Outsourcing the war
when jobs flee

—

A mixed-methods approach to the story of

outsourcing

Pro gradu thesis
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April 30, 2008
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List of abbreviations

CDA = Critical Discourse Analysis
CL = Cognitive Linguistics
ECG = Embodied construction grammar
fMRI = functional magnetic resonance imaging
LM = Landmark
NY Times = The New York Times
OED Online = The Oxford English Dictionary Online
SPG schema = Source-Path-Goal schema
TR = Trajectory
UML = Universal Markup Language
1 Introduction

The interplay of cognition and culture is a relatively newly recognized point of interest in the field of Critical Discourse Analysis (CDA). Because of this newness, many aspects remain uncharted, and the cognitive aspects in discourse analysis have often been downplayed or ignored altogether (Dirven, Hawkins & Sandikcioglu 2001, Dirven, Hawkins, Frank, Sandikcioglu & Ilie 2001, O’Halloran 2003, Wodak 2006, Wodak & Chilton 2005). The problem is both pragmatic and theoretical – how to bridge cognition to text in theory and in the practice of analyzing language?

This study has two aims. First, it suggests a multimethodological approach in which Critical Discourse Analysis benefits from the breakthroughs in cognitive linguistics, utilizing a methodological helper, a mixed methods approach created in the field of psychology. Second, it attempts to test this framework in practice by describing and interpreting the changing story of a business lexeme that has become a global phenomenon in constant change – outsourcing.

The benefits of the first aim are self-evident, and the mixed-methods approach adds a one: CDA has been criticized for emphasizing one-viewpoint, researcher-dependent approach only (see for example O’Halloran 2003). The descriptive, second aim of this study has importance that transcends the field of linguistics and the purpose of testing the first – outsourcing binds to business and politics in a way that benefits from a cognitive and linguistic description, an endeavor that has not been attempted before. In the analysis, we see the changing meaning of outsourcing. In it, there are aspects of more general developments in business language, which is fast in renewing itself. This renewal is a well-known and cited phenomenon (cf. Aula & Hakala 2000, Luostarinen 1994). The observations, however, have been suffering from lack of depth. The examples given do not often go into details in describing the
1.1 A FIRST LOOK AT OUTSOURCING

linguistic or cognitive processes, such as pejoration,\(^1\) that take place when language renews.

As the title of this work shows, the main methods used to tackle these problems are many: discourse analysis and some aspects of cognitive linguistics combine with a questionnaire study and corpus methods. The main material, besides questionnaire results, remains the same: articles gathered from *The New York Times*, spanning from January 1981 to the end of December 2007.

Throughout the cognitive and discourse-analytical process, the focus will be on a single item, *outsourcing (n)*, but the stem form *outsource (v)* and derivant forms such as *outsourcer (n)* and *outsourced (a, v)* are also discussed and included in the data when relevant. To fully encompass the cognitive side of *outsourcing*, I will also explore its metaphorical aspects. The history of *outsourcing* presented next and further on in Section 4.1.2 is a synthesis of data gathered from *Oxford English Dictionary Online (OED Online)* entries for *outsourcing* as well as its stem and derivant forms and data gathered from *The New York Times (NY Times)* online archive.

### 1.1 A first look at outsourcing

Now, for a closer look at *outsourcing*. My own interest in the particular lexeme first sprang out of the seeming discrepancy of its dictionary definitions shown below in Table 1.1 and my observations regarding the context and scope of its actual usage. The context of business covertly given in the dictionary entry was, in some cases, abandoned in a way which indicated rapidly changing meaning. I was interested in the mechanisms underlying the apparent change and eager to see if my subjective observations would be confirmed in a larger set of data.

To illustrate the development, the textual observations from the *NY Times* seem to stage the change in usage from the early

Mack Reiterates ‘Outsourcing’ Plan (*NY Times*, Business, January 25, 1986),

to the personified

---

\(^1\)Pejoration is, according to (Finch 2000, 173): “A semantic process, sometimes referred to as deterioration, in which a word takes on a negative evaluation, for example *gossip*, which originally meant ‘god-relative’ and now means ‘idle talk’.”
1.1. A FIRST LOOK AT OUTSOURCING

outsourc*

OUT- + SOURCE v.1 trans. To obtain (goods, a service, etc.) by contract from an outside source; to contract (work) out. Also intr. OUTSOURCE v. + -ING1. The action or practice of obtaining goods or services by contract from outside sources.

OUTSOURCE v. + -ED1. Obtained by contract from a outside source; externally contracted.

OUTSOURCE v. + -ER1. A person or organization which provides goods or services by contract from outside a particular organization or area; an external supplier.

Table 1.1: *The Oxford English Dictionary Online* entries for outsourc* (Oxford University Press 2007)

Outsourcing Comes to Summer Camp (*NY Times*, Travel, July 9, 2004),

and further, to the contextually different:

The Outsourced Brain (*NY Times*, Opinion, October 26, 2007).

Furthermore, my own observations indicate that the change has crossed language barriers into Finnish:

Ulkoistin tiskauksen Susannalle.

‘I outsourced doing the dishes to Susanna.’ (My translation.)

It seemed that outsourcing might be an example of giving voice and personality to a phenomenon, thus also connoting it with meanings dictionaries are not yet familiar with. I wondered whether this was the case and if so, what were the processes that took place before such a shift. What explains the gap between my own observations and the dictionary entry and how did it develop?

These examples are in stark contrast with the dictionary definition of outsourcing, shown above in Table 1.1. According to *OED Online*, outsourc first appears in 1979 in the *Journal of Royal Soc. Arts* 127 141/1. The etymology can be tracked by the latter constituent of the compound OUT + SOURCE, which
is most likely derived from earlier business language in the sense “to obtain from a specified source; spec. of components (for a vehicle)” or from the nominalized form sourcing, “the obtaining of goods and components from a specified or understood source.”

These dictionary definitions seem straightforward and relatively concise; judging by them, outsourcing does not seem particularly polysemous, the most likely development of meaning being from the verb form toward agents and participants surrounding the activity. But is this dictionary description broad enough and what is left out of it?

By looking into how and in which contexts, or frames, outsourcing has been used, we also see one possible path of abstractification and metaphorization of a business term: the way it becomes more polysemous when becoming a frequently used business strategy and how it widens its meaning in the process. Additional to this, when looking into the metaphorical development of outsourcing, we also see something of the ways in which companies are comprehended as entities in news texts and how those entities form.

1.2 Methods and theories

As mentioned earlier, besides combining CDA with the cognitive, the immediate, second goal of this study is to construct a multifaceted description of the semantic change in and usage of outsourcing that draws on knowledge produced by both the cognitive and the socio-cultural paradigms of linguistic studies. The methods work on different levels and help form a multi-faceted image of outsourcing. More important, the second goal tests the first: do the theoretical frameworks of sociologically oriented CDA and cognitive linguistics fit together in practical work?

How to study semantic change, then? The fundamental meta-framework underlying the actual analysis and methods of data gathering is a mixed-methods approach derived from the methodological tools used mainly in the field of psychology. It is a method for combining and working with both qualitative and quantitative data. In this particular study, I benefit from it when modeling a research approach that combines and compares the results of discourse analysis performed on news texts to quantitative analysis of the same material. To bring additional depth and to experiment with combining
methods, the results are further enriched by a questionnaire study, and a corpus data search performed on the same material as used in discourse analysis.

Before we begin, some notes on the structure of this work are necessary. Besides the introduction, this study divides into four chapters. Chapter 2 charts the relevant theoretical background to the study, aiming to give the reader insight into the theories which underlie the analysis carried out further into the study. During the chapter, I will be discussing both cognitive and sociological approaches to language and meaning. To make the reading process more straightforward, this chapter does not deal with the specific terminology or strategy of a given analytical approach: it is explained before each respective section of analysis, or given in a footnote when clarification is appropriate. Chapter 3 describes starting the research process from choosing research methods to finding and collecting material to study. It also covers the aspects of validity and reliability, as they connect closely with formulating the research structure. Chapter 4 contains the actual analysis of the material found, and Chapter 5 discusses the study and summarizes the results.

As the case often is when drawing on multi-disciplinary knowledge, the theoretical introduction to this work is quite heavy and demanding and not only that; many less central features, juicy arguments and aspects of the theories do not fit into this work, have to be explained only briefly, or be left out entirely. When the details of a particular subject have to be left unexplored or a given discussion is not central for this study, I will point out further studies in the subject field in the running text or in a footnote. To bring theory into practice, I illustrate the theoretical framework with practical examples where relevant for understanding the grounds for the analysis performed in Chapter 4 and the general scope of this study. This will hopefully help the reader grasp the essentials of the theories discussed and see them come alive in the analysis and in the discussion that follows in Chapter 5. Next, we take a look at the roots and concepts of the social scientific and linguistic framework of this study.
2 Theoretical framework

How does the sociological relate to the cognitive? An answer might be that both viewpoints are interested in human action and interaction, albeit from differing points of view. But can they survive without each other?

In the words of Saussure’s disciples: *la langue est une institution sociale* (de Saussure 1955, 33). As a social construction and as the realizer of social actions and relationships, language is central to all things communicative. Thus it may be deduced that knowledge of linguistic means and methods is especially useful in studying human interaction and social, communicative systems utilizing language as a means for transmitting information. But it must not be forgotten that language is a matter of the mind as well. And although the divide between signifier and signified still remains the foundation to theories discussing communication at any length, much has happened in linguistics since de Saussure. That is why, besides the social aspect of language, I choose to include the cognitive as well.

Research in communications has always been cross-disciplined and prone to influences from various scientific fields ranging from biology to philosophy (Mattelart & Mattelart 1998, 1-3). Studies in semiotics and communication, for example, share common ground in de Saussure’s (1955) *signifié* and *signifiant*, the dual nature of the sign, the separation of the means of reference and referent and the agreement on the arbitrariness of signs (1955, 158-162). These are the grounds for both the cultural and the linguistic conceptions of meaning discussed in this chapter.

In the following, I outline the theoretical framework of this study. These different theories complement each other and offer theoretical or pragmatic knowledge on different levels of communication and/or linguistic data mining. The theoretical basis for this work is wide and may be a demanding read. It includes aspects of cognitive linguistics and combines these with the intertextual discourse-analytical approach used in Critical Discourse Analysis. Because the array of topics to discuss is wide, I will keep to the
essentials for this particular study, pointing out only things relevant for the analysis of outsourcing or to the problems and solutions in combining these two approaches. Things interesting and important but of less relevance to this study will be mentioned in footnotes in case the curious reader wants to dig deeper.

First, I will discuss meaning and mind, namely conceptual schemas, framing, blending and the cognitive-semantic approach to metaphor and metaphorical language. Second, I will discuss meaning and culture, opening up some of the main sociological concepts underlying the discourse-analytical approach used later on in the analysis of the text samples of outsourcing, and, more importantly, referred to in the discussion following the analysis. I will focus on defining discourse, representation, text, intertextuality and the functional approach to language from a sociological point of view. Because the main source of analyzable material in this study is a newspaper, I will also briefly brush the topic of communication as a system with special regard to mediating meaning in mass media. Third, I will turn to examining the interaction of the cultural and the cognitive, combining both the sociological and the cognitive aspects presented earlier and attempting to relate them to each other. The different levels will be discussed in Section 2.3, before we move on into research formulation and analysis.

Now, let’s take a look at meaning and the human mind.

### 2.1 Meaning and mind

How do we make meaning? Are we born with it or is it born in contact with others? This age-old question of nature versus nurture is, in this chapter, elegantly skipped. Instead of asking that question, I choose to ask another. What if it is both nature and nurture? For the purposes of this study I claim that the social cannot be fully explained without the cognitive. That is, the cognitive affects the social and the social affects the cognitive.

I do not mean to go into extremities – taken to its relative end, as in the anthropological Sapir-Whorf hypothesis, the impact of language on thought would mean that the language we speak affects the way we think to the point that persons speaking different languages do not even share the same reality (Raatikainen 2004, 49-50). This would mean that no universals exist. While
I do not agree with the extremely relativist view on language of the Sapir-Whorf hypothesis,\(^1\) the sometimes problematic relationship of the cognitive and the social is the main reason why I chose to explore cognitive sciences as means for understanding semantic change in general and aspects near outsourcing in particular. Instead, I choose to adopt the cognitive-semantic view put forward in Johnson & Lakoff (2002) that (1) universal embodied concepts exist but (2) many concepts still differ across languages and change over time.

I will now discuss the embodied mind. Starting from pre-language conceptual schemas and frames, I will move on to discussing metaphorical language and recognizing it in texts. Last, I will summarize some critical views. All along the way, I will illustrate the different and mixing levels of embodied experience with examples.\(^2\) Note that throughout this section and further on, I will be referring to metaphorical expressions using the convention popular in cognitive linguistics: SMALL CAPITAL LETTERS INDICATE A METAPHOR OR A METAPHORICAL EXPRESSION.

### 2.1.1 The embodied mind

An often interdisciplinary field of science, cognitive linguistics is interested in the interaction of language and cognition. The basic proposal is that language should never be considered separate from cognition and that our mind, ‘the wetware’, mediates all our experiences and understanding. The cognitive view approaches language using two principles (Feldman 2006, 3):

\[
\text{Thought is a structured neural activity.} \\
\text{Language is inextricable from thought and experience.}
\]

According to this view, the basis of abstract thought is our concrete experience, such as sensori-motor experience (see for example Feldman 2006, 7; Fauconnier 2001; Lakoff & Johnson 1980/2003; Lakoff & Johnson 1999).

A good text-level example of this is the metonymical etymology of the Finnish word *käsittää*, ‘to understand’, which derives from *käsi*, ‘hand’. The

\(^1\)See Lakoff (1987, 304-337) or Sweetser (1990, 6-8) for a deeper take on cognitive semantics in relation to Whorf and relativism.

etymology of the word suggests abstract experience such as understanding is related to making something known by touching it with your hands. An English equivalent close to the Finnish example is the use of *grasp* both figuratively and concretely (the English expression noted in Sweetser 1990, 20). This is what Lakoff and Johnson (1987; 1999, 60) call a primary metaphor, *understanding is grasping*, making an analogous comparison in relating primary metaphors to complex metaphors as atoms relate to molecules. These primary metaphors, such as *happy is up, more is up, knowing is seeing* and *organization is physical structure*, are always grounded in our experience (Lakoff & Johnson 1999, 63). We grasp objects as we grasp ideas. Ideas are given object properties, pertaining to the way we see and comprehend the world using our sensory system. And so, features of the sensori-motor system affect our perception of the world.\(^3\)

The philosophical consequences of embodied experience are far-reaching – accepting the viewpoint means altering or abandoning some of the old tenets of Western philosophy, such as Cartesian dualism, the separation of mind from body. These consequences have made good topics for a number of thick books, but, since my aim is to be at least partially pragmatic, I choose not to go deeper here (see Churchland 2002, 5-10 for a concise overview; Lakoff & Johnson 1999; Sweetser 1990, 1-13 for impact on the study of linguistics). Instead, let’s move on to the intricacies offered by the cognitive view on language.

### 2.1.2 Conceptual schemas and framing

The embodied view on language posits that we construct our experiences using pre-language *conceptual schemas*, which are space, time or movement-based and needed in construing meaning relations and actions (Feldman 2006, 132-136). These schemas are postulated to be mostly universal (Feldman 2006, 135), inherent in our neurological structure (Feldman 2006, 59-70) and pertaining to our common bodily experiences (Lakoff & Johnson 1999). In this they are unlike the culture-specific *frames*, which employ roles, actions

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\(^3\)This holds especially for the visual system, the basis of this assumption is well documented in Churchland (2002) and its meaning to the study of language summarized in Coulson (2006).
and relations particular to the specific culture or event familiar within that culture (Feldman 2006, 145-148).

Let’s take a look at conceptual schemas first. These define roles and participants for actions and spatial relations (Feldman 2006, 135) and underlie and help construct language. Motor schemas are used in performing physical activities, such as grasping, while image schemas, such as the container schema, are used to express spatial relationships (Feldman 2006, 135-137). Johnson & Lakoff (2002, 250) explain them as “neural structure[s] residing in the sensorimotor system that allow us to make sense of what we experience”.

The example sentence used in Figure 2.1, “The cheese is in the fridge”, shows an example of an image-schematic spatial relation. Image schemas are

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4For a more detailed description on frames, see the frame semantics of Fillmore (1989).
common to all languages, although they may be differently organized and varyingly used (Feldman 2006, 136-138; Lakoff & Johnson 1999, 380-381). They can be realized either by spatial relation words, such as in, out, on, above (Lakoff & Johnson 1999, 30-37; Feldman 2006, 138), or for example by morphological constructs such as the Finnish -ssaä, -llaä.

Each image schema contains a trajector (an object), and one or more landmarks which are reference objects to the trajector (Feldman 2006, 137-138). The relationship of the two is indicated by a spatial indicator. An example of a possible relationship between trajector and landmark is shown in Figure 2.1.

Talmy (1975) divides image schemas in three: topological, orientational and force-dynamic. Let’s take brief examples of these.

A topological schema can be for example a container or a path, as described in Figure 2.1. The main feature, boundedness or pathness, remains the same, irrespective of size or shape change and applies to abstract entities as well (Feldman 2006, 135). Similar to the sentence in Figure 2.1, we may also say:

1. The stars are in the sky.

2. The company was in trouble.

These two cases, illustrated in Figure 2.2, are slightly more complex than the cheese in the fridge.

