

**RESEARCH ON ORGANIZATIONAL DISCOURSE: CHALLENGES AND
CONTRIBUTIONS***

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ABSTRACT

During recent years, the body of theory on organizational discourse has grown significantly, helping to form a specific field of study and also contributing to broader organization and management theory. During this time, empirical work using discourse analysis has also increased as organizational researchers have drawn on methods established in other domains of study to explore organizations. The study of organizational discourse is not without its difficulties, however, especially for researchers wishing to conduct empirical studies. This paper identifies some of challenges facing researchers and then describes how an ongoing program of organizational research using discourse analysis has attempted to address them. It also highlights some of the important contributions that empirical studies of organizational discourse can offer towards the understanding of organizational processes.

RESEARCH ON ORGANIZATIONAL DISCOURSE: CHALLENGES AND CONTRIBUTIONS*

Scholars are increasingly conceptualizing societies, institutions and identities as discursively constructed collections of texts and, in so doing, are focusing on language use as the central object of study (Alvesson & Karreman, 2000a). Such discursive studies are playing a major role in the study of organizations and in shaping some of the key debates that frame organization and management theory (Keenoy et al., 1997, 2000; Grant et al., 1998). The amount of empirical work using discourse analysis has also increased, as organizational researchers have drawn on methods established in other domains of study to explore organizations. The result is a divergent, and sometimes conflicting, range of approaches, from speech act theory to ethnomethodological conversation analysis to critical linguistics (Putnam et al., 1996; Woodilla, 1998; Putnam & Fairhurst, 2000; Phillips & Hardy, forthcoming). The empirical study of organizational discourse is, however, not without its difficulties, which need to be addressed as the field grows and evolves (Grant, et al., 1998; Alvesson & Karreman, 2000a).

This paper identifies four particular challenges facing empirical researchers. First, there are difficulties in collecting and analyzing data, as well as in incorporating other theoretical bodies of work. Second, studying organizational texts within their broader context can also be particularly problematic. Third, there is an ongoing – and unresolved – debate between structure and agency, which has particular implications for discourse analysis. Finally, the demands for more reflexive research can be hard for researchers to meet. These

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challenges make it difficult to conduct and publish empirical studies of organizational discourse and it is therefore important that researchers are aware of them and find ways to address them. Drawing on examples from an ongoing program of research on organizational discourse, this paper highlights how these difficulties manifested themselves in particular studies, and discusses some of the ways they can be addressed. In this way, it highlights both the challenges and contributions of empirical studies of organizational discourse as we use it to further our understanding of organizational processes.

This paper is structured as follows. First, an overview of organizational discourse theory is presented in order to clarify the methodological assumptions that underpin this body of work. Second, four key challenges are identified from the literature that complicate the work of empirical researchers. Third, a research program that has used discourse analysis in a number of empirical settings is described and the ways in which the challenges have impacted on this research is discussed. Finally, the contributions that empirical studies of discourse can make to organization and management theory are explored.

ORGANIZATIONAL DISCOURSE THEORY

Discourse refers to the practices of talking and writing (Woodilla, 1998), which bring objects into being through the production, dissemination and consumption of texts (Parker, 1992). For example, the discourse of strategy has introduced a series of management practices into organizations over the last fifty years (Knights & Morgan, 1991); the post-war discourse of human rights has brought about the contemporary idea of a refugee with rights to asylum (Phillips & Hardy, 1997); the discourse of AIDS has – in the developed world at least – empowered groups of patient-activists to take control of their treatment in ways rarely seen in the case of traditional patients (Maguire et al., 2001). Accordingly, we define a *discourse* as a system of texts that brings objects into being (Parker, 1992). Discourses are “concrete” in

that they produce a material reality in the practices that they invoke. They are embodied in *texts*, but exist beyond the individual texts that compose them. Consequently, *texts* can be considered to be a discursive “unit” and a manifestation of discourse (Chalaby, 1996).

Discourse analysis is the systematic study of these texts, which contain the clues to discourses that we can never find in their entirety (Parker, 1992). Texts might include written or spoken language, cultural artifacts and visual representations (Grant et al., 1998; see Wood & Kroger, 2000, p.68 for examples of different sources of data). Research on organizational discourse thus centers on the texts that compose, and are composed in and by, organizations (Putnam et al., 1996).

Texts are the sites of the emergence of complexes of social meanings, produced in the particular history of the situation of production, that record in partial ways the histories of both the participants in the production of the text and of the institutions that are ‘invoked’ or brought into play, indeed a partial history of the language and the social system, a partiality due to the structurings of relations of power of the participants. Kress, 1995: 122).

Discourse analysis explains how discourses are made meaningful (Alvesson, 1998) through discursive *activities* (also referred to as practices or events), which include the production, distribution and consumption of texts (Fairclough, 1995; Woodilla, 1998). This approach to discourse also pays attention to *interdiscursivity*, which focuses on how an individual text is constituted from diverse discourses (Fairclough, 1995), and *intertextuality* since “any text is a link in a chain of texts, reacting to, drawing in and transforming other texts” (Fairclough & Wodak, 1997: 262). Fairclough (1995) points out that textual analysis is insightful because texts constitute an important form of social action, a source of evidence for claims about social relations, and a sensitive barometer of ongoing social processes. They are also a means whereby social control is exercised and resisted.

