct based on industry corporate social responsibility initiatives.

Through the metaphor of balance, the industry-favourable gambling policy discourse reduced the interests of the gambling industry, the right to gamble and harms to individuals and society as quantifiable entities that can be weighed against each other. This in turn facilitated the 'metaphorical redescription' (Howarth and Griggs, 2006) of the industry as a legitimate policy actor, on equal footing with other interest groups. It cast the industry in a different moral light from previous policy discourses in which its pursuit of profit, through the stimulation of gambling, was defined as the problem to be regulated rather than an economic opportunity to be fostered.

Gambling industry actors themselves embraced the discourse of balance, using the metaphor to argue for further deregulation and against the need for strengthening of governmental oversight. Gambling restrictions were presented as 'over regulation' that would lead to an imbalance and unjustified infringements on consumer enjoyment. When responding to the House of Commons Culture, Media and Sports Committee's 2012 inquiry into the impacts of the Gambling Act (2005), some industry actors argued that balance had not been achieved and what had instead transpired was a regulatory regime that was skewed towards restrictive regulation of the industry:

> we are confident with the statement that the Act has had little or no impact on levels of problem gambling, either negatively or positively … Finally we would want to confirm our view that far too much focus has been placed on this issue and it is disproportionate to any perceived harm and does not balance legitimate commercial interests with protecting the vulnerable (Gala Coral Group, 2011).

When consulting on the regulation of different gambling machine categories, the Government called upon stakeholders to submit evidence, explaining that their objective was to 'look across the industry and determine what, if any, changes are needed to strike the right balance between socially responsible growth and the protection of consumers and wider communities' (Department for Culture, Media and Sport, 2016). In response, industry actors sought to define 'striking the correct balance' as recognising the existence of a naturally functioning 'demand-led' market, thereby obscuring the role of normalization, marketing and addictive product design (William Hill, 2016).

Reaching the right regulatory balance, it was argued, should be a depoliticised process, not influenced by 'extreme' views or certain lobby groups. However, such arguments were often contradictory in nature, calling for a focus on promoting the gambling industry's interests and making political statements about what the role of the gambling regulator *should* be. For example, the industry-led GREaT Foundation, tasked with raising voluntary funds from the gambling industry for research, education and treatment, stated in their submission to the House of Commons Culture, Media and Sports Committee's 2012 inquiry that:

> GREaT also believes that the process of regulation and deregulation should be as depoliticised as possible and that the Gambling Commission [the regulator] should be required to report annually to DCMS on the appropriateness of current regulations and any recommendations for new, removed or amended regulations. Such recommendations should seek to balance legitimate commercial interests with the need for public protection and should be evidence based (GREaT Foundation, 2011).

Similar contradictory statements were made by industry actors:

> The Gambling Commission needs to continue to evolve into a more modern, risk based, regulator which also advises government on evidence based policy changes, and acts as an advocate for the industry that it regulates, […]. This will also help to depoliticise gambling policy (Gala Coral Group, 2011).

In line with gambling operators, the industry-funded charity called upon the Committee to 'urgently [address] the current damaging imbalance between allowing legitimate and responsible gambling companies to grow and thrive as part of a modern economy and social protection' (GREaT Foundation, 2011).

In response to the threat of stronger regulations posed by the UK government's review of the Gambling Act (2005) launched in 2020, gambling operators called for an evidence-led approach to ensure 'the right balance' of regulation was struck. The Betting and Gaming Council, representing most of the major land-based and online operators, reproduced the discourse of balance:

> We are pleased that ministers have pledged to take an evidence-based approach, and to ensure that the right balance is struck between protecting the vulnerable and not spoiling the enjoyment of the vast majority who enjoy a flutter as part of their leisure time (Dugher, 2021).

Use of the balance discourse enabled the industry to maintain a vision of policymaking as a technocratic process which could only achieve balance if all voices were heard and given equal weight, regardless of the legitimacy of their claims to be participants in decision-making processes and the nature of their policy objectives. Through this

discourse, advocates for reform in the interest of public health who sought to reframe the industry as the problem were cast as prohibitionist and posing a threat to the balance between freedom and protection:

> It is clear from claims by campaigners that sponsorship bans are seen as 'just the start' to a wider blackout on the industry – this should be an issue for all of us committed to a long-term sustainable future that balances customer protection with customer freedom (Banbury, 2022).

