Applying Discourse Theory: When ‘Text’ Is More than Just Talk

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Abstract

This case provides an overview of the application of Discourse Theory. It outlines the underpinnings of Discourse Theory, including the constitutive role of ‘the political’, examines how data, or ‘text’, are defined in Discourse Theory and explores how it may be usefully applied in the context of an empirical research project involving multiple data sources. Employing an example from an interdisciplinary research project, I demonstrate the applicability of Discourse Theory in examining the hegemonic articulation of the subject position, the contagious immigrant, in Sydney, Australia, as it relates to tuberculosis (TB) and HIV. The project draws on an analysis of a range of ‘texts’, including legislation, legal judgements, policy documents, as well as print media articles. The collection, analysis and presentation of ‘text’ within a Discourse Theory approach are critically discussed, particularly in relation to traditional approaches to social research.

Learning Outcomes

By the end of this case, you should be able to

- Understand the ontological underpinnings of Discourse Theory
- Reflect on, and appreciate, the difference between Discourse Theory and other approaches to discourse analysis
- Define ‘text’ within Discourse Theory
- Identify ways to apply Discourse Theory within the context of empirical research projects

Discourse Theory: Origins and Underpinnings

The emergence of post-structuralist Discourse Theory was prompted by the publication, in 1985, of Ernesto Laclau and Chantal Mouffe’s joint work Hegemony and Socialist Strategy (hereafter referred to as HSS). HSS heralded a break from previously dominant Marxist approaches to political analysis and signalled the adoption of an approach which drew simultaneously on post-structuralist, post-Marxist and psychoanalytic lines of thought, building on the work of theorists such as Jacques Lacan, Michel Foucault and Jacques Derrida, as well as the influence of new social movements and demands for social justice that emerged during the 1970s, tied to the rise of so-called ‘identity politics’.

Discourse Theory provides a novel approach to exploring issues that arise, and indeed that are constructed, through political discourses. It is a problem-driven approach to research, insofar as it explores the logics and articulations underpinning the materialisation of particular political problems. These problems, as political theorists Jason Glynos and David Howarth note, are always necessarily constructed out of disparate ‘empirical phenomena’, through a process termed articulation, which involves articulating various elements in a way that changes the meaning of their constitutive elements, rather than existing independently in the
world, absent any process of construction and in a seemingly a priori manner.

In a direct challenge to the Marxist notion that identity is determined and structured in accordance with one's position within the social (understood as ‘economic’) hierarchy, HSS instead stressed the ontological primacy of the political in the emergence of subject positions, or identities, and social practices themselves (including the way in which the ‘economy’ is organised). Accordingly, in the approach elaborated within HSS, subject positions, such as ‘worker’ or ‘Black’, are no longer understood as pre-given with reference to some underlying essence, such as one's position in the economic hierarchy or ‘God's will’. Instead, they are understood as actively constructed in, and through, competing political discourses; the antagonisms they give rise to over time, which threaten their ‘hold’ or unity; and the political decisions taken within specific moments within these discourses. Discourse, then, contains the sediment, or trace, of prior acts of power marked by inclusion and exclusion, amidst a field criss-crossed by antagonisms. As Laclau and Mouffe argue, they represent attempts to fix meaning, through the ‘quilting’, or positioning, of different signifiers (for instance, the terms ‘women’, ‘gay’, ‘lesbian’), around specific master signifiers (such as ‘social justice’, ‘feminism’ or, as is common in contemporary ‘right-wing’ discourses, ‘common-sense’). Discourses thereby create the conditions for the articulation of new, and alternative, political projects, which can become hegemonic, becoming naturalised and part of our often taken-for-granted assumptions.

The process of articulation, through which subject positions, or identities, are either delimited or called into question, works by changing the meaning of specific signifiers once they are articulated within specific discursive chains of equivalence and difference. The signifier ‘trade union’, for instance, assumes a different meaning within neo-liberal discourses, when compared to socialist discourses. However, it is the contiguity between these discourses, and the possibility of their subversion (e.g. that the terms are used in different ways and antagonistically in both discourses), that lends credence to the notion of articulation as a viable explanatory strategy and grounded process through which to explore how governments lose power, people or subjects lose legitimacy, new demands arise and life itself is literally transformed, through political discourse.

Discourse Theory, as Oliver Marchart has observed, is thus ‘politics as first philosophy’. It constitutes an ontology, or theory of being, rather than a methodology, insofar as it provides a specific way of thinking about objectivity, which situates it within the terrain of the discursive. In doing so, it moves beyond taking people's identities as a given, or fixed, and instead provides a basis to challenge their naturalisation and reveal their contingency, or the circumstances that made the construction of such identities possible and seemingly part of an everyday ‘common-sense’. In contrast, other approaches to social research sometimes engender a tendency to take subject positions, such as ‘woman’, ‘man’ or ‘immigrant’, in particular contexts, for granted, by assuming that they are universally stable subject positions, rather than implicated in political discourse, including nationalistic projects, for example.