There are a wide variety of methods of investigation that can be used to analyze discourse (Keenoy et al., 1997; van Dijk, 1997a, 1997b). To be considered discourse analysis, however, these methods must share particular assumptions regarding the nature of language.

[Discourse analysis is not only about method; it is also a perspective on the nature of language and its relationship to the central issues of the social sciences. More specifically, we see discourse analysis as a related collection of approaches to discourse, approaches that entail not only practices of data collection and analysis, but also a set of metatheoretical and theoretical assumptions (Wood & Kroger, 2000: x).

Specifically, discourse analysis is concerned with the constructive effects of texts and, as a result, is necessarily interpretative (Phillips & Ravasi, 1998). Discourse theorists assume that language does not simply mirror “reality” but, rather, it brings into being “situations, objects of knowledge, and the social identities of and relations between people and groups of people” (Fairclough & Wodak, 1997: 258).

The idea that discourse is the foundation of the process of social construction upon which social reality depends is nothing new (Berger and Luckmann, 1966). What is less commonly understood is *how* this reality is constructed and sustained (Chia, 2000). Discourse analysis focuses on how social reality is created through historically situated discursive moves (Alvesson & Kärreman, 2000b). Rather than trying to interpret social reality as it exists, discourse analysis endeavors to uncover the way in which social reality is produced (Phillips & Ravasi, 1998; Phillips & Hardy, forthcoming). It does not assume a pre-existing social object called an organization; instead it argues that discourse forms social objects – such as organizations – by fixing their identity so that it becomes possible to talk about them *as if they were* naturally existing social entities. In other words, the “apparent solidity of social phenomena such as ‘the organization’ derives from the stabilizing *effects* of generic discursive processes rather than from the presence of independently existing concrete entities” (Chia, 2000: 514). In this way, discourse analysis is not simply a collection of methods, but a *methodology* based on a radical constructivist epistemology (Wood & Kroger, 2000; Phillips & Hardy, forthcoming),

Discourse analysis thus investigates systems of texts and the concepts, objects, and subjects that they constitute (Fairclough, 1992). To understand these constructive effects,

researchers must locate discourses historically and socially. They must also acknowledge that discursive activity does not occur in a vacuum nor do discourses “possess” meaning. Instead, their meanings are created, supported and contested through the production, dissemination and consumption of texts, and emanate from interactions between the social groups and the complex societal structures in which the discourse is embedded. To understand discourses and their effects, therefore, we must also understand the *context* in which they arise (Sherzer, 1987; Van Dijk, 1997a).

Discourse is not produced without context and cannot be understood without taking context into consideration.... Discourses are always connected to other discourses which were produced earlier, as well as those which are produced synchronically and subsequently (Fairclough & Wodak, 1997: 277).

By studying the larger context – how it shapes and is shaped by discursive activity – the study of discourse becomes “three dimensional” as the discourse is located historically (Fairclough, 1992; 1995).

This interest in text and talk in context (Van Dijk, 1997a) sees organizations “not simply as social collectives where shared meaning is produced, but rather as sites of struggle where different groups compete to shape the social reality of organizations in ways that serve their own interests” (Mumby & Clair, 1997: 182). Discourses make certain behaviors possible and, in so doing, constitute “reality” (Deetz & Mumby, 1990) through the interplay of multiple discourses that pertain to any individual setting (Grant et al., 1998). Some discourses and meanings may become so privileged and taken for granted that they are reified, but there is always a struggle for “closure”. Power relations that appear fixed (Clegg, 1989) are really the result of ongoing discursive struggles whereby meaning is negotiated (Mumby & Stohl, 1991; Van Dijk, 1997a) in ways that create particular objects of knowledge, identities and relationships (Parker, 1992; Fairclough & Wodak, 1997). In other words, organizational discourse theory does not deny that some discourses may dominate, but

it maintains that such dominance is an ongoing struggle among competing discourses, continually reproduced or transformed through day-to-day communicative practices.

In summary, organizational discourse theory focuses on the constructive effects of discourse – how discourses bring reality into being by making social relations and material objects meaningful – through the study of texts, and their production, dissemination and consumption. Discourse analysts are thus interested in the conditions that shape what may be said, who can speak within socially organized settings, the ways in which reality claims are made and the social practices that are invoked (Fairclough, 1992; Miller, 1994).

CHALLENGES IN CONDUCTING EMPIRICAL RESEARCH

The literature on organizational discourse, as well as discourse theory more generally, has identified a number of challenges facing researchers. In this section, we discuss four challenges discussed in the literature, which are particularly important for researchers trying to conduct empirical studies, because they make conducting and publish discourse studies more difficult.