The gambling industry thus employs the metaphor of balance to reproduce a policy discourse favourable to its interests, that by being 'evidence-led' and not pandering to 'extreme' views, the conflict between the growth of the gambling industry for economic gain and the protection of the public can be erased. The industry-favourable discourse sees it as self-evident that the commercial interests of the gambling industry are as important as the protection of people and communities from gamble harm. Deregulation is presented in terms of balance while a preferencing of precaution and safety (from gambling industry practices and products) is seen as a disruption of balance and legitimate rights. Industry-favoured policy measures are presented as 'counterbalances' to deregulation, concealing the reality that both sides of the metaphorical scales are in fact serving commercial interests and those dependent on industry-funding. Thus while the industry and its proponents explicitly call for a balanced, proportionate and evidence-led policy regime, what runs through these narratives are demands for less regulation and for the regulator to act as an advocate for the industry. In this way, the metaphor of balance serves to structure and legitimate a highly partial policy agenda that privileges commercial interests.

5.2. Addressing the 'epidemic of pain': the discourse of balanced pain policy

The US opioid crisis is recognised to have been fuelled largely by the pharmaceutical industry and a policy regime that failed to address the emerging epidemic and to effectively regulate the industry as a key 'vector'. Certain companies, and those in receipt of their funding, sought to embed the idea that the prescription of highly-potent opioid medicines was safe and effective for the treatment of non-cancer pain with minimal risk of addiction, despite an absence of robust evidence underpinning such claims (Keefe, 2021; Higham and Horwitz, 2022). The Pain & Policy Studies Group, at the University of Wisconsin played a key role in embedding this narrative. During this time, the group was in receipt of opioid industry funding and was actively engaged in activities to overturn state-level prescription monitoring programs and to promote opioid use in national-level prescription guidelines (Fauber, 2011). Members of the industry, aided by groups like the PPSG, played down the risks associated with expanded prescription of opioid-based pain relief while producing highly addictive products and actively influencing the prescribing practices of healthcare providers (Keefe, 2021; Fauber, 2011; Higham and Horwitz, 2022; Eisenkraft Klein et al., 2024).

The PPSG constructed an industry-favourable policy discourse which rested on the logic that 'balanced' pain policies – conflated with balanced opioid policies - were needed to ensure unhindered access to opioids for those requiring 'legitimate' pain management on the one hand, and to prevent 'misuse' of opioids on the other. This policy agenda was evident in the work of the PPSG that involved several activities including critiquing national and international laws and policy agendas from the perspective of balance, and establishing a scorecard system that enabled the assessment and ranking of state governments' achievement of balanced pain policies. As the host of a WHO Collaborating Centre for Pain Policy and Palliative Care, the group played a key role in the development of the 2000 WHO guidelines *Achieving Balance in National Opioids Control Policy* and the director of the PPSG later helped update these guidelines in 2011. In 2020 the WHO retracted these treatment guidelines due to concerns about pharmaceutical industry involvement in the drafting process (Dyer, 2020).

The PPSG constructed a discourse in which the achievement of balanced pain policy was articulated as the self-evident aim of prescription opioid regulatory regimes, and 'refers to international, national, and state policies that strive to ensure both the adequate availability of pain medication for patient care and the avoidance of their diversion and abuse' (Cleary and Maurer, 2018). While acknowledging the potential for misuse – framed in terms of mis-supply and misuse by individual physicians and patients – this was juxtaposed with an apparently 'dire need to improve [that is to say increase] the availability of opioids globally to relieve pain' (Cleary and Maurer, 2018). The objective was to remove 'barriers to legitimate access of prescription opioid analgesics' that were 'essential' for addressing the global under-treatment of pain and inequalities in access to pain relief (Cleary and Maurer, 2018). Throughout, balanced pain policy was also employed synonymously with balanced opioid policy. This concealed non-pharmacological options for chronic pain, instead equating chronic pain management with opioid availability. Pain policy was thus narrowly defined as being predominantly about ensuring increased and equitable access to opioids, marginalising a more wholistic and evidence-based understanding of what constitutes effective management of different forms of acute or chronic pain.

