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GUEST EDITORIAL

EMOTION AND LEARNING IN THE WORKPLACE: CRITICAL PERSPECTIVES

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Emotion, learning and the workplace: a complex nexus

The articles in this special issue bring together three words: 'emotion', 'learning' and the 'workplace'. Let’s start with the last one. When we sent out the call for papers, we wrote that we interpreted workplace very broadly – it might be located in quite different occupational sites of paid employment, in voluntary or other types of less formal work, or in the domestic sphere. Whatever particular view authors and readers might have of the workplace, we conceive of it as a space-time, a context, and/or a set of practices where people engage in productive or reproductive work. A fundamental assumption we make is that learning processes - formal and informal, designed or not designed - happen in workplaces on a daily basis.

The second word is emotion. Since the last two decades of the twentieth century, the study of emotion in the workplace and more broadly in organizations has emerged as a key topic in academic literature. Special issues appeared in international journals devoted to the burgeoning theme of emotion in organizational life (e.g. Work and Occupations (27/1), Human Resource Management Review (12/2) and Human Relations (60/3)). A new journal, the International Journal of Work Organisation and Emotion, appeared in 2005. We have also seen the publication of edited volumes contributing to the constitution of this field. Here it is relevant to point to the classic books edited by Fineman (1993; 2000; 2008); the text by Askanasy et al. (2000); the work of Payne and Cooper (2004); and the most recent book edited by Sieben and Wettergren (2010). We discuss the key directions in this literature below. Notwithstanding this boom, however, rarely have learning and emotions in the workplace been investigated together in a special issue of a journal (see Management Learning 28/1 for a notable instance).

The third and final word, then, is learning. There is, of course, a massive theoretical and empirical literature on this topic, which it would be impossible to review within the remit of this editorial; and readers will be introduced by authors of the papers collected here to the particular theories which inspired them. However, as Colley et al. (2003) conclude in their wide-ranging theoretical review, a ubiquitous but unhelpful tendency in the literature has been to treat informal (or non-formal) learning as fundamentally distinct from formal learning. Instead, they argue, it is important for researchers first to recognise that learning in most contexts has attributes of both formality and informality; second, to identify these and the interrelationships between them in any given situation; and third, to analyse the implications of this complex for that context. We believe that this understanding is especially relevant for the study of emotion in relation to workplace learning: a focus on emotion, itself so often rendered invisible, draws our attention to both formal and informal attributes of learning, as all of the papers in this special issue amply demonstrate.

It is, however, worth noting explicitly here the difficulties we met in collecting papers that were able to address all three concepts together - emotion, learning, and the workplace - for this special
issue. We interpret this difficulty as a signal of the originality and potentiality of such research. Why did we believe it necessary to dedicate a special issue to emotion and learning in the workplace? Why come back to synthesise these themes? Was it necessary to spend the time and ‘ink’ of the authors, referees and ourselves, as guest editors, to contribute further knowledge to these literatures? Today, after the work we have done and the time we have spent, we think there are two reasons that justify the efforts of us all. First of all, because literature on emotion and learning in the workplace very often slides towards the labels – at the same time appealing and dangerous – of ‘organizational learning’ or of ‘emotional intelligence’. These approaches tend to address learning and emotion in an economically instrumental way, based on human capital theory, and assuming a harmony of interests between workers and employers.

Closely related to this is the second reason: much of that literature fails to account sufficiently for the socio-cultural and socio-political context characterised today by the crisis of neo-liberal capitalism. The neoliberal belief system focuses on the individual as consumer in deregulated markets, including the labour market: this, it holds, is ‘the driving force of human progress’ (Hanieh, 2006, p.174). But the deepening global crisis of capitalism reveals that this system has reached its limits in a crisis of over-accumulation (Harvey, 2006). In its desperate search for ways to continue to accumulate capital, capitalists must seek to intensify their exploitation of labour. One of the means to do this is to draw into the labour process ever more of workers’ own personhood (Rikowski, 2002), and in particular their emotions (Colley, 2003), in a uniquely synthesised way: as expanded labour power, as a means of production, as a raw material of production, and as a commodified product. In short, we see in this tendency how the dialectical contradiction between the social relations of production and the social forces of production is historically expressed not as antagonism, but as the mutual transformation of one into the other (Allman, 2010). These specific concerns underpin the originality and significance of the papers presented here, and positions the special issue as one of ‘critical perspectives’ on the emotion-learning-workplace nexus.