Data and Theory

There are a number of difficulties associated with data collection and analysis, as well as the role of theory. First, discourse studies are typically labor-intensive and fraught with sampling problems (Putnam & Fairhurst, 2000). Organizations produce an inordinately large numbers of different types of texts, making it difficult to choose *which* texts to analyze (and also to justify that choice to reviewers). Even when particular texts are selected, the task of analyzing them still remains. When both context and text are studied, the challenge is even greater since different methods may be needed to explore the context compared to the text. For example, some writers argue that textual analyses should be complemented with other forms of analysis, such as ethnographies or interviews (Miller, 1994; Fairclough, 1995). In

addition, some writers criticize the lack of rigor and systematic analysis, arguing that discourse analysis is too subjective, while others argue that too much systematization in data analysis is likely to induce reification (see Burman & Parker, 1993). Discourse analysis is designed to identify (some of) the multiple meanings assigned to texts, which means that more systematic, labor-saving forms of analysis (such as traditional context analysis) are counterproductive, increasing the workload of researchers as well as making the defense of the methodology more difficult.

Second, researchers face the choice of whether to conduct more theoretically informed work or to let the data drive the research. Some writers challenge the very idea that we should connect studies of discourse to broader theoretical frameworks and that we should instead allow the data to “speak for itself”; while others argue that studies in which theory “floats disconnected from any political position” raise problems of relativism (Burman & Parker, 1993: 167). For example, Parker (2000: 519) argues that research that is undertaken simply to “understand” a phenomenon, and which is not informed by theory, makes it difficult to consider ways in which it might be changed, leaving the “So what?” question, often asked by reviewers, difficult to answer. Another problem with studies that fail to connect to other bodies of theory is that organizational discourse theory is far from the academic mainstream and many reviewers do not find it interesting unless it contributes to the broader aspects of organization and management theory (Phillips & Hardy, forthcoming).

In summary, researchers face the task of selecting and analyzing texts in ways that allow them to conduct their research (and, given the labor-intensive nature of the research, within sensible timeframes) and to defend the methodological choices they have made. They also must choose whether and how to relate discourse studies to other theoretical work in the broader field of organization and management theory.

Text and Context

Another challenge facing empirical researchers concerns the extent to which they focus on text or context. Despite calls for three-dimensional studies (e.g., Fairclough, 1995; van Dijk, 1997a), empirical studies tend to concentrate more closely on either the broad social context or on a particular piece of text (Keenoy et al., 1997; Phillips & Ravasi, 1998; Phillips & Hardy, forthcoming). One reason is undoubtedly the additional demands of collecting and analyzing data on text and context (van Dijk, 1997a). However, researchers who focus on text risk the criticism that they have failed to adequately historicize their data (van Dijk, 1997a) and are ill equipped to explore the performative aspects of language (Burman & Parker, 1993). On the other hand, in trying to convey context, critics argue that researchers go too far “beyond” the particular text and are at risk of putting words – or meaning – into the mouths of others by privileging their interpretation of the context (Burman & Parker, 1993; Alvesson & Karreman, 2000a). In addition, they may be accused of reifying context (Alvesson & Karreman, 2000a), when “contexts, just like discourse, are not objective in the sense that they consist of social facts that are understood and considered relevant in the same way by all participants. They are interpreted or constructed and strategically and continually *made* relevant by and for participants” Van Dijk (1997b: 16).

Trying to balance text and context does not necessarily solve the problem because there are inherent tensions associated with these levels of analysis. For example, Alvesson & Karreman (2000b) identify four different types of study. *Micro-discourse* studies make a detailed study of language in a specific micro-context. *Meso-discourse* studies are relatively sensitive to language use in context, but are interested in finding broader patterns that might be generalized to other contexts. *Grand discourse* studies are interested in an assembly of discourses that are ordered and presented as an integrated frame, such as culture. *Mega discourse* studies typically addresses more or less standardized ways of referring to certain

phenomena such as business reengineering, diversity or globalization. These authors argue that there is a tension between these levels: localized studies treat discourse as an emergent and locally constructed phenomenon, while the macro studies tend to start from well-established *a priori* understandings of the phenomenon in question. It is not easy to accurately account for both in the same study.

In summary, organizational discourse researchers are exhorted to explore the linkages between text and context, and to locate textual analyses in a broader setting. To accommodate text and context within a single study is, however, relatively difficult to achieve.

Structure and Agency

Another challenge stems from the on-going debate concerning the role of structure and agency (e.g., Giddens, 1984; Whittington, 1992). This longstanding debate is not confined to discourse analysis or even to organization and management theory (e.g., Sewell, 1992). Nonetheless, it has a particularly important impact on discourse theory because of the strong influence of Foucault's work, which has promoted an agent-less conception of discourse (Reed, 1998). This view rejects the idea that discourses, and the practices and structures they constitute, are "the direct expression of strategies of control and domination pursued by identifiable individuals, social groups, classes and movements within a wider historical and institutional context" (Reed, 1998: 197). It downplays the scope and limits of individual resistance (Burman & Parker, 1993) and sees power as inescapable (Reed, 1998). Other writers reject this view, arguing that the inherent fluidity of discourse means that discourses are *always* subject to resistance (Fairclough, 1995). While some discourses may appear to dominate and some meanings may be privileged, fixation is only ever partial (Laclau & Mouffe, 1985). Reed (2000) argues that we should reject the prevailing Foucauldian view of discourse, which asserts that there is nothing outside discourse apart from more discourse. He argues instead for a critical realist approach that acknowledges

that discursive activity occurs within a pre-existing structure of material, social and discursive relations. In this way, researchers are in a position to differentiate between “open doors” – scope for agency – and “brick walls” – the immovability of structure.

