

# TOWARD A TOOLKIT FOR EMOTIONALIZING INSTITUTIONAL THEORY

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## **TOWARD A TOOLKIT FOR EMOTIONALIZING INSTITUTIONAL THEORY**

### **Abstract**

As institutional theory increasingly looks to the micro-level for explanations of macro-level institutional processes, institutional scholars need to pay closer attention to the role of emotions in invigorating institutional processes. The author argues that attending to emotions is most likely to enrich institutional analysis, if scholars take inspiration from theories that conceptualize emotions as relational and inter-subjective, rather than intra-personal, because the former would be more compatible with institutional theory's relational roots. The author reviews such promising theories that include symbolic interactionism, psychoanalytic and psychodynamic perspectives, moral psychology and social movements. He concludes by outlining several possible research questions that might be inspired by attending to the role of emotions in institutional processes. He argues that such research can enrich the understanding of embedded agency, power and the use of theorization by institutional change agents, as well as introduce a hereto neglected affective facet into the study of institutional logics.

Emotions are an intrinsic part of human experience, and several emerging trends in institutional theory have finally brought emotions into the research focus. Paramount to this is an increasingly widespread recognition among institutional researchers that understanding micro-foundations and micro-processes is essential for a continued progress in understanding how institutional arrangements are created, maintained and disrupted (Lawrence, Suddaby, & Leca, 2011; Powell & Colyvas, 2008; Thornton, Ocasio, & Lounsbury, 2012). Thus, in examining reactions to institutional contradictions, emotions have been brought to the fore as possible triggers of change (Creed, Dejordy, & Lok, 2010; Gutierrez, Howard-Grenville, & Scully, 2010). Furthermore, researchers increasingly seek to understand how people experience various institutional arrangements (Suddaby, 2010) and negotiate their social reality on an ongoing basis (Hallett & Ventresca, 2006a, 2006b), and acknowledging the role of emotions in these processes becomes increasingly important.

But how to incorporate emotions into institutional research? Emotions and related constructs have been studied in fields as diverse as philosophy, psychology, sociology, economics, neuroscience, biology, and so on. In management and organization studies research on emotions has grown in prominence (Ashkanasy & Humphrey, 2011; Fineman, 2000, 2006; Gooty, Gavin, & Ashkanasy, 2009). But as a late arrival, organizational institutionalism is faced with a daunting task of figuring out where to look for inspiration for investigating emotions, given the vast selection of such sources (e.g., Lewis, Haviland-Jones, & Barrett, 2008). I argue that in order to derive the maximum explanatory benefit from such integration, institutional researchers should be mindful of epistemological compatibility between institutional theory and the potential sources of insights about emotions. The purpose of this essay is to outline some possible components of a toolkit for institutional scholars seeking to incorporate emotions into

their research by highlighting the relational nature of institutional theory that demands similarly relational approaches to emotions. I also to raise some points of caution in order to avoid some possible traps of combining incompatible theories that may result in epistemological incoherencies and an incompatible conceptualization of the human agent in institutional theory.

The remainder of this essay is structured as follows. I first briefly build my case for the needs to attend to emotions in institutional theory and offer some general guidelines for doing so. Next, I review several theories that seem to offer valuable insights about emotions that could benefit institutional analyses. I then provide an outline of possible research directions and suggest ways in which a greater attention to emotions can illuminate some age-old questions that have been important in institutional analyses.

## **LINKING EMOTIONS AND INSTITUTIONS**

### **Why Emotions and Institutions?**

There is an increasingly widespread recognition among institutional scholars that macro-level institutional processes cannot be understood fully without uncovering their micro-foundations (e.g., Lawrence et al., 2011; Powell & Colyvas, 2008; Thornton et al., 2012). Yet, examining the micro-practices and processes through which institutions are created, maintained, or disrupted by attending to the “actors” and their “work”, without unpacking how *people* become particular kinds of actors provides us with a truncated understanding of the institutional work performed. In order to understand why people perform some forms of institutional work and not others, we need to attend to how people experience the institutional milieu within which they operate (Suddaby, 2010), that itself shapes not only the resources that are available to them (Hwang & Colyvas, 2011), but also shapes and primes how they think and feel (Hallett, 2010; Weber & Glynn, 2006).