In the first case, we see sky as an entity and stars as entities within it. Yet this is a classic case of viewpoint altering the perspective; in fact, we are in the sky along with the stars, impervious in visual experience – although not in fact – that we are so. It is the characteristics of our perception that make us think otherwise. In comparison, the etymology of Finnish words such as taivaankansi (‘sky’s lid’) and the astronomical taivaanpallo (‘sky’s sphere’) both suggest a topological approach. Note the variation here – we would not normally say that the stars are in the sky in Finnish, but that they are on the sky. The container schema of sky is not necessarily universal, but our tendency to make topological schemas is.

In the second case, we make a leap for the metaphorical – the company becomes an object contained within another object, trouble. This is an example of a container schema as well, although metaphorical. The schemas are illustrated in Figure 2.2 with notational properties used in Embodied Construction Grammar (ECG). I find this notation based on Universal Markup
The stars are in the sky

The company was in trouble

Company

trouble

schema Container
roles: interior
exterior
portal
boundary

schema Trajectory-Landmark
roles: trajector
landmark

Figure 2.2: Two topological image schemas. The containment and relational properties of ‘in’ are illustrated using a notation prevalent in Embodied Construction Grammar (ECG), which is a practical approach aiming to ease linguistic analysis (Feldman 2006, 298).
Language (UML) a convenient and exact way to model relationships and properties. Note that for simplicity, the image only contains the properties of the spatial indicator *in* modeled in this way.

Besides using this topological approach, our bodies make meaning relative to the functions and lay-out of our bodies’ orientations. These are called orientational schemas as they are relative to bodily orientations. They presuppose an entity that may, for example, possess the characteristics ‘front’ and a ‘back’, as seen in sentences such as:

1. The porch was in front of the house.
2. The cat sat in front of the mountain.
3. Will you back me up?

According to cognitive linguistics, the properties ‘front’ and ‘back’ are projected on the house because our vision field divides our experience to front and back.

A force-dynamic schema evokes some kind of force (Feldman 2006, 137), shown in examples:

1. I was against the motion.
2. They threw us out.

Here both *against* and *threw [...] out* evoke the force-dynamic schema. Note that spatial relation can also be expressed using compounds as in the latter example, where *out* also evokes a simultaneous topological container schema.

As for frames, Turner (2001, 12-15) describes conventional conceptual frames as “conventional schematic packets of shared knowledge,” which can be shared within and between cultures and include roles and interactions between elements. Thanks to this knowledge, for instance, we know that we are in the sky with the stars, not on some sky-external object looking back at them. Another classic example of a deeply entrenched frame is the 7-day week cycle.

A culture-specific frame is also possible. Consider, for example, independence day celebration. Depending on country and culture, this frame evokes widely different actions, relations and roles. Finnish people would associate it with lighting blue-white candles on their window-sill on a dark
December night, watching the presidential reception unfold on the television, pondering who has the most dreadful dress. US citizens would evoke the frame of their fourth of July, an entirely different experience in mind as well as time. In this sense, language really is relative, although not in the scope suggested by the Sapir-Whorf hypothesis.

These basics are needed to convey meaning and to separate entities from each other. Next, let’s take a look at metaphorical language as a vehicle of embodied experience.

### 2.1.3 Metaphorical language

Bréal (1899/1921, 124, 131-132) writes:

> [...] la métaphore change instantanément le sens des mots, crée des expressions nouvelles d’une façon subite. [...] Une espèce particulière de métaphore, extrêmement fréquente dans toutes les langues, vient de la communication entre les organes de nos sens, qui nous permet de transporter à l’ouïe des sensations éprouvées par la vue, ou au goût les idées que nous devons au toucher.\(^5\)

These almost synesthetic remarks by Bréal show the transformative functions of metaphor have been known for a long time. The most overarching definition by far, however, is the classic literary one. Metaphors have traditionally been described as colorful poetic devices and decorative, extremely visible and marked textual tools (Finch 2000, 170). The classification ultimately dates back to Aristotle’s literary views, and, closer by, to Cartesian dualism, the need to separate human mind from concrete matter; or to questions of the existence of absolute, objective truth and the possibility of deducing it (Lakoff & Johnson 1999, 98-102; Finch 2000, 170).

The traditional Aristotelian view on metaphor has commonly been interpreted as focusing mostly on the structural properties of metaphors and similes, characterizing them through the structural properties and mapping up metonymies with metaphors (Aristotle 350 B.C.E., Lakoff & Johnson 1980/2003, 123-127; but cf. Koller 2003, 14-17). This classification leaves out a

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\(^5\) [...] Metaphor changes word senses and rapidly creates new expressions. [...] A particular type of metaphor extremely frequent in all languages comes from the communication between our sensory organs: it allows us to hear the sensations experienced by eyes and taste the ideas we touch. (My translation.)
wealth of otherwise marked metaphors or expressions where the metaphor has become an inherent part of the lexeme used. Such is the case of the Finnish word *käsittää*, ‘to understand’, which derives from *to hold with hands*, as mentioned earlier in Section 2.1.2. The Aristotelian metaphor is something that is denotatively marked, actively understood and consciously interpreted. The problem with this view is that it does not take into account the actual productivity of metaphorical language in changing meaning, nor does it acknowledge its rich cognitive aspects.

Cognitive semantics follows philosopher Black (1962) in positing a radically different view on metaphor and, more importantly, all metaphorical expressions. Lakoff & Johnson (1980/2003) have challenged the objectivist philosophical approach, raising metaphors from textual filigrees to tools human beings use when conceptualizing the abstract and creating new meanings by relating them to old, working most often from everyday, basic-level experiences towards the abstract. According to them, metaphors are tools for building links between differing domains of experience: metaphor is a way to see one entity in terms of another. We *grasp* for ideas as we grasp for objects, *build* arguments as we build houses, *run* for presidents as we run for trains and *hunt* for sources for our academic papers as we hunt for animals.

Lakoff & Johnson (1980/2003, 66, 139) classify conventional metaphors as:

1. **structural metaphors**, the conventional metaphor in which one concept is understood in terms of another (Lakoff & Johnson 1980/2003, 4) as in:
   a) METAPHORS ARE HAMMERS
   b) JULIET IS THE SUN
   c) OUR COMPANY IS A SOARING EAGLE
   d) ARGUMENT IS WAR

2. **orientational metaphors**, in which the concepts are spatially related (Lakoff & Johnson 1980/2003, 15)
   a) METAPHORS ARE CENTRAL TO OUR UNDERSTANDING
   b) OUR COMPANY IS MOVING UP (UP IS GOOD)
   c) THE STOCK MARKET WENT DOWN ANOTHER 500 POINTS (DOWN IS BAD)
   d) THE BIRD FLEW OVER THE HOUSE

3. **ontological metaphors**, when an abstraction is represented as an object, substance, container or person (Lakoff & Johnson 1980/2003, 31)
This categorization is obviously an attempt to combine the old description of metaphors with some newer classifications. As we can easily see from the examples, the classifications are not exclusive, and metaphorical language usually utilizes several schematic aspects. The structural metaphor, for example, may possess orientational or ontological properties (in Example 1c, the metaphor is understood as a positive comparison because the soaring eagle benefits from the orientational, primary metaphor high is good). Several metaphors may, and indeed most often do, work simultaneously in a sentence in a structural, orientational and ontological way. Metonymies are a different phenomenon, where one entity stands for another, as in I drank the whole cup, the cup stands for its contents.

This is embodied experience. We work from our bodily understanding of the universe to the abstract, using metaphorical language to make sense of the new. It means that metaphorical expressions go much deeper than a simple comparison acted out in the conventional structural metaphor: metaphors are not mere figures of speech but building blocks for abstractivefication and taking in new knowledge. New concepts and experiences are understood in terms of objects, orientations and concepts of already familiar ones (Lakoff & Johnson 1980/2003, 115).

On text level, metaphorical reference happens when two or more conceptual domains meet. These are most often called the source and the target domain (Finch 2000, Lakoff & Johnson 1980/2003). The concepts and properties of the source domain, or at least a part of them, are transferred to the target domain. We make meaning by reaching out from that which is familiar to that which is new.

Let’s stop here and consider the complexities of metaphors and their possible functions; first, by looking at two simple examples and then taking a look back to two sentences from actual text:

1. Metaphors (target) are tools (source).
   Here the properties of tools are transferred to those of the abstract word
metaphor. After this transfer, metaphors possess similar qualities as tools – they become maneuverable, hand-used objects that can be used for building and mending other abstract linguistic objects.

2. The stock market (target) is on the rise (source).
   Here stock market becomes a path, perhaps on a trajectory that can scale up, or down. The path denotes a basic metaphorical construct good is up. We relate happiness, well-being and joyful things to up (Lakoff & Johnson 1980/2003, 15). Hence, getting there is often on a trajectory of upward motion.

Now, consider the two real-life examples; I first wrote the two examples shown below on page 15. They are also illustrated with Figure 2.3:

1. [...] raising metaphors from textual filigrees to tools human beings use [...]  
2. [...] working most often from everyday, basic-level experiences towards the abstract.

In Example 1, I make use of one explicit metaphor. I am raising metaphors from textual filigrees to tools. This expression then refers to a more basic conceptual orientation in its association. In raising metaphors as tools, I refer to the explicit, basic good is up. The argument contained within the sentence is meaningful for us because we think that raising something makes it better. The assumption higher is better is a cognitively predominant orientational metaphor (Lakoff & Johnson 1980/2003, 15). In the sentence, metaphors have already been likened to tangible objects, filigrees. When upgrading their status to tools, I am emphasizing their usefulness. As I do so, some aspects and properties of the tool domain are borrowed to that of the metaphor – metaphors become tangible, hand-held devices that help in constructing or tearing down text.

In Example 2, I use two English prepositions, from and towards, to describe a trajectory of my thought. Meaning becomes a trajector traveling from tangible experiences towards the abstract. Utilizing the image-schematic expressions explained a while ago, we can say that the sentence has two landmarks, LM1 is tangible experience and LM2 is the abstract, while metaphor is the trajector traveling between them. As we see, the metaphorical concept in Example 2
Figure 2.3: Examples 1 and 2 explained in images. Example 1 shows the embodied orientational metaphor **good is up**, from which the inference **higher is better** is made. In Example 2, the trajectory from... **towards** is only possible if the abstract entity is given path status.
is ontological: we like to give abstract entities object properties, make them containers or paths as described earlier in Section 2.1.2. These pre-linguistic object properties are prerequisites if metaphorical expressions are to possess dimensions and trajectories and if they are to interact.

As seen from the examples given above and the etymology of käsittää discussed earlier, some metaphorical structures are overt, clearly visible and noticeable; some covert, hardly distinguishable – so much used that they have become conventionalized and naturalized, most frequently used or read without further explicit thought. Which metaphorical expression is more forceful – the one we see and actively process, or the one that is covert?

The etymological conventionalization of metaphorical language is a source for debate – some scholars deem the active recognition of metaphorical expressions for what they are as a measure of the activity of the metaphor in language. We will briefly deal with the critique presented against embodied experience after covering one more aspect of it.

Above we have seen how schemas, frames and metaphorical expressions make meaning together. But how do they tie together? We saw examples of complex metaphors in the sentences discussed above. To make meaning, integrating the pre-language gestalts into wholes is certainly necessary. One suggested way we possibly do it is presented by the blending theory.

2.1.4 Gathering it all together – blending

Even in the few simple examples given above, we saw that multiple schemas mix to make meaning. Conceptual integration theory, the network theory of meaning, or the blending theory (it seems, as a Finnish proverb puts it, that a dear child has many names) suggests one way in which we do it. It focuses on blended cognitive models and meaning construction by various semantic and pragmatic phenomena (Coulson & Oakley 2005, 1512). The blending theory takes image-schemas and frames and the neurological structure underlying them as granted, and focuses on how these are used in processing complex meaning (Lakoff & Johnson 1980/2003, 261).

The theorists in this field see understanding and language as intermingled endeavors, and suggest our comprehension is structured by blends. Blends form from one or more input spaces, which are then connected (mapped is the term used by blending theorists) into a unified blended space (Coulson
2.1. MEANING AND MIND

Figure 2.4: Blending occurs when two or more input models are connected into a blended space. The grounding concept is borrowed from Langacker (2002) and attempts to account for the contextual aspects: participants, context and the speech event itself. (Image is an adaptation from Fauconnier 2002, the grounding addition by Coulson & Oakley 2005.)

& Oakley 2005, 1513). Turner (2001, 145) proposes that this new blend is a gestalt\textsuperscript{6} in itself; although properties of the input spaces may make their way into the blend, the result is still unique, “delivering meaning not available in either of them.”

The blending theory approaches construing meaning from the viewpoint of encoding-decoding and representations (Coulson & Oakley 2005, 1513; Coulson & Oakley 2000, 175), but also suggests an analogy between human lower-level visual system operation and building understanding from language (already implicitly visible in Lakoff & Johnson 1999, explicitly stated in Grady 2000, 337-339; Coulson 2006).

Fauconnier (2002) describes blends as structured by cognitive models and frames. They connect to both long-term schematic embodied conceptual knowledge (such as walking and talking) and long-term specific knowledge, not to forget immediate experience (knowledge of events, situations, etc.). Connections link elements across different mental spaces without implying

\textsuperscript{6}According to Wordnet 2.0 (Fellbaum 1998), gestalt: a configuration or pattern of elements so unified as a whole that it cannot be described merely as a sum of its parts.
that they possess similar features or properties as this is done. This process is illustrated in Figure 2.4, which also includes the concept of grounding to the contextual information present when the blend is executed. Joining grounding with blending is presented in Coulson & Oakley (2005).

On text level, blending works on many levels: blends can access multiple frames and image schemas; many metaphorical expressions join together into more complex metaphorical mappings (Lakoff & Johnson 1999, 49). This makes the blending theory extremely useful in mapping metaphorical thought across wider stretches of texts, and it is also possible to connect it to analyzing thematic structures within them. The approach provides interesting possibilities for working beyond sentence-level during text analysis as we see in Chapter 4 when dealing with themes near outsourcing.

2.1.5 Critical views of embodied experience

Although the theoretical part of this study attempts to rather reflect the properties of co-operative effort than those of an argument, we should also look into the critique made against embodied experience. Most critics accept the usefulness of cognitive linguistics as such, but do not acknowledge the idea of conventional metaphors put forth by Lakoff and Johnson. A full review of the critics is unfortunately beyond the scope of this study.

The counterarguments against embodied experience center on theoretical and philosophical disagreements with details of the cognitive-semantic work by Lakoff and Johnson. For the most part, the critics seem to fail to encompass the entire theory, but focus on single concepts or issues without relating them to the macro-perspective. Overall, I must agree with Gibbs Jr. (2003) when he stresses the importance of empirical work in assessing the validity of embodied experience.

Some opponents are concerned over the literal versus non-literal language dichotomy and truth values of sentences and, rather than accepting conventional metaphor, choose to propose a metaphor comprehension system based on a systematic disambiguation of non-literal expressions to literal, and thus, true, original meanings (Glucksberg & McGlone 1999, Glucksberg & Haught 2006, Sidiτis 2006, Stern 2006, Wearing 2006). The problem here is that formal logic implying literal meaning and resorting to thinking of the human mind in terms of it might not be the way our brain works. This
is noted by Ritchie (2003), who also points out that the literalist approach utilizes circular reasoning.

Rakova (2002) claims that the Lakoffian embodied experience is a relativist and reductionist approach. She focuses on the impossibility of linking the container schema to early childhood experiences and the problematic analogy that reduces human visual system as human language system. This tendency for visualist bias in the Western cultures is also pointed out by Babson (2005, 25), who goes on to suggest that the universality of primary metaphors is yet to be explored exhaustively (but cf. Meier & Robinson 2006, Meier et al. 2007). In my view they have a point here, since the multimodal system of language processing is certainly underrepresented in the embodiment theory, which stresses the role of the visual. The visual system, as such, is the most studied sense [citation needed], which may well be one of the reasons underlying the strong link between it and cognitive semantics.

The problem in Rakova’s arguments is credibility. To take an example, her argument against the universality of the metaphorical construct knowing is seeing by using Finnish as an example case of a language where the metaphorical link does not exist is erroneous (Finnish does have this link). Her approach to the claim is also methodologically problematic, as she has apparently asked only one native speaker of Finnish for an opinion and used a single English sentence as her material for research. A further problem is that she expects one-to-one translatability with the English and the Finnish expressions discussed (Rakova 2002, 225-226). The example fails to prove her point, instead strengthening those of Johnson and Lakoff. The more important problems are philosophical. As noted in Johnson & Lakoff (2002), Rakova tries to mistakenly place the standpoint of embodied realism somewhere along the familiar black-or-white nature versus nurture and rationalist versus empiricist dichotomies, postulating that one cannot have the one when having the other.

McGlone (2007) criticizes the often intuitive approach used in interpretation of cognitive semantics in general and conventional metaphor in particular. In arguing against the conceptual metaphor he mostly stresses the relevance of studying context and etymology when determining meaning, emphasizing that reasoning by intuition alone is not enough to interpret metaphorical connections. He makes a clear distinction between literal and non-literal language and stresses active, reflective understanding of metaphorical in-
ference as a measure of the existence of conceptual metaphors (the primary metaphors such as good is up, knowing is seeing presented earlier). The problem is that he himself, at least partially, resorts to intuitive claims and examples when making this criticism, and has obviously not looked into the conceptual metaphor theory deeply enough to observe features of metaphorical language, such as the definition of dead metaphors (see Lakoff & Johnson 1999, 123-125 for the concept), when he stresses the importance of etymological research.