However, researchers who privilege either structure or agency face criticism:

The explicit or implicit identification of intentional agents manipulating discourses or engaging in discursive strategies (because there is an inadequately theorized notion of resistance and discursive position) smacks of a voluntarism that tends also towards cognitivism. On the other hand, the conception of discourses as if they were “tectonic plates” whose clashes constitute subjectivity can present so distributed a notion of power that there is no room for agency, thus also lapsing into mechanistic explanation (Burman & Parker, 1993: 163).

Some writers have argued that the solution is to accommodate elements of both positions. For example, Tsoukas (2000: 531) suggests that both realists and constructivists are correct – there is a social world outside our minds, but it is constructed by socially defined, language-based categories. He argues that both sides can be reconciled if we accept that “social reality is causally independent of actors” and, at the same time, what constitutes social reality “depends on how it has been historically defined” by the “the cultural meanings” that have been applied to it. However, as the continuation of the structure-agency debate in the social sciences generally, let alone in organizational discourse theory, suggest that the difficulties in theorizing – let alone empirically studying – the complex recursive nature between structure and agency have yet to be satisfactorily overcome (Burman & Parker, 1993).

In summary, another challenge facing researchers concerns the degree to which they believe material and social constructions are constrained or facilitated through discursive activity. In attempting the difficult task of incorporating recursive relations between structure and agency into their studies, empirical researchers may be in a position to differentiate between the “discourse driven subject” and “the discourse-teflonic subject” (Alvesson, 1998).

Reflexivity and Pragmatism

A final challenge relates to the call for “reflexive” research, which involves reflecting on the ways in which research is carried out and understanding how the process of doing research shapes its outcomes (Clegg & Hardy, 1996; Holland, 1999). Given that discourse analysis is concerned with the constructive effects of language, researchers are exhorted to remind themselves that all empirical data are the results of interpretation and that “knowledge” is a collective endeavor involving the researcher and research community (Linstead, 1994; Hardy et al., 2001). There are a number of ways to enhance reflexivity, including explicitly acknowledging that language constructs reality rather than simply revealing it; grounding research in historical processes; allowing different voices to pervade the text; acknowledging that not all possible voices are expressed, nor are the voices that are present expressed on equal terms; surfacing multiple meanings; and avoiding rhetoric and convention (Phillips & Hardy, forthcoming). By adhering to guidelines as these, empirical work is more likely to be attentive to the power relations between the researcher and the researched, and to remember the fact that analysts are not only readers, but also producers of discourse (Burman & Parker, 1993).

What would the polyphonic text look like? A text where multiple meanings permeate the story? Here, I am the one who is authoritarian in synthesizing the multiple voices into this monology you are reading. It seems as if we cannot avoid what Geertz (1988) refers to as ‘the burden of authorship’. So with the authority of being the author, most of the time it is my own voice which is doing the telling in this text. And when other voices are heard in the text, I of course have used my power to choose quotes, to edit the text, and so on. Even though my construction of this story partly aims at creating a sense of the multiplicity of meanings in organizations, at the same time I am inevitably creating a sense of order (Salzer-Mörling, 1998: 115).

In summary, reflexivity is an important component of discourse analysis and researchers should pursue ways of enhancing the reflective nature of their work. At the same time, these guidelines pose researchers with additional burdens as they struggle to write up and publish within traditional normal academic norms. Most of the work on reflexivity is

theoretical in nature and we need to find ways of integrating reflexivity into empirical work on organizational discourse. Unfortunately, our task is made harder by the fact, while we attempt to interrogate the constructive effects of language, we have only language at our disposal to express our understanding of its organizational character (Alvesson & Karreman, 2000a,b; Chia, 2000), and we work within the highly institutionalized discursive practices of our research community (Hardy et al., 2001).

A RESEARCH PROGRAM ON ORGANIZATIONAL DISCOURSE

Together with a number of colleagues, the author has been engaged in a series of studies of organizational discourse (Hardy & Phillips, 1999; Hardy, Lawrence & Phillips, 1998; Hardy, Palmer & Phillips, 2000; Hardy, Phillips & Clegg, 2001; Lawrence, Phillips & Hardy, 1999a; Lawrence, Phillips & Hardy, 1999b; Maguire, Phillips & Hardy, 2001; Phillips & Hardy, 1997; Phillips, Lawrence & Hardy, 2000). As a result, we have personally encountered the challenges described above. This section presents an overview of the research program (Table 1) and presents some of the reasons why we adopted discourse analysis. It then examines our experiences of the challenges associated with this methodology, and describes some of the ways in which we tried to address them.

— *TABLE 1 NEAR HERE* —

This research program has involved empirical work on organizational discourse in a variety of different settings: refugee systems in Canada, Denmark and the UK, a non-government organization (NGO) operating in the West Bank and Gaza, employment service organizations in Western Canada, the whale-watching industry in British Columbia, and the Canadian HIV/AIDS treatment domain. The work originally commenced in 1994 as part of a research program involving a critical study of interorganizational collaboration. At that time, we were interested in the role that power played in shaping collaborations and in how the

effects of collaboration, often presented in the organizational and management literature as a “good” thing, were often intensely political. We drew on a variety of theoretical frameworks, including institutional theory, trust, and domain theory to explore these processes (e.g., Hardy, 1994; Hardy et al., 1998; Hardy & Phillips, 1998; Lawrence & Hardy, 1999). This work helped to explain the social and political nature of these interorganizational relationships (i.e., how they existed), but it did not help us understand how they came into being or to identify the processes that held them in place (i.e., how they came to exist). As we considered this second question, we engaged in an explicitly discursive approach.