The rest of this introduction is divided into three parts. In the first, emotionalizing learning, we underline the importance of conceiving emotions as intertwined in the learning process; this is an assumption which constitutes the background to all the papers. In the second section, learning emotions in the workplace, we focus on the idea that emotion can be an object of learning; here we also look at emotions from a constructivist perspective, and assume that they have to be interpreted in relation to the social, economic, political and cultural context. Finally in the third part we present some methodological reflections and introduce the four papers.

**Emotionalizing learning**

We would like to start these reflections with the classical Biblical story of Adam and Eve, which is itself a story about the intertwining of emotion and learning. Adam and Eve have power over all the creatures of the world, and the privilege of living in Paradise, but they have to respect the deal with their Creator: they must not eat the fruits of the tree of knowledge. Eve, however, eats the fruit and offers it to Adam, and in consequence they are expelled from Paradise. Within this act of gathering (and then in this grasping, taking, learning and knowing) lies a complex and implicit emotional texture. Eve’s stealing of the apple and offering it to Adam is passionate behaviour. What desire pushes Eve to eat and then to offer the fruit to Adam? What avid seeking after knowledge forces Eve and then Adam to not respect their pact? And again, what pleasure do they take from the sweet fruit? Which anxiety mixed with curiosity and envy shape and colour their emotions? Which strange excitement shapes their thought? These questions give voice to the intertwining of learning and emotion. At the same time, the story also reveals a dominant and deep-running discourse of disdain with regard to emotion. Emotionality is associated with the feminine Other; Eve is

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portrayed as weak in her inability to resist temptation; and her emotions are presented as a corrupting influence on Adam's masculinity and the rationality demanded by the pact.

Here too, we have to start with the observation that emotions are often ignored or at best marginalised in research on learning in the workplace. This happens both in the literature on organizational learning or learning organizations1 and on formal and informal learning (Marsick, 2009), including the widely used concept of situated learning and communities of practice (Lave and Wenger, 1990; Wenger, 1998). Despite Lave and Wenger’s concern with learning as a process of social participation, identity formation and belonging, their framework still follows the path of de-emotionalizing learning. If we consider some of the most celebrated models of learning in adult education, we realize that they also conceive the process of construction and acquisition of knowledge as separated from emotive processes. For example, both Kolb and Mezirow, two classic authors in adult learning, respectively emphasised the processes of reflection (Kolb, 1984) or of interpretation (Mezirow, 1991) in ways that essentially reduce learning to cognitive processes. For example, Kolb’s ‘learning circle’, his framework of learning in sequential phases (experience, reflection, theorization and design of a new action), fragments learning ‘into pieces’, and in turn also creates the illusion that it is under our strong, rational control (Fineman, 1997; Cunliff, 2002).

This literature, like the story of Adam and Eve, enacts a split between learning and emotion that mirrors a more important and widespread separation typical of western culture (Putnam and Mumby, 1993); we are referring here to the split between mind and body, culture and nature, female and male, pathos and logos, affect and knowledge and in conclusion also between emotion and learning. A long academic tradition has reproduced the Cartesian division between mind and body and nourished the idea of a teacher – and learner – endowed with only spirit and mind (Swan, 2005). Academic work, and we like to extend this idea to other kinds of jobs, are treated as mindful and bodyless, as the visceral, the sensual and the aesthetic – the pathos – are interpreted as sources of interference that must be regulated, controlled or suppressed.