Despite the critique, even Rakova (2002, 215) notes:

The indisputable advantage of cognitive linguistics is that it places questions of metaphor and polysemy in the broader perspective of human cognition and conceptual organization.

As it is, in my view the critics have not been able to construct or formulate a better description of embodied experience, or suggest viable alternatives. Brain studies conducted using functional magnetic resonance imaging (fMRI) may reveal much of what happens in different regions of the brain when people process metaphorical information, but it must be remembered that they have their limitations. As the brain is, in the words of Feldman, “a massively parallel” system, much depends on the given input (i.e., research formulation, test environment) and accuracy of measurement.

This is where we leave meaning and mind and focus on metaphorical language and polysemy in its cultural frames. Next, we’ll acquaint ourselves with some aspects of meaning and culture and communication as a system.

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2.2 Meaning and culture

During the last section, we learned that our abstract thought is, for the most part, metaphorical, and saw the cognitive foundations of meaning. In this section, I will outline communication and meaning-making from a cultural viewpoint. I will focus on theories and concepts near Critical Discourse Analysis (CDA), explaining concepts close by and noting some details on the approach itself.

To understand the borders of discourse analysis, a look into some basic definitions used in the field is in place. They are discussed in the following sub-sections. After this section, I will discuss possibilities for combining the cognitive and the sociological views of language. First, let’s see what CDA is about.

2.2.1 Critical discourse analysis

Sociologically, CDA has its roots in the Critical Linguistics of the 1970s (Chilton & Wodak 2005, xi) and has since become a multidisciplinary endeavor. It is an explaining theory that focuses on ideological and cultural aspects of meaning, emphasizing the importance of demystification of texts\(^8\) in an usually two-staged analysis procedure. In analysis, texts are (1) interpreted, indicating manipulative textual constructs and (2) connected to explaining social and cultural contexts (O’Halloran 2003, 1-2). The most important point in CDA is not a certain approach or a direction of analysis as such, but the ‘C’: it is a critical approach that aims to address and expose social problems (van Dijk 2001b, 352).

Linguistically, CDA is close to a functional approach on language, which focuses on how language realizes interaction and ideas. Let’s explore the linguistic basis of CDA, systemic-functional linguistics.

Halliday & Matthiessen (2004) define language through three metafunctions, illustrated in Figure 2.5. First, they see it as a tool that constructs human experience through categories which then turn into taxonomies, thus providing a theory of human experience. This aspect of language is the ideational metafunction, which divides into two components: the experiential

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\(^8\)Throughout this work I will be referring to texts. Here, and from now on I use the term ‘text’ in its broadest sense, referring to all produced items of communication in all possible formats, be it written, spoken, or depicted.
The textual metafunction, "language as an instrument"

The ideational metafunction, "language as reflection"

The interpersonal metafunction, "language as action"

experiential logical

**Figure 2.5:** The three metafunctions of language: textual, ideational and interpersonal.

(creation of perceived processes) and the logical (representation of the relationships of those processes) (1999, 511; 2004, 22).

Second, they continue that simultaneous with the ideational metafunction, or "language as reflection" language is also used as a means for enacting personal and social relationships; it is used when persuading and expressing attitudes towards addressees or issues discussed. This aspect of language is the interpersonal metafunction, "language as action", both interactive and personal.

Third and last, they define textual metafunction, which relates to the way in which texts are construed. This third metafunction can be seen as the building block of both the ideational and the interpersonal metafunctions in that it helps construct sequences of discourse by creating cohesion and continuity. It also relates to our competence to form, evaluate and follow texts beyond sentence-level (2004, 29-30). The Hallidayan perspective thus focuses on the structural, lexicographical, aspects of language as the means of realizing interaction and thought and organizing communication and
experience through language. The analysis in this study will focus on the domains of the ideational and interpersonal metafunctions.

Sociologically and thus also ideologically, CDA is influenced by the Marxist Frankfurt school of communication studies represented by theorists such as Horkheimer and Adorno, the tradition continued by sociologists such as Althusser, Bourdieu, Foucault and Habermas (Mattelart & Mattelart 1998, 58, 63-64, 78). The definitions of ideology and concepts of power, representation and domination discussed later on in this section stem from this background.

### 2.2.2 Meaning in media

Due to its sociological background, CDA sees mass media texts as particularly interesting because control of mass media and access to it is integral in building social power bases in the information age (van Dijk 1995, 11). In this view, CDA echoes the Habermasian public sphere, seeing the media as a public space where meanings are fast to get across and can be controlled (Fairclough 2005, 58), although one might argue that the growing interaction especially in new media is a trend that transforms or even obliterates old control mechanisms. News items become social venues for acting out ideologies and attitudes. On textual level, this manifests as a rich process of choice: omitting or choosing not to omit themes, participants and aspects of discussion.

To bring the focus on newspapers, the newspaper story is a genre in itself and sports several subgenres – the personal voice of columns differs widely from that of neutral business news reporting. ben Aaron (2005, 86, 90) notes that CDA has been mostly focusing on ‘hard news’ stories (reports on current, occurred events), pointing out that ignoring ‘soft news’ that focus on trends and human interest stories might leave out a number of literary devices. In addition, she lists several formulae for news reporting. To take an example, one of them is the *New York Times* structure:

- anecdotal lead
- quote from an expert
- “nut graph”
- sides of the various participants
Structural guidelines such as this one most likely help to ensure predictability in the news format and also assist in creating reading paths, suggesting what is important and what should be skimmed (see ben Aaron 2005, O’Halloran 2003 for more detailed description). Bell (1991, 12-14) concurs with ben Aaron on the stylistical differences of soft and hard news and lists multiple genres and styles present within a single newspaper. He notes that all texts besides advertisements are called editorials (which further divide into service information, opinion and news). In texts analysis, it is useful to mark these conventionalized categories since, besides cueing readers, they are also likely to influence the reporting style of journalists.

All this cueing and organizing is done within a discursive frame. This is why understanding the definitions of discourse, text, ideology and power are essential in understanding the sociological foundations of CDA. Let’s look at them next.

2.2.3 Discourse, text and ideology

In cognitive terms, discourses are containers for texts and places where ideologies are acted out and relationships of power are manifest in linguistic and non-linguistic acts. Understanding what and why discourses are is integral in understanding CDA.

Fairclough (1995, 18) defines two main meanings of discourse, one predominant in language studies and the other in post-structuralist social theory. Where linguistic study sees discourse as (1) the interaction between people in real social situations and defines it as social action and interaction (as defined in Section 2.2.1 above), the post-structuralist social theory defines discourse as (2) a means for construing social reality, perceived as a form of knowledge. Kress and van Leeuwen emphasize interpretation but still trail this in defining discourses as socially constructed knowledges of reality, which have been developed in particular social contexts to the interests of the social agents within that context (2001, 4-5).

Fairclough aims to bridge the gap between real-life language use and social theories by combining the linguistic and social theoretic meanings of discourse. He does this by using the Hallidayan interpersonal and ideational metafunctions of language (1995, 18-19). He sets discourses as simplifying agents in both political and economic relations (2005, 55) and associates the
situational meaning of discourse with the interpersonal function and the concept of genre, and the socio-cultural meaning to the ideational function of language. Mirroring this duality of meaning, Fairclough divides the actual analysis methods of discourse analysis in two: intertextual analysis and linguistic analysis (1995, 68-71, 75-102, 202).

In my study, I will be mostly focusing on the intertextual aspect of discourse analysis, which is examined in this section. My research approach is discussed in detail before analysis in Chapter 4. As discourse as a concept is wide and often used, its use in this study is also in need of defining. For the purposes of this study, I use discourse in its wider, sociological sense, to denote discourses as interlinked connections of texts, which help create social knowledges and realities. This definition relates to the concept of ideology, discussed next.

What is ideology?

This question is not an easy one. The conceptual development and etymology of ideology would make an interesting book of its own. The definitions and conceptions vary from the original ‘science of ideas’ coined by Count Destutt de Tracy in the late 18th century (van Dijk 2003, 6) to various definitions of ideology in society and politics.

CDA follows the Marxist definition of ideology as a tool for social reproduction when defining it through the words of Thompson as meaning in the service of power (Fairclough 1995, 45). Ideologies, in this view, are propositions that generally figure as implicit assumptions in texts contributing to production or reproduction of unequal relations of power and tools for forming and maintaining relations of domination. These relations may be implicit or explicit, unwritten or written (Fairclough 1995, 14-15). To clarify, people may, and indeed do, reproduce power relations without actively recognizing that they are doing so.

van Dijk’s definition of ideology focuses on the cognitive aspects, ideology as special form of social cognition shared by social groups. Ideologies thus form the basis of the social representations and practices of group mem-

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9 Fairclough has recently noted that he sees genre as a way of interacting and he combines genres with discourses and styles. He sees these as connecting categories that frame discussions (Fairclough 2005, 64).

10 Many articles and books have been written on this subject: van Dijk (2003) is a good introductory read on ideology as it connects to CDA.
bers, including their discourses, which also serve as means of ideological production and reproduction. Ideologies are shared, non-personal beliefs, which form the basis of the belief systems or social representations of specific groups (2001a, 11). van Dijk summarizes ideologies as fundamental beliefs of a group and its members (van Dijk 2003, 7).

Barthes (1970, 67) criticizes the bourgeois society for a tendency to naturalize cultural signs and ideology, also joining myths and non-linguistic signs (such as fashion) with ideologies as ways of propagating and naturalizing them (emphasis mine):

[... ] on peut attaquer le monde et l’alienation idéologique de notre monde quotidien, à bien des niveaux [... ] Au lieu de reconnaître que la culture est un système immotivé de significations, la société bourgeoise donne toujours des signes comme justifiés par la nature ou la raison.  

Ideology links with the ways in which events and participants are represented. Representations are ideological-linguistic processes which are constructed by making text-level choices, but also by choosing the subjects from which to write about. In this choosing and writing, alternative representations that might offer a different perspective are backgrounded or omitted (Fairclough 1995, 27). Texts become canonized in the culture they represent, offering the same viewpoints in a constrained format, over and over again. This relates to the concept of hegemony12 and relationships of power within a given society.13

On text and interaction level, ideologies are acted out by choices and categorization. Creating groups and categorizing between in-persons and out-persons becomes relevant. van Dijk (2003, 43-44) lists several questions relating to group membership:

- Membership: Who are we? Who belongs to us? Who can be admitted?
- Activities: What are we doing, planning? What is expected of us?
- Aims: Why are we doing this? What do we want to achieve?

11 One might attack today’s world and ideological alienation of it on many levels. Instead of acknowledging that culture is a system motivated by significations, the bourgeois society always justifies signs by nature or reason. (My translation.)

12 The concept of hegemony is from Gramsci (1971).

13 See for example Bourdieu (1991) for more information on power.
• Norms: What is good or bad, allowed or not in what we do?
• Relations: Who are our friends or enemies? Where do we stand in society?
• Resources: What do we have that others don’t? What don’t we have what others do have?

Here we see how ideologies tie together with identities and how identity can be played with when manipulating ideological positions. van Dijk continues that these basic stances lead to four basic manipulative possibilities in any ideological discourse:

1. Emphasize positive things about Us.
2. Emphasize negative things about Them.
3. De-emphasize negative things about Us.
4. De-emphasize positive things about Them.

These strategies help to form group spirit and create a duality, Us versus Them, shown in Figure 2.6.

Naturalization is a phenomenon closely linked with ideologies and canonization. It is also described by Barthes above. It is the active or passive viewing of ideological representations as non-ideological, often referred to as ‘common-sense’, and thus taken for granted as unquestioned background knowledge. Discourse analysis, especially CDA, tries to uncover these naturalizations by studying the dialectic relationship between micro-events on a textual level on the one hand, and macro-structures, such as relations of power, on the other.

As we can see from the broadness of the above descriptions of ideology ranging from the innocent ‘science of ideas’ to a sword wielded by the hegemony, ideology is notoriously hard to define. Barthes brings interesting additions to the Marxist tradition, joining myths with ideologies as vehicles of propagating and naturalizing them. Both see ideology in terms of power and as a means of control. CDA seeks to discover these relationships of power by examining texts for what is written but also for what is left unsaid. In text-level analysis, this is achieved by paying attention to agency, passive voice, viewpoints taken and omissions made.
Figure 2.6: Strategies in group creation.
To understand the link between intertextuality, text and context, a closer focus on discourses as containers of texts is needed. We will do that after discussing intertextuality.

**Intertextuality, interdiscursivity and intertextual analysis**

As we saw above, language use always includes the aspects of social identities, social relations and systems of knowledge and belief. All texts contribute, foregrounding one aspect or another, to the shaping of society and culture (Fairclough 1992, 55). How are these factors examined in CDA, then? One aspect that is important is detecting dialogue. In CDA, this dialogue is called intertextuality.

Intertextuality is defined by Fairclough (1995, 85) as a dimension of text. Along the lines of Bakhtin (Dentith 1995, 41-24, 141), he concludes that texts are dialogic: always reflections, echoes, contradictions or portrayals of other texts, borrowing and lending, sometimes in explicit ways, sometimes implicit. This is intertextuality, and also the core of representation. Fairclough continues drawing from Bakhtin in saying that texts form historical continuums which add to “chains of speech communication” (Fairclough 1995, 85). Discourse as an entity, including intertextuality, is illustrated in Figure 2.7 adapted from Fairclough (1995), with my addition that sets out to describe intertextuality by transparent elements which color each other as they overlap.

Examining texts through the intertextual perspective is useful when defining changes in text types and in interpreting them, as well as when considering the participatory role of the reader in the meaning-making process. The method focuses on examining the borders of discourse practice and text (also seen in Figure 2.7).

Intertextual analysis is strongly diachronic, set in time. The analysis is done from the viewpoint of discourse practice; the processes of discourses are examined by looking into genres and orders of discourses, noting how various discourses are mixed (interdicsursivity) and texts consumed in relation to each other (intertextuality) as time passes (Fairclough 1995, 85-86). At text level, intertextuality may be examined by looking into the themes and subject areas presented in each text and seeing how these themes mingle and change in the contact. Intertextuality is used as an aspect of the texts I analyze in
Figure 2.7: Aspects of discourse illustrated. Discourse is always colored by social and discursive practices. Intertextuality is illustrated here by texts that overlap each other and color each other as they do so. (The figure is adapted from Fairclough 1995.)
this study by charting the themes featuring outsourcing as described in more detail in Chapter 4.

The notion of interdiscursivity comes close to that of blending described in Section 2.1.2. Fairclough (1992, 68) borrows from French discourse analysts "who suggest that ‘interdiscourse’, the complex interdependent configuration of discursive formations, has primacy over its parts and has properties which are not predictable from its parts.” This bears a striking resemblance to the properties of blends, which, as we remember from Section 2.1.2, can become more than their constituents. The resemblance is furthermore strengthened by his example of mixed genres which combine elements of each other.

Differences do, however, exist. Fairclough (1992, 68) sees interdiscursivity structurally, emphasizing its properties as the foundation of discursive events, whereas the blending theory relates to conceptual integration, the actual process that takes place in the brain when meanings mix. Wodak and Weiss (2005, 127) define interdiscursivity as the interconnectedness and overlapping of discourses. In this respect then, interdiscursivity is to discourses as intertextuality is to texts.

Text in context

What is the place of text in this all? The post-structuralist social theory posits that texts do not exist in a vacuum, but are influenced by the power relations and ideologies that exist within the society in which they are produced. In the words of Wodak and Weiss, “individual texts always relate to past or even present events” (Wodak & Weiss 2005, 127). Discourse consists of texts influenced by the discursive and social practices surrounding them. In contrast, the linguistic definition of text is quite different: with a more structural view, Halliday & Matthiessen tie up lexicogrammar with semantics in defining text as “a unit of meaning [....] that is realized by clauses [...] being located on different strata – semantics (the stratum of meaning) and lexicogrammar (the stratum of wording)” (2004, 7, 587).

In these definitions, we see the orientational difference between linguistic and sociological definition of texts. Where the sociological idea of text tends to focus on the meta-level and sociological implications of their use, the linguistic view focuses on text-level realization of these approaches.

If considering the different agents participating in the production and
Figure 2.8: The network of text. A synthesis of different aspects and agents that have to be considered when considering texts and, ultimately, formation of meaning in any given society.
consumption of each text, we may say that texts are made, produced and interpreted as described in Figure 2.8. It centers on texts as units of meaning open to and dependent on situational, producational and receptional aspects. Interpretation varies according to these parameters and is thus open for change, creating variation and alternative views. As viewpoint alters the object of study, the texts become polysemous and polyphonic, connoted with alternate meanings. This gives leeway to change.

The critical sociological school sees these factors molded by structures and power and domination. According to Barthes, these structures are infused in the structure and meanings of language itself (1990, 27-33). Very similar to the implications of the Hallidayan systemic-functional theory (see 2.2.1), Barthes’ claim suggests that the power of the textual function superimposes those of the ideational and interpersonal functions – text-level realizations such as the grammatical, conventionalized gender and entrenched categorization and division of gender and professions (such as lakimies, ‘law man’ in Finnish, indicating all lawyers are male) are ready examples of this viewpoint. In this view, textual structure, as a tool and a building block for ideational and interpersonal functions of language, also becomes their constraint. Historical formation of language affects making new meaning, also when the historical meaning is considered obsolete or discriminating in modern society. From the standpoint of communication theories discussing power and hegemony, this perspective taken to extremity is quite pessimistic, as it suggests that no truly binary opposite to hegemony can exist; the language used always reflects the existing hegemony, thus continuing to represent and enforce it.