However, organizational institutionalism has been slow to recognize and incorporate emotions into the analyses of institutional processes, resulting in a peculiar discrepancy between research in organizational institutionalism and that in other areas of management and organization studies that increasingly place emotions and related construct front and center and organizational institutionalism. Whereas it is not very surprising to see the rise of research on emotions in organizational behavior (Gooty et al., 2009; Jordan, Ashkanasy, & Hartel, 2002) and leadership (Gabriel, 1997; Schein, 1992) that have historically maintained relatively close connections to psychology whose interest in emotions could be linked all the way back to Freud, it is interesting to see that even such areas as strategic management, with its traditional affinity to the field of economics, increasingly acknowledging that strategists are not entirely rational actors. For example, Chatterjee and Hambrick (2007) note the role of CEO narcissism in their tendencies to make bolder and riskier strategic moves. In another recent example Plambeck and Weber (2010) highlight the importance of CEOs' ambivalence in influencing their interpretations of and reactions to the firms' strategic environment. Elsewhere, in the burgeoning research area of strategy-as-practice, the importance of emotions is also recognized (Jarzabkowski & Paul Spee, 2009; Wooldridge, Schmid, & Floyd, 2008)

Although some institutional scholars like DiMaggio (1997) and Scott (2008) acknowledge the role of emotions in institutional processes, they parallel the similar tendency in social cognition research (e.g., Fiske & Taylor, 1991) to conceptualize emotions as bi-products of cognition (e.g., as affective reactions to stimuli or as distortions of perception). For example, Scott (2008) discusses several emotions that are evoked in actors and audiences in reaction to behaviors that either conform to or deviate from one (or more) of the institutional pillars. Whereas the pillars themselves are theorized in painstaking detail, emotions are relegated to

paragraph-long treatments of reactions to each of the pillars, and there is no subsequent discussion of emotions throughout the remainder of the book. Thus, they are acknowledged but not integrated into the theoretical framework, which retains the cognitive bias, customary to neo-institutionalism.

A few recent contributions have sought to integrate emotions into the analyses of institutional work (e.g., Creed et al., 2010; Green, 2004; Hallett, 2010; Voronov & Vince, 2012), but so far these scholars have only acknowledged the role of emotions as motivators of institutional work. I would argue, though, that emotions play a more expansive role in institutional work. For example, although emotions are often cast as the most private aspects of human experience, they are also institutionally conditioned, with institutions prescribing and proscribing particular kinds of emotions in response to particular kinds of occurrences (e.g., Rozin, Haidt, & McCauley, 2008). Furthermore, emotions operate not only within people but also interpersonally and extra-subjectively (Barbalet, 2001; Fields, Copp, & Kleinman, 2007), and tendencies to feel and exhibit certain emotions under particular circumstances are linked to important social distinctions, such as class (Barbalet, 1992; Reay, 2005), gender (Nixon, 2009; Reay, 2004), race (Froyum, 2010), and so on. In addition, the ability to manage and experience both private emotions and emotional displays in a manner valued by institutional referents endows some groups of people with more privileges than others, making some appear as “experts”, or their social performance as seeming more “authentic”, “genuine” (Alexander, 2004) or charismatic (Andreas, 2007). Other groups’ social performances are marginalized and devalued by virtue of their emotional experiences and displays (Fletcher, 1999; Fotaki, 2013; Lively, 2000; Pierce, 1995). This is just a brief foreshadowing of the possible directions that open up to institutional scholars, if we are to take emotions seriously in our research, and I will

address these in greater detail later in this chapter. At this point I would like to address the question of how (not) to approach the study of emotions and institutions conceptually.