Data and Theory: Our Experiences

The problems discussed earlier, which related to selecting texts, analyzing large amounts of data and linking data to theory, certainly impacted on our work. In dealing with these issues, we tried to collect multiple forms of data, develop convincing ways of analyzing data, and to link data to other bodies of theory.

Data Collection

We have collected data from a variety of different types of texts. We have conducted interviews in all our studies – both in order to understand context but also as data on discursive activity. In many respects, this part of our research constitutes a traditional qualitative methodology. For example, in the refugee study we selected the research sites – the three countries – on the basis of theoretical replication i.e., the expectation of contrary results that can be explained with reference to theory’s predictions (Yin, 1984). These three countries had very different approaches to refugee determination and settlement and thus represented contrasting contexts in which theoretical issues were relatively transparent (Eisenhardt, 1989). We then conducted 86 interviews between 1990 and 1995. Interviewees were identified by contacting the key organizations in each country, for example, the refugee

council, the government department that was responsible for determination, and refugee activist organizations. In addition, informal contacts helped to identify other interviewees.

We also explored naturally occurring text and talk. For example, in our study of the NGO in the West Bank and Gaza, we are in the process of analyzing a significant amount of organizationally produced texts, including reports plans, newsletters, brochures, and memos. In examining a workshop on collaboration for employment service organizations, we used observation to collect data on how the organizations engaged in the workshop. In studying whale-watching, we have referred to films and novels. In another study, we examined 127 cartoons on refugees and immigration, which provided a useful source of data for a number of reasons. First, cartoons have used to explore a variety of concepts and objects, including the economy (Emmison, 1986), bi-lingualism in Quebec (Morris, 1991), political regimes (Press, 1981), and organizations (Collinson, 1988; Rodrigues and Collinson, 1995). Second, cartoons are publicly available and relatively easy to gather. Third, political cartoons encompass different perspectives – from democratic checks on the abuse of executive power (Press, 1981) from jesters of the bourgeoisie (Morris, 1989). Similarly, humor has been seen both as a conservative (Mulkay, 1988) and a liberating (Douglas, 1975) force in society; as well as a means of domination (see Rodrigues and Collinson, 1995) and a form of resistance (Roy, 1958) in organizational settings. As a result, cartoons often bring opposing discourses together and speak from multiple subject positions. Finally, cartoons are relatively self-contained texts that portray concise representations of alternative discursive positions that can be easily coded and interpreted (Morris, 1989, 1991).

Selecting particular texts from the vast array of texts produced by and about even a single organization is always problematic. We have tried to make our choices based on both pragmatic and theoretical grounds to enable us to make a defensible case to reviewers. For example, we chose to study immigration cartoons between 1987-1989 because two important

pieces of legislation concerning refugee determination and immigration passed through the Canadian Parliament during this period. As a result, we expected to find a relatively large number of editorial cartoons that would reflect not only on refugees, but also immigration generally. In the case of the West Bank NGO, we were able to access a large – but manageable – number of texts through our relationship with the manager and because it was a small organization.

Data Analysis

Data analysis is a highly labor-intensive task and, because discourse analysts are interested in interpreting multiple meanings, there is no shortcut way of applying systematized content analysis. Consequently, our approach to analysis strongly resembles the idea of “craft” advanced by Richard Daft (1983; see Phillips & Ravasi, 1998). For example, in the cartoons study, coding was an iterative process as the two co-authors first ascertained which objects were constructed in each cartoon. We found that each cartoon represented one or more of four objects: the refugee, the government, the immigration system and the public. In a second step, we examined how each cartoon constituted these objects. While the identification of the four objects had been relatively straightforward, identifying these themes took more time. We first jointly took a sample of cartoons to discuss the particular themes that each involved. We then established broad parameters concerning each of these themes and an understanding of how we might identify additional themes. We then individually coded all the cartoons, listing the themes we considered to be associated with each. We then compared our listing of themes, and revisited each cartoon, talking through any themes where we disagreed. Through this process, we refined the list to 18 themes presented in Table 2.

— *TABLE 2 NEAR HERE* —

In the study of the West Bank NGO, we had to develop a similarly customized approach. We had already constructed a chronological narrative of the case study (e.g.,

Eisenhardt & Bourgeois, 1988; Dougherty & Hardy, 1996) that raised an interesting discursive event related to the strategy of localization being implemented by the NGO's manager.

Localization is a process whereby regionally based operations, administered and funded by an international NGO, are transformed into a local NGO. The localized organization typically has a steering committee comprised of representatives from the local community and is responsible for securing its own funding. Having undertaken a number of steps to start the process, in September 1996, the manager called together a number of individuals whom he felt might become members of the prospective steering committee. The following month, he announced the layoff of 15 employees. Despite lacking any formal authority, the members of the steering committee met, in his absence, to discuss the matter and issued a statement saying the employees should be reinstated. The security forces then called in two Palestinian managers, and threatening imprisonment and torture unless they reinstated the employees.