The reality, however, is not necessarily as bleak as Barthes suggests. Not all aspects of power are solidified in language. Other, often implicit, modes of language, such as irony, come to rescue here. The role and stance of the consumer of any given text is also relevant. Rossi (2004) follows Hall (1999, 1992) when speaking of vastakarvaan lukeminen, ‘reading against the grain’14 when interpreting texts. Interpretation is the reader’s strength. This viewpoint bounces the deciding role of the meaning-making process to the reader, pointing out that the reader always has the power of interpretation. And here we come to one of the problems in CDA: it emphasizes the interpretation of the analyst and does not consider different readings of texts. This has been pointed out as the main weakness of CDA: for a theory that

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14My translation.
emphasizes social cognition, the approach deals remarkably little with the
cognitive processes themselves (O’Halloran 2003, Wodak & Chilton 2005). In
the next section, we discuss possible ways of addressing these problems.

2.3 CDA + cognitive linguistics = ♥?

In the sections above, we have seen both the cognitive and the social face
of meaning. If combined, I believe they would complement each other.
Combining the cognitive and the sociological is important if we are to
construct a view on language and change within it that encompasses both
the nature and the nurture in us.

Critical Discourse Analysis defines discourse as social action or practice
that constructs social reality and the objects, situations, identities and relations
within it (Chilton 2005, 22). Bakhtin speaks of the ‘concrete living totality’ of
language (1984, 181). As an approach, CDA has successfully joined some
aspects of this living totality with critical social theories, thus showing the
socio-cultural motivations that frame it. But, as mentioned above, one of
CDA’s weaknesses has been its disregard for the interpretative power of
the reader and further, not accounting for the cognitive aspects of language
pointed out in many articles (see for example Koller 2005, O’Halloran 2003,
Wodak 2006).

This poses a problem because, ultimately, all theories regarding socio-
cultural phenomena are us: people interacting together. Discourses, texts
or groups do not interact. People do. Language and other modalities just
mediate, perhaps changing that interaction in the process. As such, CDA can
indicate constructs that may or may not manipulate the reader. But it does
not explain why readers allow themselves to be manipulated, or take stance
on the cognitive basis manipulation builds on.

Notably, the critique for lack of cognitive insight within CDA has come
from the few cognitively oriented analysts within the field itself. As pointed
out by Wodak (2006, 181):

Discourse analysts agree to a large extent that the complex in-
terrelations between discourse and society cannot be analyzed
adequately unless linguistic and sociological approaches are com-
...combined. However, with very few exceptions, theories on cognition are explicitly rejected and therefore not perceived as relevant.

Wodak goes on to problematize knowledge to be obtained from cognition (the so called ‘black box’ phenomenon) (2006, 180), but yet suggests that interdisciplinary research is needed when analyzing and thus understanding social situations. She sees combining the social and the cognitive as integral if this is to be achieved. Of particular interest to us is the work of Veronika Koller (2005, 2003), focusing on combining CDA with cognitive linguistics using a critical, corpus-based approach. Other venues have been opened up by O’Halloran (2003), whose focus is on studying the mystifying aspects of texts and operationalizing the reader.

How to combine cognitive linguistics with CDA? Koller (2005, 200) points out that the early cognitive-semantic approach furthered by Lakoff and Johnson in *Metaphors we live by* (1980/2003) was not originally so far removed from the critical social approach in the first place, as the authors then saw metaphors as creators of “social realities” and as “self-fulfilling prophecies” (1980/2003, 156). She provides both qualitative and quantitative corpus-based evidence that ideological representations of business acquisitions and mergers are, in fact, created in a text by clusters of metaphorical utterances by analyzing metaphors of war and other metaphorical expressions found in business discourse on mergers and acquisitions (2005, 2003).

The philosophic-theoretical possibilities for joining the two approaches may lie in the Foucauldian middle-ground, the concept of representation. Foucault sees the process of producing knowledge through discourse riddled with questions relating to both power and mind (Foucault 1969, 1990). For Koller, this epitomizes in the definition of discourse: she takes an opposite stand to Chouliaraki & Fairclough (1999) in that “social life is not a product of discourse but rather a product of cognition, which is, in turn, reflected in discourse” (Koller 2005, 207). She sees that, although any account on the cognitive aspects of discourse is necessarily mediated (ie. cannot be studied directly), at least trying to account for the cognitive is necessary if CDA is to cover all aspects of ideology and its reproduction (Koller 2005, 220). The standpoint is similar to mine.

And what of meaning, then? If taking a pragmatic view, we may cut corners and make a long story short by accepting Wittgenstein’s definition in
Philosophical Investigations 43: “the meaning of a word is its use in the language” (1953/2001). If, for CDA, the main focus truly is on the ‘C’, critical, methods used in the field should primarily benefit that end. However, justifying the cognitive means fully may require restructuring and repositioning CDA in terms of philosophy. As for my own opinion, I see that the mystery of meaning should be tackled as diversely as possible.

Above we have seen some takes on meaning and a glimpse of how and why it is made socially. These definitions and theories will help us in analyzing outsourcing from both socio-cultural and cognitive perspectives. If we want to study meaning at its richest and accept Wittgenstein’s viewpoint to its fullest, we must look beyond authoritative dictionaries to language and texts as they are used and produced in actual situations. Next, we will see how that was done in this study and if CDA + cognitive linguistics equals ♥ in our case.
3 Data collection and methods used

In this chapter, we emerge from the theoretical world into the practical. It deals with formulating the research approach and collecting the data for performing the study. As Wittgenstein said in Section 2.3, meaning equals use in language. That is why I chose to study the changing meaning of *outsourcing* in real-world data, using multiple methods to ensure validity. First, I discuss the methods I am about to use, considering the aspects of validity and reliability. Since I apply some descriptive statistics and non-parametric significance tests, I will also briefly discuss the meaning of numbers in human sciences. Second, I continue with methods, formulation and data sources in Sections 3.2, 3.3 and 3.4.

3.1 Validity, reliability and measuring in human sciences

Validity of data can be established through the measures used to obtain it. A valid measure is one which measures what it is supposed to measure (Hair et al. 2006, 3). Validity implies reliability, consistency of the gathered data. Reliability can be defined as consistency of measurements or the measuring instrument (Hair et al. 2006, 3). Reliability does not imply validity. That is, a reliable measure is measuring something consistently, but not necessarily what it is supposed to be measuring.¹

The reason I am delving into this is that I use some descriptive statistics to contextualize the data in this study and some simple statistical operations and significance calculation when dealing with questionnaire data. Numbers

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¹From these basics, several types of validity and reliability may be derived. See basic books on statistics, such as Hair et al. (2006) for further information.
have also come to signify importance in science – as noted in Porter (1996, 72), Lord Kelvin once remarked:

When you can measure what you are speaking about and express it in numbers you know something about it; but when you cannot measure it in numbers, your knowledge is of a meagre and unsatisfactory kind.

My own view is that – especially since people tend to place heavy trust in numbers (an eloquent depiction of this can be found in Porter 1996) – it must be remembered that statistical significance, along with other tenets often placed in quantitative research, is only a thing agreed upon among scientists. To hold it as anything else – such as a magical borderline or fixed physical constant, would be profoundly unscientific. It is a methodological helper that allows for coherent results, provided that research formulation and correct operationalization is in order.

Here we might ask why use numbers at all in human sciences. Human sciences are not hard sciences and deal less frequently with scaled numbers or measurements, the ones one can add up with or subtract from. The reason for this is in plain sight: although correlation might be visible, causality is hard to track in an open, complex system, where unknown variables are numerous and innumerable other factors, such as ethics of the research formulations that often use informants as data sources, must also be considered. The risks are that only things that can be measured, reliably or less reliably, rise up in status and are deemed important – when we should, in fact, look to the things that are important but not yet measurable.²

Similarly, just because it is possible to measure something, it is not necessarily wise to do so. For example, to calculate a mean of meaning for one word is possible. It would hardly be relevant, however, nor would it be interesting – the result would be an abstraction and misinterpretation in itself, a value that never actually exists and that does not yield any significant, descriptive information of the data. Correct operationalization, or converting things we want to measure to a form that is easily measurable, can, nevertheless, be a useful and descriptive way of handling large sets of data. To receive clusters of meanings which would change according to factors such as time, social...

²The original quote is from Robert McNamara: *The challenge is to make the important measurable, not the measurable important.*
status of evaluators, or that of the contexts evaluated, would be an entirely different matter than a ‘mean of meaning’.

To see the changing journey and developments around outsourcing and tell something of business terminology change, several methodological tools were needed. I chose to combine both quantitative and qualitative data in a study based on a mixed-methods approach used in the field of psychology and described below. Despite the reservations listed above, I feel that some aspects of quantitative, ‘hard’ sciences can be applied in the study of humanities, with proper care and acknowledgment of the various error sources present. Reliability can be improved by using various methods of investigation. This is what I attempt to do in my study by borrowing from the methodologies of psychological research, which has been expanding its methodological reservoir with statistical tools since a paradigmatic change in the 1950s.

## 3.2 Mixed methods approach

A methodological design which originally emerged in the field of psychological studies in the late 1950s, the mixed-methods approach combines both qualitative and quantitative methods to confirm findings from different data sources. The approach is also known as a multi-methodological synthesis or integrating design (Creswell 2003, 210). Gathering data from various sources using both qualitative and quantitative methods helps control both the validity and the reliability of any study, which is why I chose to explore several methods for the purposes of my own. Having done that, I finally selected discourse analysis and a questionnaire study as my qualitative methods and corpus analysis combined with descriptive statistics for a more quantitative view. Later on in the process, I chose to include some aspects of cognitive semantics to spice up the discourse analysis.

Creswell (2003, 211) defines four decisions, formulated as questions, which help in designing a mixed-methods study strategy:

1. What is the implementation sequence of the quantitative and qualitative data collection in the proposed study?
2. What priority will be given to the quantitative and qualitative data collection and analysis?
3. At what stage in the research project will the quantitative and qualitative data and findings be integrated?

4. Will an overall theoretical perspective be used in the study?

Using these questions as guidelines, I chose to (1) study both qualitative and quantitative data simultaneously, giving (2) priority to qualitative data collection. The two types of data are (3) integrated throughout the analysis and when drawing conclusions in a way best described as a “concurrent nested strategy” (Creswell 2003, 218), shown in Figure 3.1. I have several theories underlying the study and thus several viewpoints to compare and collate the collected data with. The analysis of media texts is done using (4) a critical, cognitive-linguistic approach. Methodologically, besides text analysis, both corpus methods and a questionnaire study are used. Using multiple methods will hopefully yield a richer and more reliable description of outsourcing while providing tentative results as to how these different perspectives and methodological tools can be combined.

By using the embedded quantitative approach, and the longitudinal aspect of the study, I try to uncover how the semantic field of outsourcing has changed during the observed period. In it, I collect a sample of texts from the defined time period and then perform quantitative analysis on the collected material. Coupled with this, discourse and metaphor analysis utilizing both CDA and the cognitive tradition of linguistic study is used to track down changes in the quantitatively organized material. Additional to this, WebCorp, a web-based corpus tool which allows for searching up to 200 web-pages and limiting the search to one site, will be used in finding and analyzing close collocates to outsourcing.

Discourse analysis focuses mostly on the intertextual analysis of discourses near outsourcing (cf. Section 2.2.3), charting themes, participants and metaphors emerging from the texts. The approach is thus cognitive, critical and systemic-functional.

Using yet another approach formulated to illustrate how outsourcing is rated and associated by persons other than myself, the study also features a brief questionnaire asking informants to rate the word both on a negative to positive scale (1-5) and by association using free-form text fields. The basis of this formulation goes back to Osgood’s emotional ‘good’ - ‘bad’ space, discussed in detail in Osgood et al. (1957). The results obtained using
Figure 3.1: The research layout: concurrent nested strategy. The research approach combines quantitative data with qualitative analysis.
these methods will be analyzed and integrated throughout Chapter 4 and summarized in Chapter 5.

The methods selected work at different levels of inquiry and complement each other. Where descriptive statistics and corpus methods chart the frequency and close collocates of *outsourcing* and are likely to reveal larger trends along longer time-lines, they also provide a framework for discourse analysis. This in turn reveals rich qualitative information at a text-specific level, charting emerging discourses and use cases which are minuscule enough to disappear in quantitative analysis alone. The questionnaire further helps to chart the development and semantic field of *outsourcing*, offering a brief cross-sectional plunge to the emotional content and associations close to *outsourcing*.

### 3.3 Gathering data for text and corpus analysis

Material that is both representative and analyzable in a relatively short period of time is difficult to come by, but was needed to reliably track possible changes in the semantic field of *outsourcing*. After careful search and evaluation, the *NY Times* was chosen as the source of discourse-analytical data mining. The material was approached using two different methods – discourse analysis with a cognitive edge and corpus analysis of the same data. The purpose was to see whether the results yielded supported each other or not. As discourse analysis has often been criticized from producing one-viewpoint-only and linguistic-specific interpretations, this dual approach was also needed to investigate this criticism and to see if analyst-specific subjectivity could be ameliorated (cf. Section 2.2.2).

News portals proved to be an extremely useful solution to data mining, both from the viewpoints of data reliability and ease of collecting and categorizing the texts, as the material is already in electronic form. It must be noted, however, that using texts from media sources alone may also pose a threat to the generalizability of received results to other genres. It may also be argued that news texts are central to the spread of new ideas in a given culture and thus also important mediums for creating and giving birth to new meaning. In this case, I also considered the strengths of the material (extensiveness, searchability, reliability, easy access) to outweigh the weakness.
The questionnaire part of this study focuses more on subjective interpretations of the meaning of outsourcing. It aims to do its part in ameliorating the possible one-sidedness of the media material.

### 3.3.1 The New York Times

The online news archives of BBC (2006) and The New York Times (2008) were chosen for closer inspection as possible text sources. Because the NY Times’ portal had a more sophisticated user interface for filtering searches through limiting queries (by header and by date, among other options), with material available starting from 1881, it was chosen as the primary source for both tracking the development of outsourcing longitudinally from 1981 to the end of 2007 (using frequencies and intertextual analysis) and for tracking the emergence of outsourcing to headlines and its developments there using a discourse-analytical approach.

Searching the archives of the NY Times with the query word outsourcing produced 1,511 hits altogether and 104 hits in headlines. When counting in other forms, outsource (374 hits, 16 in headlines), outsourced (373 hits, 12 in headlines), outsourcer (15 hits, 4 in headlines), we get 2,273 hits, of which less than 10 per cent are duplicate (ie. the word features both in the headline and the text body, and/or different forms feature in a single article). Another interesting feature are the blogs available on the site, which are also searchable and produced hundreds of hits using outsourcing as a search term.

Unfortunately, the large number of texts necessitated limiting detailed text analysis to headlines only. As ben Aaron (2005) notes, the staggering amount of texts available often restricts the depth of analysis, and concentration tends to be more on headlines and the first paragraph of any given news item. This approach mimics the habits of a casual reader, who, thanks to the learned default structure of a news story reads the headlines and possibly the leads more closely than other sections of text following later on (see Section 2.3 and ben Aaron 2005, 90). A cursory intertextual analysis that charts the main discourse types and changes in discursive practices was, however, performed on the entire material, which helps provide reasonably solid contextual frames for outsourcing.
3.3.2 Webcorp

WebCorp (The Research and Development Unit for English Studies 2006) is an online corpus tool that is an easily accessible interface to corpus studies performed by analyzing material from the World Wide Web. The tool is still in an experimental phase, and at the moment of conducting the study only allowed searching up to 200 web pages. Despite this limitation, it still has a powerful advanced user interface enabling limiting searches to certain web sites or time-lines only. WebCorp was used as a supplementary tool for analyzing news archive material from the NY Times online article database time-stamped in 2006.

The caveat of this tool is that the texts extracted may not be a representative sample of all existing material. It does, however, provide a somewhat interesting dimension for tentative pilot analysis and was chosen for this study, keeping the limitations in mind. By searching the close collocates of outsourcing, we will see whether the corpus tool findings are similar to those of the discourse analysis and questionnaire results received from a informant group. Similarity would enhance the reliability of discourse analysis, which has often been criticized for lending way to one interpretation only and focusing on the interpretation of the researcher, not so much on that of the reader and consumer of texts (as mentioned in earlier theoretical introduction in Section 2.3). This is also one of the main reasons why I wanted to include a questionnaire, the formulation of which is described next.

3.4 Developing the questionnaire

Questionnaire formulation must be done with great care to maintain both the validity and reliability of the study. I chose to make my questionnaire simple and short to maintain informant interest (see Gillham 2000 for further details on questionnaire formulation).

The selection of informants is always an integral part of developing a questionnaire. Participants relatively fluent or native in English were needed for this study. In the ideal situation the group to answer the questionnaire would be a large, demographic sample of native English speakers. Unfortunately, the means (and funds) for gathering such a sample were well out of my reach.

After some hesitation on which way of collecting the participants would be
the best (I first started the formulation of the questionnaire using convenient, captive participants,\(^3\) then considered taking an e-mailed snowball sample\(^4\)), I chose to make the questionnaire web-based. In the end, a link to the questionnaire was sent to Translat, a mailing list for translators, on May 24, 2006. The respondent group was not ideal but would still most likely consist of fluent English speakers who were at least somewhat familiar with the Anglo-American culture. Additionally, as translators, the respondents are important mediators of language and change and are frequently tackling with translation problems and new terminology. This provided an interesting possibility for contrastive analysis, which, for the purposes of this study, I chose later to ignore.