### **The Need for a Relational Conceptualization of Emotions in Institutional Analysis**

Based on Berger and Luckmann's seminal statement that "institutionalization occurs whenever there is a typification of habitualized actions by types of actors" (1966, p. 54), it is fairly clear that institutions should be seen as relational (Smets & Jarzabkowski, 2013; Weber & Glynn, 2006). The institution of "management", for example, is only meaningful because it defines the managers in a particular way in relation to those who are managed. Thus, it makes certain actions meaningful while rendering others nonsensical. Based on this, I would argue that linking emotions to institutions requires a relational approach (Emirbayer, 1997), whereby emotions are conceived of as occurring within particular interactions and are both an outcome of and inherent to the process of negotiating and settling on an institutional order. This recognition is key to determining what might be appropriate (and inappropriate) ways to conceptualize the links between emotions and institutions.

I contend that integrating the analysis of emotions into institutional analysis requires at least some degree of sociological sensitivity that acknowledges mutual co-determination of emotions and institutions and that does not reify emotions to the purely intra-individual level of analysis. The social psychological tradition of research on emotions that places a great deal of emphasis on control can be credited with making fine distinctions between different types of emotions, emotions and related constructs, conditions that elicit emotions, and so on. However, I believe that such an approach is incompatible with the relational ontology of institutions. Both emotions and people – or individuals – are reified and extracted from their social context, because emotions are defined as properties of individuals, with the social context providing

elicitors for the emotions. There is an overarching belief among social psychologists (especially in the North American context) that laboratory experiments can reveal certain basic properties of emotions that would, theoretically, still hold regardless of the specific real world properties of these stimuli (c.f., Kemper, 1978). Thus, it becomes possible for researchers to believe that such topics as humiliation in the context of intractable conflict (e.g., Coleman, Goldman, & Kugler, 2009) can be studied in a laboratory by using scenarios.

Rather, I suggest that we heed Friedland and Alford's (1991, p. 244) reminder that "it is the content of institutional order that shapes the mechanisms by which organizations [or people] are able to conform or deviate from established patterns." Throughout their highly cited chapter these authors remind institutional scholars not to fall into the trap of privileging either the societal, organizational or individual levels of analysis. Emotions then should be seen as being located in the "transactional dynamics" (Emirbayer, 1997, p. 302) through which the institutional order is rendered meaningful. In the next section then I review a number of theories that I think are suitable for facilitating the study of emotions in the context of institutions precisely because they enable us to grasp how emotions are intrinsically linked to the negotiation of an institutional order.

### **POSSIBLE ELEMENTS OF A TOOL-KIT**

In this section I provide a brief overview of different strands of research on emotions that I suggest could be useful as parts of a toolkit for integrating the study of emotions into institutional analysis. It is certainly beyond the scope of this chapter to do justice to any one of these perspectives. Rather, I merely seek to highlight some features of each of the following perspectives that might enable institutional scholars to incorporate analyses of emotions into

institutional analysis without reifying emotions as purely intra-personal or individual phenomena.

### **Symbolic Interactionism**

From the symbolic interactionist perspective, “self and society are two sides of the same coin. Interactionists study the constraints of culture as well as how people use their agency to navigate those constraints. In studies of emotions, interactionists explore how individuals use their capacity for agency to bring their feelings in line with what is expected of them” (Fields et al., 2007, p. 156). As this quote illustrates, symbolic interactionists are keenly aware of and have wrestled with the agency-structure duality – as much as institutional scholars have. Further, the symbolic interactionist perspective on emotions is a relational one, making it quite compatible with institutional scholarship. It is also noteworthy that symbolic interactionism has already played important roles in institutional analyses. For example, some of Stephen Barley’s work (e.g., 1986) and the more recent work that it has inspired (e.g., Lok & De Rond, 2013) draws heavily on symbolic interactionist tradition. But symbolic interactionists’ attention to emotions has not been incorporated into institutional analyses yet (see Hallett, 2010 for an exception). Yet, there are some useful insights about emotions that could be readily applied in institutional analyses.

The most general insight offered by symbolic interactionists pertains to how both local and broader societal norms constrain and shape people’s emotional experiences. A key preoccupation of interactionist scholars is with the various rules that guide the experience and displays of emotions (Hochschild, 1979, 1983). Thus, they acknowledge that emotions are key to people’s ability to fit in within a particular group and to their attempts to negotiate social relations within groups.