In opposition to this separation we can identify two different, but in some ways connected traditions, that try to reconcile the Cartesian dichotomy (Antonacopoulou and Gabriel, 2001; Benozzo, 2011). The first tradition is represented by those authors interested in the fascinating idea of fusion between affect and cognition (Forgas, 2000, p. 403). We conceive emotion and learning as two social processes that are inextricably intertwined and interdependent. It is something that can happen at different levels of awareness and at different moments of existence: when we are concentrating on reading or listening, or again when we are interpreting something or someone. We can be more or less conscious of this fusion, but emotions always colour learning. Emotions sometimes constitute a background note to our thoughts, and sometimes they are in the foreground. Sometime these notes are more intense and other times they are silent or dissonant voices, but always “thoughts are imbued with emotions and emotions with thoughts” (Fineman, 1997, p. 16). And in this tangle, we realize that we feel emotions about our thoughts and thoughts about our emotions; we can feel satisfied with being angry or be pleased with the hate that we feel for another person; or we can blame ourselves for the desire that we feel for a person other than our usual partner. In other words, learning is an interpretative process that allows us to define and give meaning to reality and our life; this process is both emotional and cognitive, and to underline this connection Fineman states: “Maybe we should adopt a new terminology, such as cogmotion - to suggest that what is learned and not learned [...] cannot be appreciated outside a socially contextualized, socially constructed, discourse of emotion” (1997, p. 16). This position is different from the one recently expressed by Simpson and Marshal (2010), who have conceived learning and emotion as two processes which are mutually influential, but which are in a certain way always

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1 It is not the aim of our aim to propose a review of this literature; for a synthesis of the huge amount of works on this subject see DeFillippi and Ornstein (2003) and Elkjaer (2003).
The importance of connecting power and emotion is the last characteristic that we would like to underline. Critical feminist pedagogy conceives emotion (Bowler, 1999) as a culturally situated discursive practice that shapes, conditions, preserves and sustains power relations in which the white man is dominant and women and people of colour are subordinate. Power relations are inherent in 'emotion talk', and they shape the emotional display we are allowed to feel or what it is forbidden to feel. If we take this position seriously into account and widen the analysis to a macro-social level, then emotional discourses preserve and justify patriarchal and capitalistic society. But exactly there, where we recognized the political view of emotional life, we can also recall that emotions are also places of social resistance, because different kinds of 'emotion talk' can become resistant or disrupting counter-discourses (Brook, 2009).

Learning emotions

We have begun by underlining the inseparable connection between learning and emotion. We now continue by presenting another key idea that sustained the development of this special issue, namely that emotions themselves are learned. This notion is perhaps most famously represented by Arley Russell Hochschild’s (1979; 1983) classic works on emotional labour. In her seminal investigation of flight attendants’ training and work, *The Managed Heart* (1983), she argues that human beings continually control emotions and shape them in relation to their contexts. Emotions, far from being something out of control – as they are viewed in the psychodynamic approach (Salzberger-Wittenberg et al., 1983) – are instead cultural phenomena. They are learned patterns associated with bodily reactions (also learned) that acquire different meanings in relation to the context, the situations and discursive interactions between actors. Emotional labour and emotion work are two fundamental concepts that are used and developed with different nuances throughout the special issue. Hochschild defines emotional labour in this way:

The flight attendant does physical labor when she pushes heavy meal carts through the aisles, and she does mental work when she prepares for and actually organizes emergency landings and evacuations. But in the course of doing this physical and mental labor, she is also doing something more,
something I define as *emotional labor*. This labor requires one to induce or suppress feeling in order to sustain the outward countenance that produces the proper state of mind in others – in this case, the sense of being cared for in a convivial and safe place. (1983, pp. 6-7)

In her theorisation, Hochschild distinguishes ‘emotional labour’ from ‘emotion work’. The latter is referred to as the management and control of feeling to create a public façade acceptable in broader social contexts, such as within the family or with friends. This emotion work, she argues, simply has a use-value, and does not entail exploitation. Emotional labour, on the other hand, is the control of our emotional life within the workplace in order to create exchange-values. This means emotional labour concerns those emotions that we have to manage and display in order to gain a salary, and which are exploited by the employer in the interests of profit. This distinction, however, cannot always be maintained. For some authors it is difficult (if not impossible) to separate emotion work from emotional labour, and they prefer to use emotion work as a comprehensive expression (Mirchandani, 2003). But all of this literature highlights the way in which workplaces constrain us to perform the challenging and often exhausting work of outward emotion display: channelling our emotions; defining which feelings we are allowed or required to display; and dictating those we must suppress. Our living depends on the presentation of ‘correct’ feelings: hospital doctors have to show seriousness, nurses care, psychotherapists empathy, students deference and respect, teachers interest and pastoral concern, and gravediggers goodwill and composure.