Figure 3.2 shows the two-part questionnaire format. Part I asks informants to evaluate words on a closed scale ranging from 1 to 5, where 1 means that the rater thinks the word is extremely negative and 5 that the word is extremely positive. Part II contains the same words and a free-form text field, where participants are asked to fill in the first word they think of when seeing each displayed word. The results of the questionnaire will be cross-compared with each other and with the results of the text analysis so that answers from parts I and II complement each other. The questionnaire in its entirety is included as Appendix A.

*Outsourcing* is the primary lexeme of interest for the purposes of this study but to avoid effects of anticipation, I chose to include other words chosen among business terminology in the questionnaire as well. They are also shown in Figure 3.2.

There is a University of Helsinki WWW questionnaire service available, but I found it lacking in features necessary for my specific purposes, such as editing the questionnaire layout (cf. University of Helsinki 2006). For executing the study, I designed a web-based questionnaire and coded its functionality using Perl programming language.

Among the threats to the validity and reliability of the questionnaire results is a possible priming effect, the activation of particular associations.

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\(^3\)Convenience sampling means that the participants are conveniently there. Captive participants are monitored throughout the experiment, which can take place for example in a class room.

\(^4\)A snowball sample is gathered for example by sending the questionnaire to interested participants and then benefiting from their contacts by asking them to forward it to persons they themselves deem suitable.
resulting from the sequential format where one word follows the other. The dilemma faced here is that several words are absolutely needed to avoid informant anticipation, because the knowledge that the researcher focuses on a specific word might skew the results. In order to lessen the priming effect, I formulated the questionnaire so that each word has its own page. Gillham (2000, 39) gives good advice on questionnaire layout, which I followed, and removed all possible disturbing elements from the questionnaire WWW-pages, including the word "Submit" and arrows from all the form buttons used in the pages.

Next, with research formulation firmly in place, we move on to analysis.
4 Analysis

What happens to outsourcing? In this chapter, we will chart outsourcing using a cognitive and a discourse-analytic approach.

To get a clear view of all events while retaining a consistent and readable study structure, I choose to present some results of the study in non-chronological order. We will first take a cognitive approach to the lexeme itself, charting out + source from the viewpoint of cognitive semantics and the blending theory described earlier in Section 2.1, also mixing in some etymological observations using dictionary definitions. The notation used in figures is based on ECG. Here it must be stressed that some observations I make when dealing with the cognitive side of outsourcing in Section 4.1 pull from the information charted later on in the analysis. This especially holds for the contextual and culture-dependent information – such as blends – beyond outsourcing as a single, self-standing lexeme.

The intertextual analysis carried out in Section 4.2 using articles from the NY Times and Sections 4.3 and 4.4 containing questionnaire results and a brief corpus analysis underlie Section 4.1.

After considering the big picture gained through intertextual analysis, we take a more detailed look into the data in Section 4.2.3, using discourse-analytic methods on the headlines that contain outsourcing, focusing on both the syntactic and semantic aspects of the data under analysis. This sees the end of text analysis of the NY Times. The findings will be further complemented by a questionnaire and corpus search results, presented in Sections 4.3 and 4.4, respectively. All the things noted during this chapter will be discussed in Chapter 5.
Figure 4.1: A simplified depiction of the relationships and actions required by outsourcing described using a notation based loosely on ECG.

4.1 Outsourcing from a cognitive perspective

Cognitively, outsourcing is close to containment and the container metaphors described in Lakoff & Johnson 1999, 380-381 and the topological and orientational image schemas presented in Section 2.1.2 of this study. When iterating through the roles and agents required by the lexeme, it seems that it networks with conceptions of businesses as containers, similar to schemas which set out to describe entities such as cities or countries as containers. I will now illustrate this important characteristic here by examining out- + source in more detail.
4.1.1 Modeling outsourcing

The most important aspects of this complex network of connections are depicted in somewhat simplified form in Figure 4.1, which I explain next.

The orientational prefix out indirectly refers to surfaces: a tangible object that has decipherable interior, exterior and a surface separating them. This topological image schema evokes the basic metaphorical construct in which abstract objects such as companies, countries or cities are made comprehensible and tangible entities by objectifying them: **Companies are containers, countries are containers and cities are containers.** In the case of outsourcing, this spatial out links to contextual and referential information beyond the actual lexeme: besides referencing to the object properties given to companies, it also comes to refer to the spatial positions of the participants involved in the action of outsourcing. In order to decipher outsourcing as a single lexeme, we have to be aware of this contextual information.

This reference is explained by the concept of **cultural framing**, discussed earlier in Section 2.1.2. Cultural frames set outsourcing to the domain of business and, in doing so, evoke the roles, actions and participants familiar to that domain. These are all seen in Figure 4.1 as well. Using the Source-Path-Goal schema (SPG schema), outsourcing is the process in which trajectors travel from one entity into something or somewhere else. The goal of this movement is not expressed by the lexeme itself – it is connotative or dependent on surrounding contextual information. That is why the goal container is presumed, but marked with an ‘?’, as it is not obligatory.

Looking at Figure 4.1, we can say that outsourcing requires:

- company as source container (s.Container)
- ?company as goal container (g.Container)

We may say that outsourcing is the path between these agents. Additionally, the participants and actions of the business frame call for:

- **work** (employee, tasks and compensation) as trajector

Note that when outsourcing, employee, tasks and compensation are possibly interchangeable trajectors. This relationship between them is metonymic if we see work as a schema, an entity that requires all these roles and materials to explain itself (it actually requires more, I am simplifying).
4.1. OUTSOURCING FROM A COGNITIVE PERSPECTIVE

Note also how, in most instances, the goal of the SPG schema is not the same for all trajectors: in some cases, employees may be heading for unemployment or different companies than the items of work that make their way to other companies. This means that the depiction above in Figure 4.1 is crucially incomplete.

Besides looking at outsourcing as an act between companies, we may also replace companies with countries:

- COUNTRY AS SOURCE CONTAINER (s.Container)
- COUNTRY AS GOAL CONTAINER (g.Container)
- WORK (EMPLOYEE, TASKS, COMPENSATION) AS TRAJECTOR

This replacement gives leeway to an ideological and, depending on the context, possibly also patriotic Us versus Them group setting. This leads us to the rather more complicated, but still simplified network described in Figure 4.2, which includes two frames, the frame of nation and the frame of business. Let’s look at it in detail.

In addition to earlier Figure 4.1, Figure 4.2 includes two contextual frames: BUSINESS and NATION. According to blending theory, these frames evoke the roles, participants and actions relevant for each of them (cf. Sections 2.1.2 and 2.1.4). For our purposes, I have sketched out the relationship of the schema Country to schemas Us and Them in the frame of nation.

The containers may possess various roles described with role.Container in the middle of the figure. These roles lie within the borderline of the frame of business and the frame of nation and allow source and goal containers all the roles necessary: business and country for source container, business, country and unemployment for goal container for the various trajectors involved in outsourcing. This means that role.Container also allows us to cover in a simplified fashion the different destination of the employee, as the red line indicates the goal in both schema Work and role.Container: a more complete depiction would require factoring in nested SPG schemas with possibly separate destinations for each trajector.

The notation is, of course, simplified in that it only accounts for a specific instance of the Us versus Them dichotomy, nationalism. As a description of nationalism, it is complete for our purposes only, and by no means a complete depiction of the grounds of the Us versus Them setting in nationalism, as
Figure 4.2: More complicated, but still simplified depiction of the relationships of outsourcing.
it only focuses on the topological aspects of countries as containers, and ignores many more finely-grained instances not relevant for our purposes (the figure does not, for example, sketch out immigration and immigrants). What it does illustrate is that selection between Us and Them in the context of outsourcing tends to happen according to repositioning work from one country container to the other. The frame of nation mixes with the frame of business as Us is likened to the source container, while the goal container becomes Them.

How did outsourcing come to connote all this culturally sensitive information? Some aspects of its roots are sketched out next.

4.1.2 The history of outsourcing – etymological observations

<table>
<thead>
<tr>
<th>Table 4.1: OED Online entries for outsourcing and other relevant items</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ OUT- + SOURCE v.1] trans. To obtain (goods, a service, etc.) by contract from an outside source; to contract (work) out.</td>
</tr>
<tr>
<td>Also intr. [ OUTSOURCE v. + -ING1.] The action or practice of obtaining goods or services by contract from outside sources.</td>
</tr>
<tr>
<td>[ OUTSOURCE v. + -ED1.] Obtained by contract from a outside source; externally contracted.</td>
</tr>
<tr>
<td>[ OUTSOURCE v. + -ER1.] A person or organization which provides goods or services by contract from outside a particular organization or area; an external supplier.</td>
</tr>
</tbody>
</table>

As already described in the introduction and, for clarity, in Table 4.1 again, the OED Online places the first appearance of outsource in 1979 in the Journal of Royal Soc. Arts 127 141/1. The etymology of the word can be tracked by the latter constituent of the compound out + source, which is most likely derived from earlier business language in the sense:

to obtain from a specified source; spec. of components (for a vehicle)
or from the nominalized form **sourcing**:

the obtaining of goods and components from a specified or understood source.

An entry from a 1960 *Business Week* recorded in *OED Online* explains the change in the meaning of **sourcing**:

Businessmen now refer to imports from foreign plants as “sourcing”, a term that until recently referred to company purchases from a domestic supplier.

A March 15th 1960 *Wall Street Journal* entry concurs on the foreign flavor:

There is a growing tendency toward foreign “sourcing”, the purchase or production of finished goods or components abroad.

This would suggest that **outsource** and **outsourcing** were adopted relatively late to replace **sourcing**, almost 20 years after one of the specialized newspapers had marked a change. *Sourcing* seems connected with manufacture of tangible goods. Note how the binary opposition foreign:domestic features in these entries, creating a group-specification where Us becomes the U.S. and Them becomes other countries, the foreigners. Recall how this was depicted on a more abstract level using the ECG notation in Section 4.1.

To contrast, a newer, although not as prestigious, definition, *The Free On-line Dictionary of Computing*’s March 1995 entry takes a more specific approach in defining **outsourcing**. Note how this specialized dictionary does not take a partial stance to the geographical location of the company that is the goal of the outsourcing activity, evoking instead only the company-level SPG schema where **outsourcing** is an event occurring solely on business-to-business, company-level:

Paying another company to provide services which a company might otherwise have employed its own staff to perform, eg. software development.

The scope of the Us vs. Them setting here, if it exists, is different: the company-level definition still activates the **business** frame (employee from the schema Work presented earlier in Figure 4.2), but does not explicitly state that the goal of the trajector, here **services**, might be abroad. The frame of the **nation** is not explicitly activated.
4.1.3 *Outsourcing* and friends

<table>
<thead>
<tr>
<th>Lexeme</th>
<th>Hits in Google search engine</th>
</tr>
</thead>
<tbody>
<tr>
<td>outsourcing</td>
<td>44,400,000</td>
</tr>
<tr>
<td>insourcing</td>
<td>312,000</td>
</tr>
<tr>
<td>intersourcing</td>
<td>10,800</td>
</tr>
<tr>
<td>upsourcing</td>
<td>1,600</td>
</tr>
<tr>
<td>downsourcing</td>
<td>193</td>
</tr>
<tr>
<td>rightsourcing</td>
<td>5,840</td>
</tr>
<tr>
<td>leftsourcing</td>
<td>2</td>
</tr>
<tr>
<td>wrongsourcing</td>
<td>39</td>
</tr>
<tr>
<td>oversourcing</td>
<td>58</td>
</tr>
<tr>
<td>undersourcing</td>
<td>36</td>
</tr>
<tr>
<td>crowdsourcing</td>
<td>1,850,000</td>
</tr>
<tr>
<td>global sourcing</td>
<td>1,040,000</td>
</tr>
<tr>
<td>around sourcing</td>
<td>1,820 (some ambiguous)</td>
</tr>
</tbody>
</table>

Table 4.2: Neologisms directly connected with *outsourcing*.

In the previous section we saw the image-schematic aspects near *outsourcing* and the way in which *outsourcing* is active as a path for several objectified items to travel on to various destinations. Above, we acquainted ourselves with dictionary entries on *outsourcing* and lexemes close to it. But what is the role of *outsourcing* when coining new meaning through novel lexemes, neologisms?

As also discussed later on in Section 4.2.2, *outsourcing* sprouts new prefixed expressions within the *NY Times*. From it may be suggested that the development is even more prolific elsewhere, and, indeed, a quick search engine query reveals that neologisms such as *insourcing, upsourcing, oversourcing* and *undersourcing* abound on the internet. Even *intersourcing* has been suggested (10,800 hits in Google in April 2008), although, possibly due to its slightly
taboo minimal pair,¹ it has not gained as much success mainstream as others have. *Crowdsourcing* is a boom term in Web 2.0.²

The most interesting cognitive pointer here seems to be that this diversification in meaning is plainly traceable to the topological aspects of *out* in *outsourcing*. Thus the cognitive aspect of this spread warrants further exploration, and will be discussed in more detail in Chapter 5.

Some of the lexemes presented in the figure are prolific in the *NY Times*, some scarce, but found on the internet. Note how nearly all of these newly coined words make use of the topological and orientational possibilities created by *outsourcing*. A list of the neologisms found is shown in Table 4.2. The specific developments in the *NY Times* are discussed in Section 4.2.2 and possibilities for further research are indicated in Chapter 5.

Next, after this cognitive analysis, we take a look at the diachronic developments within *The New York Times*.

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¹ Words or phrases deviating from another by only one phonological element form a minimal pair. To illustrate, *fair* and *hair* make one.
² According to Wikipedia (2008): Crowdsourcing is a neologism for the act of taking a task traditionally performed by an employee or contractor, and outsourcing it to an undefined, generally large group of people, in the form of an open call.
4.2 Intertextual observations from *The New York Times*

4.2.1 The main features examined

Fairclough (1992, 232-233) sets defining questions for studying the intertextual chains discussed earlier in Section 2.2:

- What sorts of transformation does this (type of) discourse sample undergo?
- Are the intertextual chains and transformations relatively stable, or are they shifting, or contested?
- Are there signs that the text producer anticipates more than one sort of audience?
- Are there traces of irony or metadiscourse (discourse relating to the discourse itself)?

These are the questions I will be focusing on during intertextual analysis of the articles found in *The New York Times*.

Context-wise, my approach is close to Wodak’s discourse-historical approach (2001). We begin with charting the diacronic development of *outsourcing* in the newspaper, collecting examples of typical stories and occurrences from each time span in Section 4.2.2. After that, we take a closer look at headline language.

4.2.2 Outsourcing by date

In this section, I will examine *outsourcing* in a diachronic manner, observing the different discursive frames and themes it is associated with. I will go roughly by the decade, charting out development in the 1980s, 1990s and from 2000 up to the end of 2007, giving examples from stories and characterizing the themes and usage of *outsourcing* using excerpts from texts. Of course, due to the extensive amount of articles, all aspects and discourses from this timeline cannot be covered. These findings and the main discourses will, at the end, be collated. To help contextualize the scope and spread
Figure 4.3: Frequency of all articles containing *outsourcing* in the *NY Times* from the beginning of 1981 to the end of December 2007.
of outsourcing in the NY Times, Figure 4.3 shows the frequency of all texts containing outsourcing from its first occurrence in October 1981 to the end of 2007.

The early years in the auto-industry: 1981 – 1989, 43 articles

The first occurrence of outsourcing in the NY Times dates to October 14th, 1981. OED Online shows that the tendency of development of outsourcing seems to be from the verb form towards nominalization. This is the development in the NY Times as well, where outsourcing follows outsource in the data in 1981, the adjective outsourced and noun outsourcer joining in 1984 and 1987, respectively. Outsourcing is by no means free from conflict in the 1980’s – many occurrences are in texts dealing with labor issues or union strikes, creating tension between employers and employees. The word is first associated with the U.S. automobile industry, and remains so linked during the 1980s. To illustrate this development, let’s take a look at some example cases.

G.M. SHIFT: OUTSIDE SUPPLIERS (John Holusha, October 14, 1981) sees a Mr. Smith characterizing and justifying outsourcing:

“It’s a matter of being competitive in the marketplace,” Mr. Smith said, after predicting that the practice, known as “outsourcing,” would become more common throughout the American automobile industry. He said that as a result of the General Motors effort, some of its plants might close.

In AT FORD, A QUIET REVOLUTION UNFOLDS (John Holusha, September 11, 1983) Holusha places outsourcing within the auto-industry:

Outsourcing is auto-industry jargon for purchasing components or whole cars from suppliers outside the company and usually applies to areas where costs are lower. G.M. has plans to import about 300,000 very small cars from its Japanese affiliates Isuzu and Suzuki and to assemble another 200,000 on the West Coast in a joint venture with Toyota.

The agents and participants close to the domain of business – employers, employees and competitors are easily traced. The articles feature and compare auto-industry companies and usually single them out by name. Discerning agents and participants around outsourcing is easy – the texts center around two auto-industry giants, General Motors and Ford, and the
auto-industry labor union. In the same article, a Harvard Business School professor makes notes on the impact of using different outsourcing strategies, implying “aggressive” outsourcing is bad for labor relations, suggesting the Us versus Them struggle here is employee versus employer:

“There is a big difference between G.M. and Ford in their stances on labor relations,” observed Professor Salter. “G.M. is much more aggressive in outsourcing, which puts labor in jeopardy. Ford has chosen to run a different kind of experiment. They are putting a higher priority on industrial relations even if it gives them a problem on production economics. Ford clearly hopes to make labor relations a competitive advantage.”