By this stage, it was clear that the organization had "become" a local NGO in the eyes of the community, even though it remained under the formal control of the international NGO. As a result, its employees lost the political protection afforded by the status of an international agency. In order to protect his employees from further harassment, the manager engaged in a number of discursive activities designed to re-establish the status of the organization as an international agency with its political connections and financial clout. He sent out a series of letters invoking the international organization to other NGOs, the Palestinian National Authority and the security forces. He also disbanded the steering committee. By the end of November, the manager had received reassurances from members of the Palestinian National Authority that employees were safe from further action by the security forces and the organization once again "became" an international NGO.

This moment of crisis (Woodilla, 1998) represented a discursive "event" that we could use to focus our analysis. To commence our analysis, we catalogued the texts that we had

collected according to their date and genre (Yates & Orlikowski, 1992; Orlikowski & Yates, 1994) of each, building a “database” of over fifty texts, including organizational reports, letters, faxes, memos, handwritten notes, newsletters, and brochures. We then commenced a more intensive analysis of the texts pertaining to the intervention of the security forces, which consisted primarily of letters, sent out by the manager. Having noted the recipient of each text, the three co-authors jointly began to code the text line by line, with the idea of incorporating a focus on both text and context. We commenced by classifying the specific speech act reference – whether the text was trying to justify, empathize, correct, explain, or threaten. We matched this microanalysis with broader, institutional references, noting concurrent line-by-line references to such broad discourses as managerialism, industrial relations, progress, etc. As we engaged in this coding process, we realized that the texts also drew upon an intermediate category of object, namely the local relations or objects such as the manager, the local organization, the national organization, employees, or particular work teams. We began to incorporate this third level of coding in order to explore how the discursive activities of the manager produced particular forms of NGO.

Theory

As far as theory is concerned, if hypothesis testing is at one end of the continuum and grounded theory is at the other, our approach would be somewhere in the middle. We typically enter the field with a framework that points us in the direction of finding the interested use of power by actors that shows up in discursive activity. Within these broad parameters, we have tried to use our data and findings to yield insights into different theories. Our work has used discourse analysis and theory to build on more “mainstream” theories, such as trust, power, institutional theory, institutional entrepreneurship, identity theory and structuration theory.

Our reasons are two-fold. First, the use of discourse analysis has generated ideas that have helped us gain greater insight into these other bodies of theory. For example, a lot of our work seems to lend itself to ideas of agency, which has been identified as an important issue in institutional theory, which has previously been accused of focusing on pressures for conformity. Our interest in discursive construction also fits with other bodies of theory on the social construction of institutional fields and interorganizational domains. Similarly, in carrying out the study on the Canadian HIV/AIDS treatment domain, who trusted whom (and who didn't) was very clear from our data and, so, we pursued this theme in a paper explicitly on trust. Second, reviewers and editors are often suspicious of discourse analysis, which is still relatively unfamiliar to many organization and management theorists. It is far easier to persuade them of the value of an empirical study that contributes to and builds on more familiar work than trying to sell a self-referential piece of work on and about discourse.

To conclude, data collection and analysis has been highly labor-intensive – a state of affairs that is largely unavoidable. We have therefore resigned ourselves to collecting lots of texts to try and understand complex discursive processes. Data analysis has also been time-consuming, involving two or three researchers for days at a time in trying to ascertain and refine codes. It has also been a very “slippery” process – rather than applying a rigorous or standardized set of codes to the data, our search for meanings has been a highly subjective and customized process as we have worked out categories through our engagement with the particular data. One important challenge has been to present the reasons behind the selection and analysis of data in ways that are convincing to reviewers – either in terms of events in the particular case study or in theoretical terms. One way to make that task easier is to relate findings to other literatures and to explain how discourse analysis contributes to other work.

Text and Context: Our Experiences

Like many other researchers, we have also struggled with the tension between context and text. In many respects, our aim has been to include both i.e., to contextualize discursive activity by linking text and context. Because our work started with a study of collaboration in interorganizational domains, we acquired a rich knowledge of the contexts – refugee systems, the Canadian HIV/AIDS treatment domain, the NGO sector in the West Bank and Gaza, the whale-watching industry in British Columbia – as a result of this earlier work. It was inevitable that we would draw on these understandings to enhance our subsequent research on the discursive struggles within these contexts. For example, our earlier work on refugee systems helped us to understand the nature of the three national contexts. We then became interested in the discursive activities that helped to *construct* these contexts and our attention turned more specifically to discourse analysis.