This discourse was evident in the 2000 WHO opioid prescription guidelines – that introduced the 'The Central Principle of "balance" […] to guide the development and implementation of international and national drug control policies' – and in the updated 2011 version. At the state level, the PPSG received a grant from the Robert Wood Johnson Foundation (Joranson, 2003) to develop a scorecard system to serve as a:

> tool that can be used by government and non-government organizations, as well as by policymakers, healthcare professionals, and advocates, to understand the policy in their state that reinforces the appropriate practice of pain management or that can hinder patient access to effective treatment (Pain & Policy Studies Group, 2014).

It was intended to facilitate 'scoring' of state pain policies, assigning them a grade from A to F, and producing state-by-state progress scorecards. These grades were solely associated with opioid availability, with an A constituting minimal restrictions on opioids and an F constituting significant restrictions. Based on their activities, the PPSG claimed that they had 'become the focal point for expertise on policy governing drug control and medicine and pharmacy practice related to opioid availability and pain relief' (Cleary and Maurer, 2018).

In addition to agenda-setting with scorecards, other practices of the PPSG revolved around embedding the concept of balanced pain policy within regulatory debates. This included, among other activities, congressional testimony in support of the Pain Relief Promotion Act in 2000 that drew specifically on the metaphor of balance (United States Congress, 2001). Their practices drew on wider emerging and well-grounded concerns among health and advocacy communities globally of the right to access quality pain management services and healthcare more generally (Cleary and Maurer, 2018). Yet the idea of balance promoted by the group within their various publications appears to be defined in a way which privileges unrestricted access over the avoidance of harm and the precautionary principle:

> Achieving more balanced pain policy means identifying and eliminating archaic medical concepts and restrictive provisions that impinge on modern pain medicine; it also means adding policies that recognize pain management as a part of quality medical practice (Gilson et al., 2007).

This framing defends the new forms of purportedly balanced opioid prescription through an appeal to modernity in terms of clinical and regulatory practise. As such the idea of balance is equated with progress and casting off traditional modes of thinking that have previously held us back and caused unnecessary pain and suffering. Similarly, while

there was a recognition of the potential for harm, this appears to be of secondary importance to the primary objective of facilitating access to medications for those in pain:

> to be "balanced," a state's policies should not have barriers, and should also contain provisions that support controlled substances and medical practice concerning pain management and palliative care. To be balanced, drug control policies will have a high potential to identify and address the specific sources of diversion and a low, perhaps zero, potential to interfere with legitimate availability of pain medications, medical practice, and patient care (Gilson et al., 2005).

There was little discussion about the harm potential for those accessing increasing doses of potent and highly addictive drugs via medical prescription. Greater patient access to opioids was presented as self-evidently beneficial, with any policy other than unregulated patient access constituting an imbalance. The focus on misuse also foresaw specific responsibilities for medical professionals and law enforcement actors, which was again described in terms of balance:

> The principle of Balance also is helpful in conceptualizing the appropriate roles and responsibilities of both health care practitioners and law enforcement officials when addressing pain management and the problems of drug diversion. The main role of practitioners is to treat pain, but they also must avoid contributing to medication abuse and diversion. Alternatively, law enforcement works to stop diversion, but, in doing so, must not interfere in medical practice and patient care. Thus, the principle of Balance provides a framework for recognizing what should be the common interests of health care and law enforcement: to understand and avoid interfering with each other's work to protect public health and safety (Gilson et al., 2007).

Absent from this is any sense of industry responsibility for harms through the reformulation and promotion of ever more powerful and addictive products to an ever-widening pool of recipients whose pain management needs were largely being defined through industry discourses. These definitions of balance imply that the 'risk' (one side of the balance equation) was illegal use/extra-medical use and diversion, while the 'benefit' (the other side of the balance equation) was widespread availability. This logic implied that restrictions should only seek to address extra-medical use, obfuscating that addiction via standard oral use to prescribed amounts (i.e. neither 'abuse' nor 'misuse') was actually the leading driver of opioid addiction (Manchikanti et al., 2010).

The idea of deregulation-as-balance and the liberalisation of access as inherently beneficial was evident in the efforts of the PPSG to promote their contribution to opioid policy:

> PPSG has contributed to the promotion of the principle of balance and the development of our unique model of technical assistance to help national governments assess regulatory barriers to essential medicines for pain relief and amend existing, or develop new, legislation that facilitates appropriate and adequate opioid prescribing (Cleary and Maurer, 2018).