But a November 14th 1984 article by Philip H. Dougherty marks a turning point: the scope of outsourcing starts to change when the advertising industry adopts the term: the industry sees old practices back in use, renamed as outsourcing:

Some advertisers will be returning to the old days of just after World War II, when ad agencies served as their marketing departments, too, Philip H. Geier Jr., chairman and chief executive of the Interpublic Group of Companies, predicted here today.

Note how, in the same article, outsourcing is redefined – when the auto-industry saw it as purchasing goods, we are now talking about services. Note also how Geier uses an extremely topological approach when defining outsourcing, also benefiting from a place for industry metonymy in using Detroit to replace the U.S. auto industry located at that city:

The new buzzword for it will be “outsourcing,” Mr. Geier said. He credited Detroit for the word, describing going outside one’s company for services.

The active attempt at redefining core work, the agents and benefits involved is shown in:

And finally, Mr. Geier said, getting the talent from the agency without putting the personnel on the payroll is “gaining leverage without the overhead costs.”

What are the overhead costs then? The answer lies in the 1990s.
A new dimension in workforce – the 1990’s, 285 articles

Outsourcing dwindles away from the data in the late 1980s (see Figure 4.3). During the early 1990s occurrences, the lexeme stays strictly within business pages of the NY Times: it is mostly associated with company news such as sales and acquisitions. Some variation still exists: the first years of 1990s go in recession-themed discussion and still feature the auto-industry versus labor union talks familiar from the 1980s – the theme that continues throughout the entire observed time period, although, later on, it gets backgrounded by other themes.

In a August 12th 1990 recession-themed article metaphorically dubbed Dancing Past the Recession, Joel Kurzman presents outsourcing as a highly metaphorical “key tactic for surviving economic peril”, noting in the lead that “[t]he nation, it seems fair to say, has never been in quite the same kind of economic bind it is in now.” This is the first time the frame of the nation is evoked near outsourcing.

Beginning in fall 1992, outsourcing centers itself again, when the business news topics containing outsourcing move across IT and service sectors. By spring 1996 the process is wide-spread: in Need to Cut Costs? Order Out; Outsourcing Saves Money, but Labor Is Frustrated Keith Bradsher notes:

But outsourcing is a prime cost-saving strategy throughout the economy, from the insurance company that replaces its security guards and cafeteria workers with outside contractors to manufacturing giants like the Boeing Company, which buys airplane parts from factories in Japan, Mexico and Xian, China, that its own employees once fabricated in the United States.

Indeed, by 1996 outsourcing as a phenomenon has spread so wide that it starts to break barriers and emerge from the business section of the newspaper and enter general and regional news. At the same time, as seen in the excerpt above, the frame of the nation emerges again, creating a new Us versus Them opposition: foreign versus domestic.

In mid-1990s, opposing journalist voices start to mount up and outsourcing makes its first appearances outside ‘hard’ business news, featuring in columns and in-depth articles. The humorous text written by the two-time Pulitzer Prize winning columnist Russel Baker quoted below is, in its entirety, a particularly brilliant example of utilizing the topological dimensions of
outsourcing to mock the need for novel lexemes within the domain of business. Even more ironic, perhaps, is the fact that insourcing, the topological antonym of outsourcing discussed earlier in Section 4.1.2, may possibly stem from this critical suggestion in the April 13th 1996 column:

How, we might ask these utterers of gobbledygook, does outsourcing differ from insourcing? Is it possible to have upsourcing and downsourcing? Why is industry forever downsizing but never upsizing? What about upsidedownsizing? Rightside upsizing? Insideoutsourcing?

To study this development more deeply, I took Baker’s suggestion seriously and checked how outsourcing differs from insourcing. Insourcing is new enough not to be listed in dictionaries, but, starting from 2004, tracking the NY Times produces 9 hits besides Baker’s column, staging insourcing to job market discourse in the sense of job flow back to the United States caused by foreign investment.

The meaning of this new word is shaky at best; it is also used in contexts where companies create corner offices in India. The difference to outsourcing is that companies do not transfer business activities to other companies, but benefit from cheap labor by moving their own activities to other countries. National business becomes global business. A third meaning to insourcing is letting employees, including those of subcontracting companies, take care of non-central business activities (logistics, for example) so that they are physically situated within company premises while working although not on company payroll.

It also seems that Baker was perceptive in suggesting upsourcing, as it is now used as a registered product name to brandish “a new way of interactive outsourcing” by Afni (2007), and has also spread to more general use, as 1,600 Google hits testify in April 2008. The topological and orientational aspects discussed earlier in Section 4.1.2 seem to be a breeding ground for these new instances.

In another excerpt, Baker makes an acerbic note on globalization discourse when connected with outsourcing (Observer: Yellow Peril’s Return published December 7, 1996):

Are we not constantly told that business now operates on a global scale? Is the need to compete globally not constantly cited
to justify downsizing, outsourcing and undercutting workers’ benefits? Are we not constantly exhorted to stop thinking of the economy as a local or national affair and to start thinking of it as global?

By the end of the 1990s, outsourcing as a phenomenon has spread from the corporate world into the national and international: to supporting federal IT-functions and healthcare, even to the United Nations’ organizational structure. In the 2000s, as we will soon see, the contexts around it diversify even more.

Politics, outsourced: 2000 – 2007, 1183 articles

The 2000s open up with the deflation of the IT business bubble which results in news featuring thrift and cuts in the business sector dominating the scene until the end of 2003. The early years of the decade also see business jargon, outsourcing among it, spread to public education and academia. In 2001 outsourcing and attempts at efficiency travel to politics and military affairs, when Signaling Change, Bush Picks 3 Executives for Pentagon Jobs (April 25, 2001):

The nominees “have been persistent advocates of outsourcing, relying more on the marketplace and re-engineering the core military functions so they perform more efficiently,” said Loren Thompson, chief operating officer of the Lexington Institute, a military analysis group.

In the ensuing deregulation discourse, the Bush administration sides with the business community, while consumer, labor and environmental organizations stand in opposition. The discourse on loosening regulatory practices in the workplace, consumer issues and even privatizing military functions and prisons starts in 2001, and continues through the rest of the observed time period. In Some Experts Fear Political Influence on Crime Data Agencies (Fox Butterfield, September 22, 2002):

Alfred Blumstein, a professor of statistics and criminology at Carnegie Mellon University, said that outsourcing the analysis of crime statistics “seems inappropriate in the extreme,” because it could lead to political abuses.
On a lighter note, outsourcing continues its saga in the columnist section:

When you send out the dry cleaning or order takeout food for dinner, you’re outsourcing as any corporation. So why not also get your new year’s resolutions from a pro?

This suggestion by Daniel Akst (ON THE CONTRARY; No resolutions? Outsource Them, January 6, 2002) playfully suggests outsourcing new year’s resolutions to a professional, but, at the same time, shifts the usage of outsourcing to a new direction, bringing it close to everyday experiences of individuals, thus naturalizing it.

By 2002, the global aspect of outsourcing starts to rise steadily – it associates mainly with India and China. Opposing voices and irony, not to forget metadiscourse, are first to be found mainly from the Opinion section of the NY Times, although IT professionals get a few statements in the business section as well. In Layoffs, Sugarcoated (July 29, 2003), Gary Chaison notes, much in line with the 1996 Russel Baker column cited earlier:

Employers are “outsourcing jobs” and “freeing up” the labor force. Such euphemisms remind me of “rightsizing” instead of “downsizing,” and “furloughing” workers instead of “laying them off.”

Elsewhere, expert opinions get prestige space when discussing the undoubtedly post September 11th lexeme “cyberterrorism” and its threat when moving IT-functions and software development abroad. Note how the self-interest of the professionals speaking is markedly noted in Experts See Vulnerability As Outsiders Code Software (John Schwartz, January 6, 2003):

Some of these concerns over the practice, known as outsourcing, are being raised by people with an obvious self-interest – for example, programmers who have seen their livelihoods shift to less expensive operations overseas. And the companies providing outsourcing services argue that they take all necessary precautions to limit risk. But the question of whether the booming business in exporting high-tech jobs is heightening the risk of theft, sabotage or cyberterrorism from rogue programmers has been raised in discussions at the White House, before Congress and in boardrooms.
By 2004, the opinion section of the *NY Times* swells with criticism and talk of the job flow out of the United States. *Outsourcing* is no longer affiliated with manufacture and goods only; services and high-paying jobs are affected as well. It is this foreign outsourcing that particularly sparks political debate during 2004, a presidential election year. This is the culmination point for the Us versus Them debate where Us is the worker in the United States and Them, not featured in person earlier, are the workers in India and China.

In his February 29, 2004 article 30 Little Turtles, Thomas Friedman tries to take a more cosmopolitan view and see beyond the nationalist concept of work, pleading for the traditional concept of free trade and arguing that low-wage jobs are not needed in the United States and that sharing them means safety:

> What am I saying here? That it’s more important for young Indians to have jobs than Americans? Never. But I am saying that there is more to outsourcing than just economics. There’s also geopolitics. It is inevitable in a networked world that our economy is going to shed certain low-wage, low-prestige jobs. To the extent that they go to places like India or Pakistan – where they are viewed as high-wage, high-prestige jobs – we make not only a more prosperous world, but a safer world for our own 20-year-olds.

In the domain of business, outsourcing gains a new perspective when news from booming business in India starts to appear after 2005. Friedman, in general, advocates a global and de-nationalist view on outsourcing, claiming that since there is no “out” where to source to any longer, we should use “around sourcing” instead of outsourcing (*Out Is Over*, Thomas L. Friedman, May 19, 2006). The change in the view is stark – just a few years earlier, Friedman suggested that “[b]oth [Indian] Infosys and Al Qaeda challenge America: Infosys by competing for U.S. jobs through outsourcing, and Al Qaeda by threatening U.S. lives through terrorism.” (*Origin of Species*, March 14, 2004)

This is not the only connection with war, threat or terrorism – the theme rises up again as journalists criticize the privatization of the U.S. army for several reasons: according to them accountability in war crimes, for instance, does not hold same for outsourced troops. *Outsourcing* no longer only applies to manouvreable goods or business services. It has become immaterialized in a way that makes it possible to outsource responsibility:
It’s one thing for the military to outsource food and laundry services to private firms, as it started doing aggressively in the 1990’s, but it’s quite another to outsource the actual fighting. That is what the Pentagon is perilously close to doing in Iraq.

Defense Secretary Donald Rumsfeld has pledged that the Pentagon will keep looking for ways to “outsource and privatize.” When it comes to core security and combat roles, this is ill advised. The Pentagon should be recruiting and training more soldiers, rather than running the risk of creating a new breed of mercenaries. *(Privatizing Warfare, April 21, 2004)*

Note here, how the frame of the nation and national security becomes the core for military force as well. Other opinions exist as well, this one drawing its credibility and justification, besides professionalism, from further back in history in framing the national army force as the actual anomaly:

Peter W. Singer, a fellow at the Brookings Institution and author of “Corporate Warriors: The Rise of the Privatized Military Industry” (Cornell University Press, 2003), contends that the use of for-profit foreign fighters has been the norm, not the exception, since the dawn of warfare. Only with the emergence of powerful national armies in the last three centuries has the word “mercenary” taken on such negative connotations.

“We have this idealized vision of war as being men in uniform fighting for the political cause of their nation-state,” he said. “That is actually an anomaly. It describes only the last 300 years.” *(The Nation; ‘Outsourced’ or ‘Mercenary,’ He’s No Soldier, James Dao, 24 April 2004)*

Bob Herbert’s column on February 11th 2005 makes an intertextual jump in describing an article from another newspaper focusing on practices connected to outsourcing and the army:

The title of Ms. Mayer’s article is “Outsourcing Torture.” It’s a detailed account of the frightening and extremely secretive U.S. program known as “extraordinary rendition.”

This theme soon gets its following as the dark side of the 2001 deregulation is revealed:

But a senior official talked about it to The Times’s Douglas Jehl and David Johnston, saying he wanted to rebut assertions that the
United States was putting prisoners in the hands of outlaw regimes for the specific purpose of having someone else torture them. Sadly, his explanation, reported on Sunday, simply confirmed that the Bush administration has been outsourcing torture and intends to keep doing it. (*Torture by Proxy*, March 8, 2005)

The effects of government outsourcing are postulated to have a transforming force on individual privacy and thus, on the society in general. In these excerpts, Us becomes the individual and Them an irresponsible governmental rule:

> The Privacy Act of 1974, enacted in the wake of revelations about covert domestic spying by the F.B.I., the Army and other agencies, gave individuals new rights to know and to correct information that the government was collecting about them, but the government’s current predilection for outsourcing data-gathering to private companies has changed the rules of the game.

> [...] “By outsourcing the collection of records, the government doesn’t have to ensure the data is accurate, or have any provisions to correct it in the same way it would under the Privacy Act. There are no limits on how the information can be interpreted, all this at a time when law enforcement, domestic intelligence and foreign intelligence are becoming more interlinked.” (*Nonstop Scrutiny, as Orwell Foresaw*, Michiko Kakutani, January 25, 2005)

Unlike the harmless-sounding wordplay of 1996, the *outsourcing* of 2005 and 2006 makes it to columns and editorials in an entirely different tone:

> Just as Bill Clinton pranced around questions about marijuana use at Oxford during the ’92 campaign by saying he had never broken the laws of his country, so Condoleezza Rice pranced around questions about outsourcing torture by suggesting that President Bush had never broken the laws of his country.

> But in Bill’s case, he was only talking about smoking a little joint, while Condi is talking about snatching people off the street and throwing them into lethal joints. (*Torturing the Facts*, Maureen Dowd, December 7, 2005)

In these examples, *outsourcing* has drifted far from its original context. On the one hand it has shifted from a process of buying goods from company-external sources to a transformative tool on several fields, above a loophole
allowing for circumventing democratically passed laws and regulations. On the other, it is also being used as a clever political tool by the Democrat presidential candidate John Kerry, who, under the 2004 elections, frames the post September 11th activities of the Bush administration in Afghanistan as “outsourcing the hunt for Mr. bin Laden.” The latter evolves into the hottest issue for debate in the pre- and aftermath of the 2004 presidential election campaign, the outsourcing of torture; consequently resulting in the overflow of the material of this study for 2004. Government outsourcing stays on the agenda all through to 2007, to the extent that the entire Bush administration is stamped by the practice as shown in this excerpt:

According to U.S. News & World Report, President Bush has told aides that he won’t respond in detail to the Iraq Study Group’s report because he doesn’t want to “outsource” the role of commander in chief.

That’s pretty ironic. You see, outsourcing of the government’s responsibilities — not to panels of supposed wise men, but to private companies with the right connections — has been one of the hallmarks of his administration. And privatization through outsourcing is one reason the administration has failed on so many fronts. (Outsourcer in Chief, Paul Krugman, December 11, 2006)

This discourse, besides focusing on the process of outsourcing, reflects back to the beginning days of the Bush administration and raises up an issue of possible corruption and conflicts of interest within the Republican party:

Political loyalists were installed throughout the government, regardless of qualifications. And the administration outsourced many government functions previously considered too sensitive to privatize: yesterday’s Times article begins with the case of CACI International, a private contractor hired, in spite of the obvious conflict of interest, to process cases of incompetence and fraud by private contractors. A few years earlier, CACI provided interrogators at Abu Ghraib. (The Green-Zoning of America, Paul Krugman, February 5, 2007)

In the 2000s, the discourses around outsourcing made a considerable shift from business to politics. These two frames blend in such a way we might actually say that the “outsourcing generals” recruited to the Bush administration in 2001 brought business visibly to national and international politics.
At the end of 2007, the focus in stories of outsourcing shifts to environmental issues, since outsourcing manufacture to China also means conveniently exporting greenhouse emissions there. That discourse, however, continues into 2008, so we will leave it, and focus next on outsourcing in headlines.

### 4.2.3 Outsourcing by headline

What happens when outsourcing hits the headlines?

The first headline emergence of outsourcing is in 1986 as Mack Reiterates ‘Outsourcing’ Plan (NY Times, January 25, 1986). After many years of quiet time and a few instances of outsourcing as a part of proper nouns (company names), a feature article focusing on outsourcing as a phenomenon appears in June, 1996, when the word starts a slow transfer from business discourse to general news, local news and opinions sections; and, from there, to headline success.

We will now see the developments of outsourcing as it enters the headlines of
the *NY Times*. The analysis focuses on syntactic aspects of headlines, charting both syntactic and semantic change. Figure 4.4 shows the frequencies of headlines containing *outsourcing* and other forms close by. Note how even the less used *outsource, outsourced* and *outsourcer* start to make their way into headlines. Most of these occurrences appear outside the business section of the *NY Times*. All the headlines containing *outsourcing* are listed in Appendix B.

As mentioned in the previous section, as a new lexeme, *outsourcing* gets re-interpreted several times. This is also the case in headlines. In 1996, when the phenomenon hits the headlines, simply *outsourcing* is not enough:

> Outsourcing, or Farming Out Work (*NY Times*, June 6, 1996).