The work of Hochschild, along with that of Agnes Heller (1979), marked a critical turn in studies of emotion at about the time that neo-liberalism, under the Reagan-Thatcher leaderships, was beginning to take hold. Heller was the first to argue, in a broader critical examination of emotion in society, that dominant social groups construct particular sensibilities according to their own cultural norms; they then claim that they are innate, natural and irresistible. But:

...emotions are *neither* natural/innate, *nor* undifferentiated resources to which different genders or social classes have differential access and affordances. However universal, inevitable and irresistible they appear to us, in fact quite different repertoires of feeling are available to different class fractions and genders within them. They are related to the mode of production in any given society, to multiple divisions of labour within it, and to different relationships to the means of production. (Colley, 2006, p.25, citing Heller, 1979)

In the last twenty years research and theory have continued to develop these themes, and we can distinguish two intertwined developments relevant to this special issue. The first is related to those authors who have been working on the idea of *emotional culture* (Martin, 2005; Martin et al., 2008), conceived as a cluster of norms and rules – conveyed through language and expressed through rites and rituals, stories, myths, symbols and artefacts – that are related to what workers *have to* feel, display, embody and suppress. Emotional expressions are a way of displaying the feelings learned through formal inputs (such as training courses or management education) and informal situations (such as the marketing of particular occupations, or social interactions in the course of the working day). During workplace socialization and throughout our careers, we continue to learn and reinforce the emotions that we have to perform in our job, so emotions become *part of our job*, and therefore part of what we sell to others. We are starting to look at learning contexts – referring here also to the workplace as a formal or informal environment for learning – as places where management educators and participants, teachers and students, leaders and managers, workers and collaborators learn to display some emotions (for example interest and enthusiasm) and at the same time learn to suppress others (such as boredom, shame and pleasure). As in a marriage or at a party or funeral, there are certain feeling rules; other, different rules operate within a workplace. The idea of emotional culture also goes together with other concepts such as...
gender or race, as Shan explores in her article. For example, according to dominant norms and gender stereotypes, women are allowed – even required – to express some emotions (such as care and empathy) different from those required of men (for example, aggressiveness or anger). According to racial and class stereotypes, however, the ways in which poor black women have to care for their children, often by working long hours in two jobs, are regarded as inferior to the way in which white, middle class women are able to care for their families by working full-time in the home (Thompson, 1998).

The second vein derives from those authors that have widened their view, as Heller did, to the historical, cultural, political and social context. They have developed ideas such as emotional regimes (Reddy, 2001 in Sieben and Wettergren, 2010) and emotionologies (Fineman, 2008). The first of these expresses the fact that we live in patterns of management and representation of emotions not only within organizations, but also within society as a whole. If it is true that these patterns produce and manage emotions, then as a consequence we should question the idea of emotions simply as authentic, private and individual. It also indicates that we should question notions such as ‘emotional intelligence’ (Goleman, 1996), which treats the management of emotion in the workplace unproblematically. In appearing to value emotions, but at the same time providing measures by which to control them in a way that increases productivity and profitability for employers, it may itself constitute an emotional regime (for detailed critiques, see Hughes, 2005) Emotional literacy can be interpreted as another such type of regime. In education or in management learning activities (and also in qualitative research), we are more and more invited to talk and write about emotion. Emotions thus become textualised through writing (and the reading and interpretation of those writings). We have to exercise extreme caution toward this form of emotional literacy, however, since it risks becoming a new form of regulatory discourse that disciplines the expression of emotions precisely when we try to give voice to them (Burman, 2006; 2009).

Alongside the notion of ‘emotional regimes’, Fineman’s definition of emotionologies draws attention, as did Heller (1979), to the broader social construction of feelings:

The social valuation produces an emotionology – society’s ‘take’ on the way certain emotions are to be directed and expressed. In sum, while emotions have biological roots, they are soon overwritten by social and moral discourses; we are born into a world where emotionologies take a grip on our experiences and behaviors. (2008, p. 2).