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Defining ‘Text’ in Discourse Theory: Moving beyond the ‘Non-Discursive’

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Unlike other approaches to discourse analysis popularised by Michel Foucault, Discourse Theory eschews any arbitrary distinction between the so-called *discursive* and *non-discursive*, or the supposedly material and non-material. Historically, this distinction, as expressed in Foucault's *Archaeology of Knowledge*, has worked to separate practice(s) from spoken or written word, including in data collection and analysis. Laclau and Mouffe argue instead that ‘every object is constituted as an object of discourse’, meaning that besides an object's material existence, which Discourse Theory does not dismiss, in order to assume meaning in the first place, every object has to be articulated in a certain way, within a particular discourse. Following Derrida's often-cited assertion, Discourse Theory thus proposes that there is ‘nothing outside of the “text”’.

This definition treats ‘empirical raw materials’, including Parliamentary Hansard, media articles, interview transcripts and government documents, as what Howarth and Stavrakakis term ‘discursive forms’. This enables the Discourse Analyst to approach these materials, and the discourse(s) they are implicated in, as part of a broader ‘archive’ for analysis, as Howarth notes.

‘Texts’, from this vantage point, are seen as constructed through myriad forms and in relation to one another, rather than functioning in and through an ontological divide between social practices and ‘discursive’, sometimes read as purely linguistic constructions. Rather, these all form part of a discursive totality, within which our experience, and framework of intelligibility, or ways of understanding the world and our relation to it, is enveloped. Apartheid, for instance, could be seen as a particular Discourse that positioned specific subject positions, such as ‘Black’, or ‘Coloured’, as subordinate to ‘White’, albeit along a continuum that invoked likeness (a logic of equivalence) as well as difference (a logic of difference), engendered through specific political practices that were instituted as the ‘norm’, such as separate amenities and a segregated education system. This approach to defining the ‘text’ enables the Discourse Analyst to interrogate what is being said within and across discourses as well as what is being left unsaid, revealing logics of equivalence and difference within a discourse and the antagonisms that exist therein.

This does not mean that researchers do not make a distinction between different forms of data, or ‘text’ in the Derridean sense. As Howarth has noted, in the course of empirical research projects, one can, and indeed has to, make practical distinctions between data sources. For instance, Parliamentary Hansard is different to a print media article, or an in-depth interview transcript. While these practical distinctions are made in the course of a research project, they are not maintained in terms of how we examine or explain the object of focus within a Discourse Theory–informed research project.

This alternative conceptualisation of ‘text’, with its attendant implications for researchers, enables us to adopt a more responsive approach to analysing social practice(s). It enables us to recognise that social practice(s) are both the product of and are capable of challenging political discourses. This conceptualisation of text also encourages us to engage with the fact that it encompasses a range of elements, including what people say, what they do and the explanatory schema we draw on to make sense of their practice(s).

**Challenges and Tips**
The Importance of Immersion

Conducting research informed by Discourse Theory, which, as I have noted, is an ontological framework, differs from other approaches to social research, which can be driven by methodological concerns. These other approaches tend to afford importance to how one collects data, and analyses the data, sometimes without accounting for the purchase of such explanations in a broader political context – the context in which we live and engage. Undoubtedly, this reflects their ontological concern for given, yet seemingly highly contestable, subject positions, such as the term ‘Black’, or a related methodological concern for a particularly constituted standard of ‘rigour’, which is invariably rooted in particular disciplinary training. Instead, Discourse Theory requires a deeper form of immersion in order to engage with subject matter: a form of engagement that goes beyond a mere tallying of results, or presentation of themes. Given that Discourse Theory projects are often problem-driven, examining the way in which the ‘problem’ (whether it be an ‘ethnic conflict’ or ‘neo-liberal regime’) has been articulated is the critical task, and this takes us beyond a mere description of different identities, or subject positions. This represents a challenge to some approaches to social research, for example, where peoples’ subject positions, such as ‘Black’ or ‘Asian’, are taken at face value and viewed as a ‘natural’ starting point for research itself. Grasping the nature of identities, or subject positions, as articulated constructs is thus critical and requires deep immersion.