We first wanted to explore how different organizations influenced refugee identities by engaging in discursive activities and how this helped to construct a particular type of refugee system – one in which government determination processes were an “obligatory passage point” (Laclau & Mouffe, 1985) and where NGOs “spoke” for refugees. We decided to focus on the UK refugee system, where there was visible evidence of a struggle between the government, NGO and refugee organizations around these issues and we selected four organizations that had very different agendas pertaining to refugee issues. We conducted a more intensive analysis to identify the discursive activities of these organizations, and relating them to different refugee identities and to organizational interests. It showed that the main actors, or subject positions, in the refugee system had a stake in the struggle and acted discursively to support it. For example, the government, which was in the “business” of determination, juxtaposed deserving refugees against the “economic migrants” that had to be unmasked by the determination system. The white-led NGOs that advocated on behalf of

refugees were in the “business” of service provision, which was enhanced by refugees as needy “clients” to whom they could dispense services. Refugee organizations were in the “business” of self-help, which was enhanced by constructing refugees as fully functioning and equal “members” of society (Phillips and Hardy, 1997).

We also wanted to study the effects of broader, societal discourses on these strategies – to “unpack” some of the context that we had perhaps reified or, at least, presented in a very matter of fact, taken for granted way in earlier papers. For this project, we chose to focus on the Canadian refugee system and to use naturally occurring text – cartoons on refugees and immigration – as an indicator of immigration discourse to explore how broader societal discourses constrained and facilitated the discursive activities of the individual actors. This analysis revealed that immigration discourse could be used by the government to justify its role in the determination system, since the cartoons portrayed the refugees primarily as frauds. In addition, the public was often portrayed in need of protection. In other words, within the broader immigration discourse were constructions of not only refugees, but also an immigration system and a public, which supported and reinforce government control over immigration. Second, NGOs also had recourse to discursive resources to challenge the government through the portrayal of the government as cruel, corrupt and incompetent; and an immigration system that was inconsistent and often too tough. If the immigration system and the government could not be relied upon to protect refugees, then the need for NGOs was clear. Third, there was *nothing* that represented refugee as autonomous, empowered, independent human beings, meaning that refugee organizations had difficulty in using broader immigration discourses to support their interests (Hardy & Phillips, 1999).

To conclude, we have tried to include both text and context in our studies. We found that our earlier research helped to provide an understanding of the discursive contexts of our studies, without which we could not have made sense of the role of particular texts. For

example, in the cartoon study, it would have been impossible to analyze the cartoons or to present a paper that was comprehensible to readers without the extensive “background” data collection and analysis. This understanding comes at the risk of reification – as complicated discursive backdrops are compressed into journal articles but it does not, in our opinion, outweigh the advantages of presenting an interpretation of contexts. In this regard, we subscribe to what Alvesson & Kärreman (2000a) call *discursive pragmatism*: where researchers, while needing to be modest in claiming empirical grounding for “reality” are interested in discursively produced outcomes in ways that allow wider interpretations.

Structure and Agency: Our Experiences

While sensitive to the debate between structure and agency, our interest has been in those approaches within discourse theory that admit some form of agency. Our original interest in critical studies of collaboration and our use of critical discourse theory has led to a view of the constructive effects of discourse as political (Potter & Wetherell, 1987; Fairclough, 1995). We see organizations as “sites of struggle where different groups compete to shape the social reality of organizations in ways that serve their own interests” (Mumby & Clair, 1997: 182). Discursive activity is thus a form of political activity where actors try to change understandings of a social situation, shape particular experiences and invoke certain practices within a system of meanings commensurate with their interests (Deetz & Mumby, 1990; Mumby & Stohl, 1991).

[T]he inherently relational notion of field, *qua* space of struggles, reintroduces the dynamic of the agent into textual analysis. Discourse analysts should never lose sight of this dynamic. Indeed, texts are weapons that agents in struggle use in their discursive strategies. (Chalaby, 1996: 694).

At the same time, we are aware of the interplay between structure *and* agency and would encourage researchers to address this complex issue. In many respects, this is the most difficult aspect of our research for a variety of reasons. First, the theoretical debate between structure and agency is itself deeply embedded in the field of organization and management

theory. It is longstanding and affects every aspect of our work. It is not a matter that is easily resolved if, indeed, it is resolvable at all. Second, the structure agency debate involves complex theorizing about complex relationships, which become even more complex when trying to design empirical studies to address these issues. In spite of, or perhaps, because of the complexity of this debate, we believe that it is imperative that researchers continue to address issues of agency and structure in their empirical work. In fact, we predict that this will be one of the most important theoretical debates in the field of organizational discourse theory, to which empirical work that is sensitive to these tensions can contribute.

Reflexivity and Pragmatism: Our experiences

We are well aware of the importance of reflexivity in studying organizational discourse in particular, as well as in organization and management theory more generally and try to take opportunities to reflect back on our work by writing specific reflective pieces and revisiting our methodologies (e.g., Hardy et al., 2001; Phillips & Hardy, forthcoming). We also have a particular perspective on reflexivity and have sought to broaden the focus on the researcher, which is emphasized in much of this literature on reflexivity, to include the broader research community. Aware that our research is discursively constructed through our own participation in it *and* by the larger academic community, we have resisted calls for confessional monologues where researchers present their experience and declare their personality for interpretation by the reader (Jeffcutt, 1994; Linstead, 1992).

The reason we do so is that this approach to reflexivity tends to draw attention away from the research subject towards the researcher (Hardy & Clegg, 1997; Hardy et al., 2001).