Emotionologies are produced and reproduced – and, we emphasise, learned – through radio, newspaper, film, TV series and soap operas, schools, religions, celebrities, the internet and governments. All these sources contribute to construct the ‘appropriate’ emotions that we have to feel in some social contexts or towards specific groups or minorities in order to respond ‘appropriately’, in the right place, in the right way, at the right time. That is why many people are sceptical towards politicians, disgusted by drug users, disconcerted by the poor and fascinated by celebrities. This notion of emotionologies is connected with the concept of discourse. Moral, political and religious discourses contain ideologies which influence emotions so that we are obliged to feel some emotions towards specific groups such as immigrants, homosexuals or disabled people. As we feel in a certain way, so we also legitimize our own existence.

Such, then, are some of the critical approaches to understanding the learning of emotions, not only in the workplace, but also from a broader social perspective. We turn now to introduce the four papers in this special issue.
Researching emotion and learning in the workplace

In the call for papers we asked for empirical work based on qualitative methods that could have been inspired by such different approaches as constructivist, psychoanalytical, post-structural, and critical stances. Since the beginning of this project we have been convinced that, in order to investigate emotion and learning in the workplace, it would be necessary to take an interpretative approach. This is another characteristic that positions the special issue. If we adhere to a constructionist perspective on emotions, it is qualitative research that allows us to reconstruct the complex emotional textures that permeate organizational life. Such inquiry should be interested in issues of power, politics, gender, ethnicity, control and exploitation, and promote social justice through its findings. We agree with Torrance (2010) that:

...politics and science are not separable – the one is implicated in the other, and vice-versa. Many in the scientific community recognize this themselves and similarly raise questions about what research is for, in whose interests it is undertaken, and how knowledge is produced in practice (p. xviii).

To understand, to know and to grasp the fragile emotional texture of workplace life is to be interested in tales, narratives, stories, interview and case studies. Our focus is on interviews and diaries, gesture and body expressions, texts and images, discourses and interactions. At the same time we are not so naïve as to think that those textures that we observe represent the ‘authentic’ emotions felt by the actors in a learning scene. Critical psychology (Parker, 2005) shows us that those labels that we call emotions can hide (and reinforce) power relations. And who has the power to define and assign an emotion? What interests does s/he represent? All this makes the picture more complex and signifies that researching emotion is a far from straightforward task.

The four papers in the special issue cover a range of geographical and cultural contexts: outsourced work in India, public service work in the UK, Chinese immigrants in Canada, and a global education business developing language-learning software. All of them discuss emotion and learning in paid workplaces, but of very different kinds: from youth support and on-line tutoring, to call centres and engineering firms. The first two occupations entail social reproduction through educational and social services, and the latter two represent more traditional understandings of ‘productive’ work (that is to say, work that produces commodities invested with human labour power, and thereby creates surplus value, or profit). However, socially reproductive work can be understood as being productive at the same time, not only because it is increasingly commodified and/or privatised under neo-liberal regimes; but also because the labour power it reproduces is itself a commodity for the labour market, that special class of commodities which constitutes the very source of surplus value (Fortunati, 1995; Rikowski, 2000, 2002). The point we emphasise here is that, regardless of the current global drive to cut public spending on human services, the work of social reproduction remains no less important for capitalism than other forms of productive work, since it provides the life-blood for the creation of profit.

In the first paper, Helen Colley focuses our attention directly on the implications of the current global economic crisis for workplace learning, in the specific context of austerity measures imposed on the UK public service sector. She challenges us to think about ‘not learning’ in the workplace, and how austerity may be intensifying obstacles to learning. Drawing on research in a service supporting young people in school-to-work transition, her study highlights a series of contradictions: a rhetoric of service conflicts with an increasing scarcity of resources; personal and professional values conflict with economic value; and emotional commitment to client care is thwarted by targets focused on rapid welfare-to-work outcomes. It is a sobering account, but one that raises deeply significant questions about ‘ethics work’ – the day to day labour of practising ethically, and the increasing devolvement to individual practitioners of ethical decision-making.