A particular strategy to aid immersion, which is common across qualitative inquiry, and which I have found to be helpful, is the close reading of texts, which can precede forms of thematic analysis, for example. Close reading enables a researcher to familiarise themselves with an often weighty body of literature and, in the process, challenge assumptions that may arise from intuition, prior exposure to a theoretical framework and disciplinary assumptions or a tendency to identify categories and themes, without exploring relationships between concepts. For instance, in my research project on immigrant tuberculosis (TB), my simultaneous engagement with Parliamentary Hansard, legislation, policy documents, guidelines and Migration Review Tribunal Decisions, through sustained close reading, enabled me to do two things. The first was to examine how the object of TB has been constructed in Australian political discourses, and the second to explore how this has played out in the development of migrant health screening policy, with specific impacts on particularly constructed migrant, or more correctly, legally designated ‘non-citizen’, bodies. An absence of such an exercise in sustained close reading may have resulted in a mere description of immigration legislation and policy, may have failed to parse out the distinction maintained in popular discourse between the construct of ‘immigrants’ and the legal designation of ‘non-citizens’ in Australian law and, perhaps most importantly, may have neglected the impact of these constructions in discourse on social practice, which is part and parcel of how discourses around contagion, for instance, are maintained.

Rigour and the Realities of Judgement in Data Analysis

Developing skills in judgement is central to Discourse Theory. Given the centrality of immersion to Discourse Theory and the resulting mass of materials, or texts, with which one has to work, judging which signifiers
are significant, and which discourse is hegemonic, within the overarching ontology engendered by Discourse Theory is critical. While judgement is a skill required across the social sciences, as Glynos and Howarth note, cultivating the skills required to exercise judgement in Discourse Theory is a distinct task. This is because, in Discourse Theory, importance is afforded to the broader explanatory framework and not merely how one collected the data and how particular data fit within a search strategy, which more narrow ‘methodological’ approaches tend to emphasise.

By referring to judgement, I am not talking about a specific standard that applies across all contexts and research projects. Instead, I am referring to cultivating an awareness of context, that pays attention not only to data in front of you, in the form of print media articles, Hansard or transcripts of public speeches but also contextually important things – including developments in political discourse – things that are often overlooked when your head is buried in books.

Glynos and Howarth, drawing on the work of other scholars, have introduced the useful notion of ‘situated ability’ to refer to the nature of the judgement made in the context of research projects. This refers to the ability of the researcher to ‘acquire and enact the capacity to connect a concept to an object, or “apply” a logic to a series of social processes, within a contingent and contestable theoretical framework’ (p. 184). It relates to the judgements we make in the context of research projects, making decisions about what counts, under which circumstances and when. In the context of my research project, which involved case studies, as well as other forms of ‘text’, judging the importance of these specific cases, and their relation to social practices, embedded in broader political discourse proved critical. It required close attention to what was said, and left unsaid, as well as how social practices, such as appealing decisions to the Australian Migration Review Tribunal, sometimes at least transiently, challenged the hold of existing regulations and the political discourse undergirding them. This, in turn, reveals the contingency of political discourse.

‘Contagious Immigrant Bodies in Australia’: Bridging the Methodology/Method Divide

In Horner and Rule, we applied a Discourse Theory approach to the issue of migration exclusion on the basis of HIV and TB in Australia. The paper operated from the problem-driven premise that the incidence of TB among immigrants had been articulated as a threat to the health of the ‘Australian community’. Grounding our analysis and providing evidence of how the incidence of TB among immigrants has been articulated in this way, we used recent political controversies, that featured heavily in the print media and reverberated in political discourse in 2006, and a review of migrant health screening in Australia as our point of departure.

The analysis involved a step-wise process. First, we identified relevant data sources. This entailed using our intuition to locate various publicly available sources of information relevant to our research. Print media articles, Parliamentary Hansard, policy documents (primarily relating to the Department of Immigration and Citizenship, who oversee health screening for migrants) and decisions of the Migration Review Tribunal were
all reviewed. Some of the search strategies used were more systematic, such as a search for print media articles using an online database, while others were more guided and purposive, including the search of Migration Review Tribunal decisions.

Second, once these data had been amassed, we conducted a close reading of texts, in order to inform the way in which we frame the response to migrant TB and HIV within Australian political discourse. This resulted in the identification of numerous ways in which differences, and seemingly salient frontier lines, between immigrants and ‘Australians’ (through the use of the term the ‘Australian community’) are inscribed in policy and legislation and, by implication, discourses of migrant contagion in Australia. This phase of analysis exemplifies the notion of situated ability and the critical role of judgement in Discourse Theory: judgement about what counts, when and under which circumstances.