The allusion to 'essential medicines' presents unrestricted opioid availability as a technical and evidence-based strategy yet conceals important nuances. The most commonly prescribed opioid at the time, oxycodone (the generic form of OxyContin), is *not* on the World Health Organization's *List of Essential Medicines,* unlike fentanyl, morphine, and codeine (World Health Organization, 2021). Moreover, the presence of a medicine on the List does not relate to the extent to which it should be regulated or restricted. The reference to both 'essential medicines' and their 'unique model of technical assistance' is noteworthy also as it is in keeping with the preceding discussion of the function of the balance metaphor to present highly political forms of governance as technocratic or apolitical processes of weighing or scoring between competing actors and interests.

6. Discussion

The preceding analysis demonstrates the value of a comparative, micro-level analysis of the role of metaphors – in this case balance – in the construction of industry-favourable health-policy discourses in ways that build on and extend existing frameworks of corporate political strategies (Ulucanlar et al., 2023; Gilmore et al., 2023). Important similarities can be seen in the way the balance metaphor functions to shape perceptions of policy problems and mask the role of industry actors as the principal driver of harms through the promotion of their products and of ineffective regulatory regimes to govern them. Both gambling and opioid industry-favourable discourses, the former examined through analysis of national legislative processes and the latter through the activities of an industry-funded research group, present balance as both the self-evident and inherently beneficial goal that gambling and pain policy *should* seek to ensure and the method through which to achieve it. They define past policy regimes, aimed at restricting access to these products and curtailing commercial activities as archaic.

In both discourses, balance serves as an ideological cloak for a fundamentally partial, deregulatory agenda but which is presented in terms of even-handedness and fairness. The ambiguity and multiplicity of meanings and associations evoked by the balance metaphor is what makes it so powerful to those seeking to promote particular understandings of policy problems, responses and the policymaking process. It allows for appeals to dispassionate, technocratic forms of policymaking on the one hand, and normative assumptions about equity and fairness on the other, while acting to embed a specific policy regime that favours commercial interests over public health. The balance metaphor evokes physical entities that must be weighed against one another, obscuring the fact that policy decisions involve competing values – access and restriction, personal choice and social protection – which have no common scale against which they can be measured and weighed (see Stone, 2012).

Differences were also identified in the functions and consequences of the balance metaphor in each case. Notably, the PPSG appeared more prescriptive in their practices to support achieving 'balanced' policy regimes. This is most evident in their efforts to develop the policy scoring system and the issuing of US State scorecards documenting their progress towards achieving unrestricted opioid policies masquerading as 'balanced' pain policies. The policy discourse of the gambling industry and its proponents was more nebulous as to what constitutes a so-called balanced policy approach. Differences in practices are in part likely to reflect the nature of the policy problem and wider context as well as the differences in the types of actors and processes captured by the documents.

Our analysis resonates with the findings of Patterson and Lee (1997) and Moosavian (2015), namely,the role of balance in appealing to the notions of technocratic, objective policymaking, fairness and the resolution of conflict, while obscuring the political and subjective nature of decision-making. We add to this literature by examining the role of balance in two new policy areas, and in the construction of industry-favourable discourses specifically. A focus on balance as a marker of 'good' policy runs the danger that the concept itself becomes reified as a key outcome or objective to be sought in policymaking, in ways analogous to the pursuit of centrism or a 'middle ground.' This could lead to a situation in which delivering balance in both process and outcome crowds out or conceals the legitimate pursuit or prioritising of specific social values, such as health and safety, over others, such as economic growth. At times, a 'balanced' outcome between two sets of concerns or interests is not a legitimate goal or consistent with effective policymaking. Simply because interests are asserted – often vociferously by powerful policy actors – does not mean that they are normatively equivalent to other priorities, or should be seen as comparable, as the discourse of balance assumes. This is not to say they should be dismissed

out of hand. At times, navigating trade-offs between different objectives, described through the concept of balance (or alternatively 'invoking the metaphor of balance'), is a sensible and justifiable policy objective to pursue. The point is rather that balance should not be adopted unquestioningly as a policy objective or as a natural, 'common sense' approach to the resolution of policy disputes. Instead, policy actors should critically engage with rhetorical appeals to balance, to render explicit what often remain implicit in its use and assess the relevance and legitimacy of balance as an objective in the context of each specific policy debate.