For example, symbolic interactionists direct our attention to the role-taking emotions, or those emotions that result from vicariously taking on another person's position (Shott, 1979). They consist of two types of emotions: "reflexive role-taking emotions, which are directed toward oneself and comprise guilt, shame, embarrassment, pride, and vanity; and empathic role-taking emotions, which are evoked by mentally placing oneself in another's position and feeling what the other feels or what one would feel in such a position" (p. 1324). These emotions can be useful for enhancing our understanding of institutional processes because they "further social control by encouraging self-control; they are largely responsible for the fact that a great deal of people's behavior accords with social norms even when no external rewards or punishments are evident" (Shott, 1979, p. 1329). These emotions then can be expected to be at the heart of ensuring that people internalize the values and expectations of a particular institutional order. For example, when people do not measure up to the values enshrined in a particular institutional order, they feel ashamed (Creed, Hudson, Okhuysen, & Smith-Crowe, 2013; Scheff, 1997). Conversely, pride may result from feeling that one measures up to the group expectations exceedingly well (Shott, 1979).

Role-taking emotions play important evaluative roles (Barbalet, 2001), and their experiencing in particular situations is conditional upon being socialized into a particular group and acceptance of its norms and standards (Fields et al., 2007). By offering positive evaluations of some behaviors and negative evaluations of others, communities validate emotions underlying "good" behavior as EC and invalidate other emotions. For example, the ability to project calm demeanor in the face of high stress is celebrated among medical interns (Kellogg, 2011). Role-taking emotions (Shott, 1979) are essential in producing fairly uniform and shared notions of

what is appropriate behavior within a referent group, because they allow people to determine how they and others align with the group expectations.

Another point, related to the above, is that symbolic interactionism allows institutional researchers to better specify the extent to which people are embedded and constrained by the broader societal structures. Such research highlights that certain emotional displays and experiences are prescribed or proscribed to particular people, depending on their social position. For example, certain occupations require more emotional labor than others (Hochschild, 1983; Orzechowicz, 2008), or more emotional restraint than others (Cahill, 1999). Some people might be entitled to ask for and receive more or less sympathy (Clark, 1987). And above all, not all emotional experiences and displays are equally valid for all people. For example, Pierce's (1995) study of a law firm shows that not only were the emotional displays prescribed to men and women differently, contributing to the reproduction of gender inequality, but also that women suffered social sanctions if they engaged in more masculine emotional displays. Thus, although aggressive behavior was appropriate for male lawyers, female lawyers found themselves in a double-bind: either act more like men and be perceived as being too aggressive for a woman or act more feminine and be perceived as a less competent lawyer.

In sum, insights from symbolic interactionism not only help us to humanize institutional processes (Hallett & Ventresca, 2006b) by helping us understand better how people experience institutions and how their emotional experiences and displays are tied to institutional norms, but these insights also help us to shed light on some of the nuts and bolts (Calhoun, 2001) by which the homogeneity and conformism, that are often attended to be institutional scholars, are achieved through insidious and difficult-to-detect taken-for-granted practices.

### **Psychoanalytic and Psychodynamic Perspectives**

Psychoanalytic perspectives, since inception, have been attuned to the inevitable tension between the person's search for individuation and the potency of social and self/other relations that seek to deprive her or him of that desire. These perspectives on emotions have been applied to the study of organizations for decades (Fotaki, Long, & Schwartz, 2012), and I believe they offer intriguing opportunities for investigating the linkages between emotions and institutions.

Although there are a number of theories that fall under this broad umbrella, the relationship between unconscious processes and reality is a central feature of these theories. Much of this work builds on Freud's (2011) recognition that when hopes, dreams, and desires are inaccessible or unattainable to people in their real lives, people unconsciously engage in various processes aimed at protecting themselves from psychological damage. Since then theorists have variously emphasized or deemphasized this split between reality and fantasy, with some scholars working in the Lacanian tradition acknowledging the near-impossibility of people freeing themselves from fantasies and breaking through to the "objective" reality (Driver, 2009; Žižek, 1999). Furthermore, whereas some of these analyses are largely focused on people's efforts to fulfill their psychological needs, others are decidedly political and seek to explain how the various fantasies create and reproduce inequalities, such as class (Contu, 2008; Žižek, 1999, 2000) and gender (Fotaki, 2013) inequalities in the society. What makes this body of work so compatible with institutional analyses, though, is that there is keen recognition that human behavior is not enacted in isolation, but rather it is social in nature and shaped through relations between the self and other, starting with our earliest interactions in life. The psychoanalyst Wilfred Bion, for example, expressed this famously in his notion that human beings are "group animals at war with their own groupishness" (Bion, 1961, p. 41). People are perpetually caught

up in such tensions—between autonomy and dependence, and between cooperation and compliance.