Third, having established this discursive terrain, we carefully analysed specific cases contained in our data set, or texts, such as decisions made by the Migration Review Tribunal, that appeared to call into question conclusions we arrived at during the second phase of analysis. For instance, while the law and regulation is posited as an absolute bulwark to prevent ‘disease importation’ in the discourse of migrant contagion, we located cases where the law was brought to bear retrospectively, and sometimes in spectacular ways, to police the movement of non-citizens with TB already ‘inside’ Australia, or, in the case of HIV, people applying for certain permanent residence visas. This enabled us not only to ground the cases we provided in the article by Horner and Rule but also to ensure that the explanations we provided were justified, not just as exceptions, with reference to the broader data we were working with.

Our analysis revealed that TB has always been inscribed as a ‘threat’ to the ‘Australian community’, a distinctly spatial, but no less political, imaginary, in Australia’s migration legislation. Through a close reading of legislation and regulations, in relation to print media texts and policy documents, we were able to effect a form of data-source triangulation, revealing how decisive public spectacles concerning the potential for ‘disease importation’, as it is framed in political discourse, had been.

This inscription of migrants as contagious, and by virtue of this, a ‘threat’ to the ‘Australian community’ was reinforced through political discourse, stressing the dangers posed by what we termed ‘infectious outsiders’, borrowing from Anna Marie Smith's phrase of the ‘outsider figure’. Such outsider figures are emblematic of the drawing of what Laclau and Mouffe term ‘frontier lines’ within political discourse. This political discourse of contagion through immigration, and the frontier lines it establishes, draws on familiar tropes, some of which were prominent in the early years of HIV/AIDS, concerning the threat posed to the seemingly ‘mainstream’, by not only literal but metaphorical, spill-over from supposedly deviant subpopulation groups. While this discourse does not necessarily pay attention to the aetiology of disease, and in the case of HIV/AIDS, a virus, it does identify a seemingly eternal threat, about which perpetual vigilance, on the part of the ‘ordinary citizenry’, is seemingly warranted.

Our analysis demonstrates that specific subject positions are highly political, and not merely historic, constructs that could always be articulated in other ways. They are contingent and reflect the dominance
of a political discourse that positions migrants as contagious, rather than innate facts or certainties, as demonstrated by this case.

Conclusion

Discourse Theory, underpinned by the anti-essentialist political thesis developed by Ernesto Laclau and Chantal Mouffe, both in HSS and later writings, provides a number of critical concepts, and indeed a theoretical grammar, that enables to grasp the changing character of political discourse, and with it the subject positions or identities with which people can identify. It also enables us to engage with the constitutive practice(s) that either solidify, or threaten to undermine, the hold of such discourses. Analytically, this implies that subject positions, far from having an innate, and seemingly fixed, essence, are constructed contingently as a result of political struggles to establish a particular meaning, in a field criss-crossed, as Laclau and Mouffe remind us, by antagonisms. These insights, which extend beyond the locus of the methodological to the plane of the ontological, force us to critically reexamine often long-held ideas about the nature of reality, and the specific discourse that is constitutive of that ‘reality’.

In the case of migrant health screening for TB and HIV, as I have argued, assumptions about who represents a ‘risk’, and therefore a ‘threat’, to the health of the ‘Australian community’, both of which are legally and politically grounded assumptions, rest on notions of an ‘infectious outsider’, as articulated within a discourse of migrant contagion, in which TB and HIV are figured as a ‘threat’. These are inscribed historically in Australian migration law and maintained in contemporary political discourse. This effectively establishes a frontier line between the bodies of ‘infectious immigrants’ and healthy ‘citizens’ in the Australian context: a distinction maintained by, and through, political discourse, encompassing the print media, Parliamentary Hansard and regulations. However, revealing the contingency, rather than inevitability, of decisions taken during specific political moments, in relation to migrant health screening, enables us to challenge seemingly taken-for-granted practices that are implicated in maintaining spatial distancing between migrant and non-migrant bodies.

Examining contemporary issues that elicit fear or disavowal, including the spectre of TB and HIV among migrants, necessitates an approach to research that engages with ‘the political’, or that realm of antagonism that undergirds everyday life. Here, Discourse Theory is uniquely positioned, constituting an approach that is essentially ‘politics as first philosophy’. As a result, it has broader relevance and applicability in the context of research projects that are problem-driven and that seek to engage with highly politicised issues or topics, particularly those in which specific subject positions or identities are implicated.

Exercises and Discussion Questions

How does Discourse Theory differ from other forms of discourse analysis, in terms of how it conceptualises discourse?
How is ‘text’ defined within Discourse Theory, and how might this impact on the kind of data collected, and how it is analysed?
What role does judgement play in the application of Discourse Theory?
Identify three of four qualitative methods that may be appropriate to use within a study informed by Discourse Theory.

Further Reading


References