We agree with those who wish to focus on signification, language as productive when it has no “referents” outside, but it is also important to hold onto some notion of representation... [otherwise] the emphasis can shift the focus to the account rather than what is being accounted for. Second, wallowing in the researcher’s interpretive assumptions and processes can detract from the importance of the topic and possible political interventions. Third, agonizing about subjectivity and power can lead worried researchers to abandon the project of making interpretations that go beyond reflexive

concerns because of anxieties about exploitation or the paternalist relations set up in research (Burman & Parker, 1993: 168).

This danger of neglecting the research community means that the researcher is seen as a form of hero (Jeffcutt, 1994) — a free agent, largely disconnected from the professional networks of individuals and institutions in which they are embedded. Yet, as Jeffcutt (1994) also acknowledges, the research “quest” is shaped by the need to submit doctoral theses, publish articles, appear at conferences, etc. (Hardy & Clegg, 1997).

So, while we do, at times, attempt to be reflexive, we might also be described as pragmatists. As Weick (1999: 803) has pointed out, we can find ourselves “stuck in reflexive acts and be unable ... to see anything other than doubt as the core of the human condition.” To some theorists, this is undoubtedly a step in the right direction – loosening “the tight coupling between power/knowledge” but not necessarily for those who are interested in helping “people make sense of an unknowable, unpredictable world” Weick (1999: 803). In carrying out empirical studies of organizational discourse, our aim has been to write interesting papers that examine individuals’ experiences, link them to theoretical ideas and try to make sense of them. In so doing, we inevitably risk falling into the trap of which Alvesson & Kärreman (2000a) warn us: that, even when researchers philosophically question the assumption that language is simply the medium for conveying meaning that represents reality, they still write up their research as if it does. We would argue that, to some extent, this is unavoidable. We would also warn against privileging and idealizing reflexivity – as with anything in this postmodern world, it constructs a particular reality in which some voices are made louder and others are silenced.

CONCLUSIONS: CONTRIBUTIONS OF DISCOURSE ANALYSIS

This final section presents the contributions that discourse analysis has made to our research, as well as to organization and management theory more generally. The first way in

which discourse analysis has contributed to our own work relates to identity – not a traditional conceptualization of identity with an individual possessing a series of essential characteristics that defined his or her identity – but a postmodern view of identity as a series of overlapping, contradictory and fragmented categories that are used to make sense of an individual and as a result of which certain practices are invoked. For example, in our study of on refugees, the “official” story suggested that individuals were determined to be refugees as a result of quasi-legal, rational decision-making process, which revealed whether or not they were legitimate asylum-seekers. Our research showed a rather different story – that the identity of a “refugee” was far more tenuous, and existed only insofar as individuals were inserted into organizationally contrived categorizations as a result of rather arbitrary decision-making processes. In our work on whale watching, we found that the identity of a whale changed significantly over time – from “Moby Dick” to “Free Willy” – and the latter, rather than the former, was far more conducive to the creation of a whale watching industry. Our study of the Canadian HIV/AIDS treatment domain suggested that the different identities conferred different abilities to influence the domain – those who were volunteers in PWA (People with AIDS) organizations and who were HIV+ wielded more influence than those who were healthy paid employees of AIDS service organizations. Discourse analysis proved to be powerful methodology in exploring the construction and implications of these fragmented, fluid and ambiguous identities.

The second contribution relates to the constructive effects of discourse – not just in terms of individual identities, but also organizations, collaborations, interorganizational domains and institutional fields. The influence of postmodernist thought on the field of organization and management theory has long emphasized the dangers of reifying phenomena like “organizations” and argued that we need to treat them as fluid, unfinished, fragile relationships that are made meaningful and “real” only through discourse. Accordingly,

we found discourse analysis a useful way to explore the way in which the “organizations”, “collaborations”, interorganizational “domains” and institutional “fields” that we have been studying are, in fact, created and recreated through discursive activities.

The third contribution stems from the critical perspective that lay behind the original research program. We had initially commenced the study of collaboration in order to subject it to critical interrogation and to explore its political effects. Over time, we began to take a more explicit interest in the strategic and political effects of discourse – how individual actors used discourse in order to bring about particular outcomes. We began to develop a discursive approach to power, which complemented the critical framework that we had used in earlier theorizations. Accordingly, we have found discourse analysis useful to explore the ways in which actors engaged in discursive activities, the outcomes that resulted from this activity, and in the ways in which other actors attempted to resist these activities.

To conclude, we have found discourse analysis immensely useful in conducting our own empirical work. In a broader sense, empirical research on organizational discourse is also important for the future of organization and management theory (see Phillips & Hardy, forthcoming). Specifically, organizational discourse theory offers a way to explicitly incorporate the “linguistic turn” into the study of organizations through its problematization of language. Second, as has happened with our own research, it offers ways to reinvigorate critical studies of organizations through the melding of critical and post-structural insights. Third, it provides a way to study such topics as the natural environment, globalization, identity and post-bureaucratic organizational forms, which are seen as fluid, contradictory and ambiguous in their meaning. Finally, it complements existing theories to increase theoretical plurality and diversity in the study of organizations. As a less formalized, less institutionalized methodology, it affords researchers considerable creativity in how they apply it and the organizational phenomena they are able to see through it.

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