Metaphorically, in ‘farming out’, *outsourcing* comes close to agriculture. Outside of the headlines containing the lexeme, *outsourcing* is explained as:

> When jobs flee (*NY Times*, January 2004)

or

> Economic effects of job migration (*NY Times*, December 2003).

Both of these examples emphasize the nature-like force of *outsourcing*. It is portrayed as an unstoppable phenomenon of nature by personifying jobs as migrating animals or human beings. They become trajectors on a trajectory of *outsourcing*. The phenomenon is thus naturalized, creating a myth suggesting *Economy is a force of nature*, and thus, unstoppable.

In the most prolific year for headlines containing *outsourcing*, it becomes human:

> Outsourcing comes to Summer Camp (*NY Times*, July 6, 2004)
> Outsourcing Is Another Threat to Jobs (*NY Times*, May 23, 2004)
> Modest Now, Russian Outsourcing Has Big Hopes (*NY Times*, December 15, 2004)
> Executive Life; Outsourcing Joins the M.B.A. Curriculum (*NY Times*, March 28, 2004)
These agentive sentences personify outsourcing into an independent actor. Metaphorically, in these headlines outsourcing is a human being, an independent entity capable of executing seeking, hoping and threatening actions. From these examples we see that as outsourcing becomes agentive, it also starts to possess, to feel, and to participate; to become metaphorical and to move from the domain of the ideational to that of the interpersonal (cf. Halliday & Matthiessen 2004, 586-658).

It also shifts in context, gaining metaphorical dimensions in politics and war:

Political Timing, Outsourced (NY Times, January 2004)

and


The latter headline sets Iraq as a passive receiver of an outsourcing activity, but the Agent that performs this action remains undefined, at least in the headline. It must be also noted that the syntactic function of outsourced in this context, as in many others, is ambivalent: it may be interpreted both as a noun modifier (“Outsourced Iraq”), a transitive verb that is missing an Agent (“Iraq, [was] outsourced by [Agent]”), or as an abbreviated intransitive verb construct (“Iraq [is] outsourced [but by whom?]”). This ambiguity is most probably a feature journalists are willing to play with. A deeper look into the article reveals that the theme is actually about outsourcing troops in Iraq, leading to trouble with accountability and masking actual loss of lives, as documented in more detail in the previous section. Queerly enough, the headline ‘Iraq’ stands metonymically either for the war on Iraq or for the U.S. troops and outsourced security personnel stationed there.

Other cases where outsourc* appears with entirely different agents and participants than in the “normal” business setting pop up in religion as well as in the everyday life during the festive season:

Short on Priests, U.S. Catholics Outsource Prayers to Indian Clergy (NY Times, June 13, 2004)

Personal Business; Long Christmas List? You Can Outsource It (NY Times, December 14, 2003)
In 2006, one person, president G.W. Bush, makes it to the headlines as the:

Outsourcer In Chief (*NY Times*, December 11, 2006).

### 4.2.4 Overview

Three main discursive frames can be discerned in comparing the material of the 1990s and 2000s. Figure 4.5 describes a loosely timelined frame of development in the discourses most closely surrounding outsourcing. The main discursive frame, the source of outsourcing, is business talk and the business section of the *NY Times*. All begins in the early 1981 with the auto-industry. After the early 1990s recession, the word starts to drift into general news, becoming associated with unemployment, globalization and the resulting social change on the one hand and – after 2001 – with Republican politics and warfare in Afghanistan and Iraq on the other. Outsourcing gets political as warfare gets outsourced.

As business becomes global, speeded by the faster internet technologies, the early Us versus Them setting, labour versus employer, loses weight as another, foreign versus domestic, gains hold. In the IT sector, single professionals speak for their own plight – unlike the well-organized labour unions of the auto-industry, which, toward the end of the observation section, seemed to be loosing support. This shift to globalization as a reason for cutting down benefits is not without its critics and opposing voices – Observer columnist Russell Baker quoted above is among them. The other viewpoint culminates in Thomas L. Friedman, a positivist advocate of free trade, who, at times, tries to adopt a de-nationalist view on the phenomenon of job flow abroad, bringing positive news from the developing countries and reasoning this is a normal transition in a post-industrial country.

How do the journalists account for their audience? Especially during the early years in the 1980s, besides clarifying the term otherwise, journalists tend to enclose outsourcing in quotation marks, which indicates they have deemed it unfamiliar and in need of further clarification - the term has not yet been assimilated by the readers of the *NY Times*. Further along the way, as outsourcing enters new discourses and gains new readers, it gets explained several times over, often metaphorically. Besides these explanations, quotation marks emerge to point out changes in the discursive context or the function of the word within that context. In the *NY Times*, the
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Figure 4.5: Discursive frames surrounding outsourcing on a time-line.
use of quotation marks emerges three times during the observation span; first when the novel word is introduced to the automobile industry, and then onwards when outsourcing makes new leaps within the business domain and to politics. With each shift of domain, outsourcing may also make a productional leap within the newspaper: this is when changes in readership and meaning of outsourcing occur as it is retranslated. Thus, it is feasible to suggest that the reasons for using quotes fit into Fairclough’s concept of discursive practice and transformation between genres and across discourses (see Fairclough 1995, 26-27, 33).

The most remarkable productional shift is the move from business to general and regional news (unemployment, healthcare and educational issues, offshoring of jobs to India) starting in late 1995 but most frequent during 2004. The most important intertextual shift is from general business discourse to discourses of unemployment and war, and even torture. During the 2004 U.S. presidential elections, outsourcing emerges as the flagship of unemployment issues, and the Kerry campaign stresses that during the war in Afghanistan, Osama bin Laden was hunted and lost due to outsourced troops. Outsourcing as a practice is later scapegoated as a transitive tool which allows the U.S. government to bypass laws and regulations when torturing suspected terrorists outside the U.S. borders. It becomes possible to outsource responsibility. At the same time, outsourcing blends the frame of  with the frame of , creating a new national business of war.

As outsourcing drifts from the domain of business to the domains of unemployment and war on the pages of the NY Times, the frequency of the typical business story of individual, identified companies that was most prevalent in early 1990s, has notably dropped. Insourcing and even “around sourcing” gain ground.

In the headlines, as outsourcing becomes the explicit Agent, the real, implicit Agents; the companies or governments that outsource, are veiled. Outsourcing stands in for them and becomes human instead of them. Using ‘mock Agents’, nominalizations, or using passive clauses and thus omitting Agents all together, are features typical of headline language use. They are also indicative of the power structures and hegemony in force within the society and of using language as a tool for building ideologies. In these headlines, we are invited to look into the phenomena and events the articles
describe through the frame of business, and through the process of outsourcing, not necessarily its participants.

In the case of headline language, the agentive power of outsourcing means the companies and the U.S. government involved in the activities described by the news articles never explicitly make their way into the place in the newspaper most people read: the headline. Fairclough points out these transitive constructs as mechanisms which background, and thus mystify, agency and responsibility (Fairclough 1995, 113). Additionally, outsourcing is retranslated in a mystifying way, likening it to a natural phenomenon and suggesting that it is thus unstoppable. In the previous section we also saw that outsourcing was presented as a strategy for “surviving peril” in the early 1990s recession.

Many other metaphorical aspects exist besides the ones pointed out in this headline analysis, but cannot unfortunately be charted in finer detail in this study. The aspects presented here and requirements for further investigation will be discussed further in Chapter 5. Next, we will see how outsourcing rates in a questionnaire, and whether the associations produced there come close to the themes studied above.
## 4.3 Questionnaire results

The questionnaire was set up because I needed information of associations of *outsourcing* beyond my own intuitive evaluation – it was necessary to see if the results obtained bore resemblance to those found during discourse analysis. I also wanted to explore as many methods as possible in order to find out which methods would work well together. The results of the questionnaire study exceeded the expectations, as we see next.

The URL containing the questionnaire (Appendix A) was mailed to a heavy-traffic translation list (see Translat 2006) and yielded 43 valid responses. Nine duplicate answers were weeded out by respondent IP address. There were no eliminations due to incomplete data because the form had been coded to remind users to enter a value in each field before proceeding on to the next one.

Majority of the informants speak Finnish as their first language. Only 9.3% of respondents reported English as their first language, which may set problems for the generalizability of this study. The rest are divided between Swedish (4.5%) and non-responses (5.0%). Most respondents defined their language variant either as American English (37.2%) or British English (44.2%).

Table 4.3 shows the results for questionnaire Part I, which asked the respondents to rate *outsourcing* on a closed, positive to negative scale. Mode,
or the most typical answer for this question was 2, which, together with the observation that 58.1% of all answers fall between 1 and 2, confirms that the majority of informants rate *outsourcing* as a negative word. None of the respondents rated the word as “extremely positive”.

Cross-comparing questionnaire Part I with the open format data of Part II corroborates this view (Figure 4.6). In questionnaire Part II, the respondents were asked to fill in the first word coming to mind when seeing each presented word. These results were then cross-compared with respondent answers in Part I. The comparison shown in Figure 4.6 displays all answers from both parts ordered by respondent. This matching allows us to track several recurring themes that the respondents associate with *outsourcing*.

The most frequent theme in the associative answers is **unemployment**, which the informants worded as ‘sacking’, ‘job loss’, ‘less jobs’ or ‘kick-them-out’. Not how the last association also evokes a metaphorical company from which employees are forcefully removed. Another recurring theme is **foreign**, which is itemized as ‘China’, ‘India’, ‘abroad’ and ‘foreign’. This domain is, of course, highly culture specific, limiting to Western-culture conception of foreign. These findings correspond with the older main discursive categories found during text analysis in Section 4.2.2. One informant identifies globalization, but none refer to war.

The phenomenon of outsourcing is also accessed through associations to expansion, exploitation and distribution. Neutral or positive answers tend to focus more on business activities, the domain of **business**, following the theme of business discourse linked with *outsourcing* in the text analysis, using expressions such as ‘subcontracting’ and ‘purchasing services’. The negative answers confront issues of unemployment, globalization/expansion and downsizing. Note that the respondents, who are all translators (or at least interested enough in translation to actively follow a mailing list with very heavy traffic) particularly associate freelancing with *outsourcing*. This is probably due to their own professional background.

‘Bad’ and ‘empty’, quite basic and emotionally loaded words, feature among the negative answers. Emerging categories are shown in Figure 4.7. Interestingly, it seems that negative ratings given in Part I correlate well with the positivity or negativity of the open format answers given in Part II. This correlation is significant at the 0.01 level, (the full statistical information is found from Appendix C). The results are further enforced if the answers
Figure 4.6: Questionnaire parts I and II cross-referenced, showing how raters’ evaluations of negativity given in Questionnaire part I match with connotations in Questionnaire part II.
Figure 4.7: Content analysis of answers and formed categories.
from questionnaire Part I are recoded so that evaluations from groups 1 to 2 (extremely negative, somewhat negative) are merged into one category, negative, evaluations from group 3 (not positive or negative) to group neutral and evaluations from groups 3 to 4 (somewhat positive to extremely positive) to group positive.

In its entirety, the questionnaire provided an interesting reinforcement to the discourse-analytical data. The only aspects that were completely missing from the associative answers but found during the intertextual analysis of the NY Times were the U.S. discourses on government outsourcing and its affiliations with war and torture. This analysis done, we now move on to WebCorp data.

4.4 A close-up using WebCorp

Typically, corpus linguistics in interested in the meanings, frequency, association patterns or co-occurrences and distributions of particular lexemes, focusing either on language structure or language use (Biber 1998, 1, 23-24). By investigating collocation, the patterned grouping of words in a given sample, we may be able to extract different senses of words from extremely large amounts of data. By definition, a corpus aims to be a representative sample of a given register or text type, in the words of Biber (1998, 12): “a large and principled collection of natural texts.” The sample used in this study does not fit the definition of Biber, being more a modest collection of news texts than a full-fledged corpus containing millions of words. The methods of inquiry, however, are corpus-based.

I will focus on the collocation of words prevalent near outsourcing, considering the possible syntactic functions each placement may take and seeing the possible distribution of senses from the sample described below. The aim is to see whether the findings support those of the discourse analysis of the same texts, which would improve the reliability of the former approach. Unfortunately the scope of this study does not permit a closer investigation of the data, which could yield interesting results.
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Table 4.4: WebCorp results for outsourcing for material within the *NY Times*, from pages updated during 2006. The corpus method helps to collect and analyze close collocates of *outsourcing*, which are shown here as frequencies according to distance to the left and to the right from *outsourcing*. 
4.4. **A CLOSE-UP USING WEBCORP**

**Outsourcing in Webcorp**

Development of *outsourcing* within the year 2006 was evaluated by searching for close collocates from the *NY Times* online service (The New York Times 2008) using the online corpus tool WebCorp (The Research and Development Unit for English Studies 2006) with advanced search parameters so that the pages included in the search must have been updated within 2006, with stopwords excluded. The search produced 82 concordances and accessed 200 web pages. The results of Table 4.4 indicate that the categories of *foreign* and *business* that emerged in the questionnaire results as well as in the intertextual analysis correspond with *outsourcing*’s close collocates *company*, *industry*, *software* and *Indian* of this corpus search. *War* came up during the intertextual analysis of all the material gathered from the *NY Times*.

From the different positions shown in Table 4.4, we see the different syntactic possibilities of *outsourcing* within the searched texts. Next, let’s look at the lexemes close to *outsourcing*.

**R1 position: *outsourcing* as noun modifier**

In this position, outsourcing has a modifying function, as a part of a compound noun, as in the examples below.

- outsourcing company/companies
- outsourcing industry
- outsourcing services (ambiguous)

**R1 position: *outsourcing* as a verb or a noun modifier**

In these examples, the syntactic function of *outsourcing* is ambivalent, it is either a verb or a noun modifier (“Cognizant moves its outsourcing services to a new level”).

- outsourcing jobs

In this configuration *outsourcing* can be either a verb (“Cognizant is outsourcing jobs”), or, *outsourcing* may belong to a compound, acting as a noun modifier (“Outsourcing jobs are hot in India”).
• outsourcing software

Here, outsourcing is most probably a verb or belongs to a compound noun (“Outsourcing software development”, “Outsourcing software service sector booms”).

• outsourcing services (ambiguous)

Here outsourcing is again most probably a compound noun “Cognizant moves its outsourcing services to a new level”, or a verb (“Outsourcing services gives extra edge”).

**L1 position: outsourcing as modified noun / compound noun**

This position gives outsourcing additional flavor – it modifies outsourcing and comes in Indian, as an offshore variety, and as services outsourcing. It must be remembered that outsourcing is not necessarily the head of these noun compounds – three or more-bodied complex nouns such as “Indian outsourcing services”, “offshore outsourcing possibilities” and “services outsourcing benefits” are also syntactically possible, but not visible here.

• Indian outsourcing

• offshore outsourcing

• services outsourcing

**Other observations**

Unfortunately, it is not possible to look into this data at the scope it would deserve. Collocates beyond immediate first-position left and right matches are left syntactically and functionally unclear unless the source texts are tagged and evaluated by hand, an endeavor well out of the scope of this study. Further study into the syntactic relationships would require a closer look at the concordances. It would be interesting to tag the found concordances with a cognitive schema-based notation (for example SPG would denote a Source-Path-Goal-schema), and see where outsourcing would lead. This brief glance did, however, show the company outsourcing likes to keep in the NY Times, and, at that, satisfies its purpose in this study.
5 Discussion

This study started out with two goals: (1) to suggest a mixed-method, cognitive approach to Critical Discourse Analysis and (2) to provide a description of the changing journey of outsourcing. Were they met?

In the previous chapter, I examined outsourcing through cognitive, discourse-analytical, questionnaire-based and corpus-linguistic perspectives. In this chapter, I will collate the results, and also discuss the process of obtaining them.

I will first summarize what we learned from the journey of outsourcing in *The New York Times* and from the data obtained from the informants of the questionnaire. I will then move on to discussing the cognitive background of outsourcing. Throughout this discussion, I will indicate gaps in the analysis above, which may translate into fruitful paths for further research. After considering the analysis, I will go through the positive and negative aspects of each analysis method and indicate improvements. Finally, I will consider the results of this study and compare them against the initial goals it set out to accomplish and suggest possible new ones.

5.1 The developments of outsourcing

The discourse analysis conducted in Section 4.2 revealed that outsourcing has come far from its early years in the automotive industry. Moving from buying goods to buying services, the lexeme evolves into a self-standing discourse, brushing close to globalization and changing work environment as the availability of service work has become global. As this happens, outsourcing affiliates with themes of unemployment and globalization, resulting in two pronounced Us versus Them oppositions: labour versus employer and domestic versus foreign.

What happens when outsourcing becomes mainstream? The old and familiar employer versus employee opposition transforms as work becomes
a global market item. This has led to redefining work as we know it. The frame of nation, when activated, creates a new, yet at the same time age old, Us versus Them opposition in discourses relating to work and outsourcing it abroad: domestic versus foreign.

In lexical development, the paradigm of the new workplace of uncertainty manifests in many ways – the norm of yesterday, the payrolled, regular employee, has become an ‘in-house employee,’ the new topological expression emphasizing the no-longer self-evident position within the company. This development is similar to a lexical peculiarity marked by Sweetser, albeit in a different context: an overexplaining bread machine flour package description stating that the flour contained is equally suitable for ‘manual bread’ (in Turner 2001, 149).