Our analysis also builds on studies that document industry strategies aimed at embedding commercially favourable approaches to policymaking (Smith et al., 2015; Fooks, 2022; Lauber and Brooks, 2023). For example, previous analyses of meta-regulation, 'the rules that govern the rules' (Morgan, 2003), illustrate how commercial actors like the tobacco industry promote and exploit particular ways of *governing* and *making* policy, including formalising the use of impact assessments based on cost-benefit analyses and stakeholder consultations under the rubric of 'Better Regulation' (Lauber and Brooks, 2023; Smith et al., 2015). These studies signal the value of going beyond a focus on specific policy proposals and topic areas to study the functions played by 'the wider policymaking infrastructure', and the ideas and norms underpinning these, in promoting corporate interests (Lauber and Brooks, 2023). Our findings contribute to this agenda by showing how particular ways of *conceptualising* and *explaining* policymaking fostered by specific metaphors can function to advance industry interests, helping to legitimize and normalize the adoption of specific forms of meta-regulation.

6.1. Study limitations and implications

This study was limited to the analysis of documentary materials obtained from two distinct projects focusing on two specific contexts and groups of actors. Further studies are needed to establish the permeation and functions of the balance metaphor in industry-favourable policy discourses more broadly. Further research could help to examine the impact of the balance metaphor on public opinion, use of visual metaphors by corporate actors (Thibodeau et al., 2019) and outcomes of efforts to challenge and replace metaphors as part of the wider literature on countering industry influence of policymaking (Katikireddi et al., 2014).

It is important to note that we are not making claims that there are right or wrong metaphors or against the inclusion of multiple stakeholders in policy debates and the pursuit of realising co-benefits to policy outcomes. Similarly, we also do not wish to imply that opioid-based treatments can never form part of effective pain management. Instead, we aim to highlight the importance of identifying the metaphors that are used in the construction of policy discourses and how they function to favour the attainment of commercial goals at the expense of public health policy agendas. We argue that ignoring the use of metaphor forecloses scrutiny of an important element of the practices employed by industry, indeed any policy actor, in their attempts to shape reasoning about problems and proposed solutions.

The unquestioning use of deeply embedded metaphors, such as balance, risks foreclosing important opportunities to cultivate new and productive ways of understanding policymaking that help expose and explain corporate power. This approach may help to resolve policy dilemmas and tackle the underlying social problems they seek to address. Policy discourses are needed that foreground the trade-offs between competing social values and struggles over meaning, problem definitions and evidence in ways more aligned with theories of policymaking and democratic decision-making. Alternative metaphors can be found in the fields of public policy and political science that characterise policymaking, for example, as a 'competition' or 'conflict' between 'rival opinions' and 'opposing interests' (Parkhurst, 2016) and policy as a 'web of decisions and actions that allocate values' (Easton, 1953). Metaphors shape thinking and action, and the identification of effective and persuasive metaphors should be seen as an important element of addressing the CDOH.

7. Conclusion

There is a need to problematize the role of the balance metaphor in health policy discourses. It has become so embedded in public discourses and reasoning that it has in some cases come to represent what policymaking *is*. In this way it can be used to construct industry-favourable discourses that are largely seen as incontestable and necessary. It is important to question whose interests are served by the balance metaphor as a way of reasoning about gambling and opioid policy and policymaking and offer other metaphors that may be more effective in foregrounding the threat posed by vested interests and in achieving public health goals. Shining a light on the metaphors used in policy debates and their functions reveals important insights that can be used to inform the construction of counter-narratives to industry-favourable discourses, including the creative use of novel metaphors in service of public health goals.

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Ethics statement

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CRediT authorship contribution statement

May CI. van Schalkwyk: Conceptualization, Data curation, Formal analysis, Methodology, Writing – original draft. **Benjamin Hawkins:** Conceptualization, Data curation, Formal analysis, Writing – review & editing, Methodology. **Daniel Eisenkraft Klein:** Conceptualization, Data curation, Formal analysis, Writing – review & editing. **Adam D. Koon:** Conceptualization, Data curation, Formal analysis, Writing – review & editing.

Declaration of competing interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

Data availability

All data, except for those obtained via freedom of information requests, are publicly available. All remaining data can be made available upon reasonable request.

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