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about crucial issues such as client access to the service. Drawing innovatively on Bourdieu’s concept of *illusio*, Colley’s paper argues that such ethics work calls for learning; but that circumstances of austerity make learning extremely difficult, disrupt practitioners’ sense of commitment, lead to emotional suffering, and diminish professional capacity as experienced workers are forced to quit the service.

The following two papers look at emotion and learning in the workplace through the lens of race and ethnicity, an under-researched aspect of this field, as well as class and gender. In the second paper, Kiran Mirchandani proposes a critical view of the training activities of Indian call centre workers. Such call centres have arisen through the outsourcing of services by big companies in Europe or America to countries where the workforce is cheaper to employ. The neo-liberal agenda which drives this outsourcing also plays its part within the workplace, demanding the formation of an entrepreneurial self on the part of employees. During their training courses, Indian call centre workers have to learn several skill sets including, crucially, communication skills. Among the skills taught to and required of workers, some are explicitly connected to showing care, deference and respect towards clients, whatever emotions those clients may express. In this case, emotion work is embedded within the training programmes, and is infused with element of racism and neo-colonialism. Together with traditional communication skills, these workers also learn to be subjected to the racialised harassment and abuse meted out by clients located in other parts of the world. Mirchandani’s powerful analysis reveals that this goes beyond simply ‘surface acting’ (in Hochschild’s terms), to constitute more deeply the ways in which employees define their own subjectivities as workers. The development of ‘soft skills’ thus demands ‘adjusting to inequality’ in ways that impair rather than enhance operators’ capacities; instead, she argues, human rights and anti-harrassment legislation should be extended to protect workers offering transnational services.

Hongxia Shan’s paper continues to explore interwoven issues of race, gender and class in relation to emotion and learning in the workplace. She discusses the experiences of immigrant Chinese engineers working in Canada, under pressure to learn to fit in with the competitive, male-dominated and individualistic workplace culture that pervades the engineering industry in the West. Here too, straightforward concepts of learning are challenged: dominant notions of acculturation assume that culture is objective and fixed, and that immigrants must learn the host culture and unlearn their own. More specifically, traditional Asian and Chinese cultures and behaviour are assumed to be too feminine, and there is pressure to adapt to the more macho ‘feeling rules’ of the engineering workplace in Canada. For Chinese engineers, this creates a strong sense of alienation within the workplace, and between work life and social life. Their learning has to be directed to ways of resisting or reconciling these tensions; and sometimes their tenacity in acting more compassionately and collegially is seen to improve conditions for their Canadian-born co-workers too. Emotion learning, Shan concludes, should therefore be seen as a process of negotiating power relations, which policy-makers and professional organisations need to take into account.

Sue Webb’s paper concludes the special issue. She presents the case of a global educational business company which develops software for language learning within other commercial enterprises, and uses ‘on-line tutors’ not to teach but to service learners’ relationship with the software. Webb argues that this is an example of digital Taylorism, where each moment of the learning process has been divided, fragmented, regulated and controlled. This poses fascinating questions – relevant to all distance-learning – about the nature of on-line tutoring and the extent of emotional labour within it, when teaching and learning are so strongly mediated by technology. Here, resonating with Colley’s paper, tensions are revealed between the company’s need to cut costs, and its emphasis on personalised service provision by its tutors, especially where tutors also played a management role as well. As in Shan’s study, we see a spectrum of responses to the demands of this emotional labour, and Webb analyses how these responses are inflected by
hierarchies based on social and cultural positioning as well as those within the company itself. She demonstrates how emotional labour, in the guise of ‘customisation’ and ‘personalised learning’, is marketed as part of the product on offer even as that product is industrialised through the use of technology. Crucially, she concludes that technology cannot entirely replace the role of a teacher: rather than erasing emotional labour in education, technology in fact reinforces the need for it to ensure student motivation, satisfaction and success, and thereby to guarantee the satisfaction of the client company buying in the service.

The complex nexus of emotion and learning in the workplace, then, is brought into close-up by the papers in this special issue, each author focusing on different contexts and aspects of their interrelationship. But much still remains unexplored. We live in a society which has become emotionalised, where speaking about emotion is allowed, and where it has even become fashionable to display emotion in public. Scholars need to challenge the direction of this vogue, and continue to ask critical questions about it: this is our task for the future.

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