From the viewpoint of power, the redefinition of work through outsourcing serves a re-centering purpose, forcing agents and participants in the frame of business to adapt to the new surroundings. Introducing outsourcing as a “new dimension in workforce” does give employers the additional leverage and an upper hand in negotiations when, for example, discussing compensation and benefits. We think in containers and their boundaries, and the company boundary has traditionally been a limit for company responsibilities as well. Outsourcing provides a way to rethink this relationship in a way that benefits corporations as labour laws, regulations and agreements struggle to follow.

Meanwhile, in the United States, the articles explored indicate life has become business on both national and personal levels. Novel metaphorical usage of outsourcing allows government to transfer responsibility to the business sector, thus benefiting from legal loopholes and evading the core of democracy. As a lexeme close to the frame of business, outsourcing, when moved to the frame of the nation, brings the associations, actions, agents and processes of business to governmental work. This blend, as seen in the material gathered during discourse analysis of The New York Times, has its downsides – outsourcing has come to fields of war and even torture, allowing, as a practice, to circumvent national laws and international agreements.

In retranslating outsourcing to new readers, the journalists open up new venues for metaphorical outsourcing to travel on. The personal level also trickles through to the articles, although the scope in which it was studied here remained unfortunately small. According to the articles outsourcing is ordering out: besides politics, also prayers, childcare, new year’s resolutions
and even thinking can now be outsourced. Besides governmental life, outsourcing comes to religion, education and home as well, blending the frame of business with these themes in ways that make them more commercial. The questionnaire section of this study corroborated the themes of unemployment, business, and globalization found during discourse analysis. One difference with the two result-sets remained: the questionnaire respondents did not associate outsourcing with war and U.S. government corruption, which was the last, extremely prevalent theme starting from 2004 in the newspaper texts analyzed. On the one hand this may be due to the fact that the questionnaire data was collected in late spring 2006, and the discourse may not have yet reached the respondents. On the other, it may be that the respondents, living mostly in Finland, were not familiar with the immediate internal events of a country that is not their place of residence, and felt other effects of outsourcing more strongly and associated with them.

The Finnishness of most respondents may be seen as a weakness of the questionnaire sample. Yet, it may also be a boon: the associations of the informants correlated closely with themes of unemployment, business and globalization found during discourse analysis. This may suggest something extra about outsourcing: the strongest associations it evokes are, while not certainly universal, at least prevalent in the Western countries that act as source containers for the activity. This brings us to the other side of outsourcing, for it is certain that the receiving end of the activity may not share similar sentiments. The polarization brought forth by the SPG schema acts as a strong influence in this. Cognitively, outsourcing has been a redefinition of the places agents engaged in business are situated in. We will look into this next.

5.2 Outsourcing and its cognitive basis

The cognitive core of outsourcing lies in its topology and orientationality. Its main referent lies outside the actual lexeme: the companies involved in the process of outsourcing and the frame of business, along with the agents, participants and processes that follow along it. Outsourcing utilizes the topological container status of companies as containers, the topological out-prefix directly referring to this aspect.

When modeling outsourcing in Section 4.1 using a technique adapted from
ECG, we saw a Source-Path-Goal-schema, on which work, compensation and employees travel from one container to another (Figure 4.1). When moving to the frame of the nation, the containers grow – *outsourcing* becomes the path on which work travels abroad, as, besides companies, also countries are containers (Figure 4.2). At the same time, this transition creates a nationalist Us versus Them tension. It may be argued that this tension builds on our cognitive tendency to categorize, and thus separate, entities to make them comprehensible and interactive agents, although this aspect will need further study.

*Outsourcing* is also interesting as a shaper of corporations, extending the company is a container metaphor. The metaphorical corporation has been studied within business communication, but the focus has been mainly on the transformative aspects of active construal of organizations through structural metaphors (see for example Morgan 1997). This study on *outsourcing* shows that there is more to be considered when charting the use of cognitive metaphors in and around organizations than the traditional structural metaphor, which has been the focus of metaphor research in business communication.

**Neologisms**

Besides blending business with nation and making use of their topological faculties as containers, *outsourcing* has been a prolific root for new lexemes. In coining new meaning, the topology of *outsourcing* is manifested clearly – neologisms spread directionally, and *outsourcing* is followed by *insourcing*, *upsourcing*, *downsourcing* and even *rightsourcing*, among others. This spread is far from arbitrary, instead indicating that either its topology, syntax, or both invite these new lexemes.

Most of these neologisms stem from the prefix out (such as *insourcing*, *upsourcing*, *downsourcing*), while a few refer to sourcing (crowdsourcing). The most interesting cognitive fact on this spread is that the coining of new meaning from *outsourcing* seems to first follow topological, then orientational aspects of *outsourcing*. This directionality relates to the topological aspects of the companies that outsource, companies as containers. Some of the new lexemes coined after *outsourcing* are illustrated in Figure 5.1, which takes the
Figure 5.1: Outsourcing has sprouted new neologisms including but not limited to insourcing, upsourcing, downsourcing, leftsourcing, rightsourcing and even intersourcing.

corporation, involved as the source container of the outsourcing activity, as the starting point for the action.

Some of these directions are orientational and their metaphoricity springs from that. To take an example: rightsourcing is orientational in that it refers to our bodily orientations, division to left and right side and left- and right-handedness. Where right-handedness is prevalent, and the right hand is the hand with which objects are most often manipulated and moved, this orientation metaphorically comes to refer to importance, as in:

*She was his right hand.*

and righteousness, as in:

*You did the right thing.*

Prefixes such as left, as in the few instances of leftsourcing or wrongsourcing found on the internet, are used in an ironic or critical tone, either mocking the practice of outsourcing or suggesting alternatives. This orientational irony, which seems related to image schemas, yet at the same time is culture-bound, undoubtedly does not limit to outsourcing.
It is debatable, however, that this array of novelties such as *insourcing* and *rightsourcing* would be similar from language to language, which creates additional constraints when translating business language from English, the *lingua franca* of business, to other languages. The spread of these neologisms should be investigated further, as they seem intricately patterned in a way that supports the image schema theory presented in Chapter 2.1, and furthermore binds with the plus-minus parameter discussed within that theory for example by Krzeszowski (1993) and Hampe (2005).

### 5.3 Combining methods and theories: what worked?

This study was conducted using a mixed methods approach. During the research process, the positive sides of this structure stood out. There were also some unexpected changes and findings, as the directionality of the neologisms conceivably derived from *outsourcing*. Looking back at the process, the cognitive-linguistic analysis mixed with a historical and intertextual approach to discourse analysis emerged as main analysis methods, supported by the questionnaire study and corpus analysis findings. The strength of the cognitive approach was not anticipated at the very beginning, but it proved extremely beneficial.

Planning the study using the mixed-methods approach was integral in weighing different approaches. Joining the cognitive aspect to the analysis certainly helped deepen the interpretation, as the image-schematic containers provided cognitive contextualization sketching out possible reasons why ideological oppositions form. Metaphorical language emerged as a vital tool for retranslating *outsourcing* to new audiences. Without this link, the intertextual analysis would have been lesser. Thus, combining the cognitive to the discourse-analytic proved useful.

The mixed-methods approach may also be of assistance on a greater scale – it answers a need for formulating an approach that produces consistent data that is more researcher-independent than the discourse-analytical method used alone. If the framework used here was to be improved and standardized, it could possibly help researchers utilizing discourse analysis as their main method to compare results obtained from different fields and relate and
collate them to one another more reliably than in the past. Keeping this in mind, I have aimed at transparency in doing this research, and hope this results in good reproducibility.

**What could be done better?**

There is always room for improvement. For this study, I wanted to test out several approaches to see which ones would combine best. During this process, I learned that besides formulation, the sequence of execution is important.

Although the questionnaire provided valuable confirmation for the discourse-analytical findings, formulating it later, after discourse analysis was complete, would perhaps have helped to focus the questions slightly differently, thus providing more ample material for interpretation. Corpus analysis, although it served the purposes of this study in indicating the company *outsourcing* liked to keep in *The New York Times*, was otherwise left a stump, with no analyzed concordances. This is also a point of improvement. In addition to this weakness in the corpus section of this study, the sample may also have problems with representativeness.

This problem relates to the most serious caveat in utilizing WebCorp as the sole means for diachronic corpus analysis: it faces problems with the semantic web – or, to put it more precisely, the non-semantic web. The metadata conventions, which, for example, state when each page was last updated and by whom, vary widely on the internet and are thus unreliable. To give an example, a timestamp on a *NY Times* web page does not necessarily coincide with the date an article was posted there, nor is all material retrieved necessarily from that date. Other problems, such as unwanted data (such as web page masthead and other, article-external data on the page accessed), which originally did not co-occur with the paper edition of the article, exist. WebCorp, as the web itself, is in a state of constant change and development, and these problems will hopefully diminish as the tool is refined. At the moment, the articles collected on *outsourcing* should be tagged and entered into a corpus for the sample to be a truly representative sample of denotative occurrences of *outsourcing* in the *NY Times*.

As noted in Section 2.3, the theoretical joining of cognitive linguistics and CDA does require additional work, although there already are some
reflections on cognition and ideology (see for example Dirven, Hawkins & Sandikcioglu 2001).

Besides method- and theory-specific problems some universals also hold. The first and foremost of them has been limiting the depth of this particular study and my own ambitions – I cannot analyze every single sentence of every single article in the collection, nor can I look up other sources besides the *NY Times* and the questionnaire study answers, which could also prove interesting and yield yet another viewpoint. The cognitive sideway, as already mentioned above, is also alluring and holds many promises for future research.

### 5.4 All together now

Although, as noted in Section 2.3, the theoretical aspects of cognitive linguistics and CDA remain to be reviewed and reconciled, the pragmatic part of combining intertextual analysis with cognitive-semantic depiction of *outsourcing* seems to work, providing rich information on the background of group-formational aspects of news texts, thus helping us to understand deeply entrenched ideological positions such as nationalism. The mixed-methods approach provided solid frames for carrying out this study, and may thus be recommended as a good, general helper in research formulation.

Combining cognitive linguistics with discourse analysis provided a wealth of information on *outsourcing*, which has become a discourse in its own right. As a lexeme, it has travelled a long way in *The New York Times*: from its origins in the automotive business in the early 1980s, it has entered the domains of general business language, globalization speeded by the IT revolution, the discourse of job market change and the discourse of U.S. politics, war and the methods used for waging it.

Headline analysis shows *outsourcing* is used as a stand-in Agent, a process to background the actual participants in the story. As a phenomenon, outsourcing is naturalized to such an extent that it is explained through metonymies and metaphors of biology and nature in headline language: *OUTSOURCING IS MIGRATING JOBS OR OUTSOURCING IS WHEN JOBS FLEE*. In this study, these metaphorical depictions were found to connect with changing productional aspects and audiences the discourse on *outsourcing* has been
exposed to: journalists retranslate and represent *outsourcing* when new readership is expected, which most often is when the lexeme changes its productional or receptional context. This retranslation is often highly metaphorical in nature and thus creates new connotations.

As the semantic field of *outsourcing* has spread to mean a widely known phenomenon, the word itself has gained negative associations: it connects with unemployment, globalization and war, as seen in discourse analysis, questionnaire study data and corpus material. Semantic change of the lexeme is realized through changes in the discursive practice between 1981 and 2007, through connecting it metaphorically and ideologically to phenomena and contexts the word was not originally associated with. Its usage as a participative, humanized and feeling Agent in headline language makes it responsible instead of the true Agents in the fields of business and politics. This stand-in role in headline language certainly does its share in mystifying and naturalizing *outsourcing* as a phenomenon.
6 Conclusion

We began with two aims: to combine cognitive-linguistic data mining to Critical Discourse Analysis using multiple methods to ensure reliability, and to chart out the developments of outsourcing with the formulated research framework. This is what we learned.

In outsourcing, the frame of business has blended with the frame of nation. As the lexeme has entered new domains of meaning, journalists retranslated and naturalized it: outsourcing became a situation when jobs flee, suggesting economy is a force of nature. The syntactic change in the use of outsourcing from the early 1990s most frequent usage as proper noun qualifier to a common noun denoting a phenomenon and from ideational to interpersonal has given leeway to dimensions of connotative meaning that make its semantic field more complex. One implication of this may be that outsourcing has recently featured less in the genre of neutral business news, such as reports on acquisitions and sales, the context it was most frequently used in only a decade ago. As the lexeme has been introduced to the discourses of war both in Afghanistan and in Iraq, not to forget U.S. government malpractices and alleged corruption, its attractiveness in reporting the business genre news it was once used for has decreased. Besides work, workers and compensation, it is now possible to outsource war and responsibility. We are left with a national business of war.

The most frequent theme of the questionnaire results is that outsourcing strongly associates with unemployment. The corpus analysis close collocate layoffs correlates with this finding, as do the results of the intertextual analysis performed in Section 4.2. Questionnaire results also show that outsourcing is negatively associated among fluent English speakers, most of them native speakers of Finnish. These results are most likely culture-bound. Would people living in the receiving end of the outsourcing activity feel the same way?

The scope of this study was wide and provided many implications for
further research as many interesting developments were not explored in the scope they deserved. Besides entering the frame of nation, the frame of business seemed to pervade other areas of life, such as academia, health care, baby care, even thinking. A closer look at these processes and the metaphorical language used within them would undoubtedly be rewarding. The topological and orientational neologisms sprouting from outsourcing and their connections to companies as containers also warrant another, deeper look. Yet more questions seem to emerge. What about the Finnish translation of outsourcing, ‘ulkoistaminen’, will it, too, develop neologisms topologically and orientationally? Isn’t the topological opposite sisäistäminen, ‘internalizing’, taken already? I hope to answer these questions and fill in the other gaps indicated in Chapter 5 another time.

Despite all the problems discussed in the previous section, this study has been an interesting learning experience into pragmatic, real-life linguistics. We have also seen that cognitive linguistics adds scope to CDA, and the methods utilized work well together and complement each other, improving reliability in a way that can and should be developed further into a research framework.

It seems outsourcing has dirtied in use. Replacements are already on their way, however, should outsourcing fall out of fashion: new upstart words such as insourcing and upsourcing, not to forget rightsourcing and crowdsourcing, continue where outsourcing left, with promises to be better than outsourcing ever was. They spread mostly topologically and orientationally in a way that warrants further study. At the same time, outsourcing has widened its meaning in a way which makes it possible for us to consider outsourcing our brain to Wikipedia. The NY Times columnist Thomas L. Friedman suggests in his May 19th 2006 column that “Outsourcing, Schmoutsourcing! Out Is Over.” Not necessarily so, since the topological possibilities of outsourcing out of the conventional context may prove simply too alluring. What if out is not over? What if it is more in than ever?
Works cited

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  URL: http://news.bbc.co.uk


URL: [http://wordnet.princeton.edu/](http://wordnet.princeton.edu/)


Osgood, C., Suci, G. & Tannenbaum, P. (1957), *The measurement of meaning*, University of Illinois Press.


**URL:** [http://webcorp.org.uk](http://webcorp.org.uk)


**URL:** [http://lists.oulu.fi/mailman/listinfo/translat/](http://lists.oulu.fi/mailman/listinfo/translat/)


**URL**: http://ok.helsinki.fi/index.php?page=81&language=1


**URL**: http://en.wikipedia.org/wiki/Crowdsourcing/


Works consulted


Appendix A: Questionnaire forms
Questionnaire

Please fill in the data below. The fields marked with an asterisk (*) are obligatory.

Your age: (*)

- 13-19
- 20-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70+

Your native language: (*)

- I am a native English speaker
- I am non-native English speaker

My native language is:
(non-obligatory, define if not English)

Your language variant:
(If non-native, estimate the closest match)

The variant of English I use is best described as: (*)

If you answered 'other' or wish to be more specific, give extra information here:

The following pages present you with some words. You are asked to rate them on a scale ranging from 1 to 5. The scale is as follows:

1. I think this word sounds "extremely negative"
2. I think this word sounds "somewhat negative"
3. I think this word is "not negative or positive"
4. I think this word sounds "somewhat positive"
5. I think this word sounds "extremely positive"

When you are finished evaluating a word, press the gray button to proceed to the next one.
Proceed by pressing the button below.
productivity
1. 2. 3. 4. 5.

value-added
1. 2. 3. 4. 5.

outsourcing
1. 2. 3. 4. 5.
cost-effective
1. 2. 3. 4. 5.

Questionnaire - second part
--------------------------------------------------
You have completed the first part of the questionnaire. Now for the second part.
Please write down the first word that comes to your mind after reading the word presented to you. Proceed to the next word by pressing the grey button.

--------------------------------------------------

Proceed by pressing the button below.

productivity
value-added

outsourcing

cost-effective
You have completed the questionnaire and your results have been saved. All the information you submitted will be used for research purposes only.

If you have any comments, questions or suggestions, please send them to me through the form below or by contacting me by e-mail (firstname.lastname@helsinki.fi). If not, just close the browser window.

Send

Thank you for your time!

Susanna Neiglick

-----------------------------------------
Appendix B: Headlines with *outsourcing*
Appendix C: Statistical questionnaire data
### Correlations

<table>
<thead>
<tr>
<th></th>
<th>Recoded Part I answers</th>
<th>Neutrality of Part II associations</th>
<th>Outsourcing Part I (closed)</th>
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<td>Sig. (2-tailed)</td>
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<td>.889**</td>
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**. Correlation is significant at the 0.01 level (2-tailed).

### Nonparametric Correlations

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<tr>
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<td>Correlation Coefficient</td>
<td>Sig. (2-tailed)</td>
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<tr>
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**. Correlation is significant at the 0.01 level (2-tailed).