Accordingly, this work tends to conceptualize emotions not as purely internal states of bounded individuals, but rather as inter-subjective experiences that are generated collectively through self/other relations to create short term emotional responses or even more durable emotional dispositions. For example, people might experience their work environment as toxic or abusive, and as a result, even loyal employees that are consciously committed to the wellbeing of their organization might unconsciously retaliate against their customers (Stein, 2007). Or in another example, the impending takeover of a company might cause anxiety for the managers, who might then seek to cope with the resulting feelings of dread and disheartening by projecting them onto employees and experience further shame about the way they take up managerial roles (Vince, 2006).

Emotional experiences serve important functions not only for particular people but also for the collectives. People collectively create idealized images of their organization, and these images help them comprehend and act in relation to collective expectations about performance; however, they also function as containment, control, and instruction in “the way we do things here.” For example, group dynamics researchers argued that emotions could play important roles in negotiating and maintaining group boundaries (Alderfer & Smith, 1982). Others have pointed out that it is not just individual people that engage in defensive routines aimed at protecting them from psychological harm, but that groups and organizations seek to maintain collective self-esteem as well (Brown, 1997; Brown & Starkey, 2000), and as such they might also engage in defensive routines and generate narcissistic fantasies that might maintain high group self-esteem at the expense of the ability to learn and change.

Threats to “the way we do things here” are managed through individual and social defense mechanisms (Argyris, 1992), which protect both people and collectives against the fear that something bad will happen. Therefore, characteristic ways of organizing offer both a supportive structure for constructing knowledge about the organization and a defence against difficult emotions and the fears and anxieties generated by such emotions (Brown & Starkey, 2000; Vince, 2002). Projective identification (Klein, 2002), whereby people identify with the images projected onto them by others, is another example of a collective process that keeps the collective together but perhaps bound to an ongoing negative spiral of resentment, anger, fear and so on (Stein, 2007).

Another psychoanalytic concept that might be useful in institutional analysis is the notion of fantasy. In contrast to Freud’s conceptualization of it as a process that compensates for real-life frustrations, recent theorists have suggested that fantasies facilitate people’s connection to the group by “coordinating our desire” (Žižek & Laclau, 1994, p. 118). Thus the concept can facilitate a better understanding of the affective connection between and the institutional order, which has been overlooked in institutional research (Friedland, 2013). Fantasies are not individual but are shared among organizational members (De Vries & Miller, 1986). Mental health institutions, for instance, can have a fantasy of their function “as a sort of oxidation basin—a place where toxic waste matter can be contained, detoxified, and turned into useful materials” (Erlich-Ginor & Erlich, 1999, p. 205).

Furthermore, fantasies play key roles in sustaining (Driver, 2009) and challenging (Gabriel, 1995) power relations. It is through fantasies that people come to be emotionally invested in the extant institutional arrangements (Voronov & Vince, 2012), and even acts of dissent paradoxically may help people connect with the institutional order more strongly (Žižek,

1999). However, there is a possibility of a subversive role of fantasy. Gabriel (1997) describes how the fantasy of interaction with “the supreme leader,” when organizational members meet the Chief Executive, underpins opposite individual experiences: both the feeling of deep connection to a leader and the loss of faith that arises from feeling “shunned” by him. Under such circumstances fantasy can motivate people to disrupt the institutional order.

In sum, psychoanalytic theory is well-equipped to respond to the challenge of understanding “the subjective ways in which actors experience institutions” (Suddaby, 2010, p. 16). It helps institutional scholars to respond to Friedland’s (2013) important observation that “institutions depend, both in their formation and their core, on a passionate identification” (p. 593), that has rarely been acknowledged in institutional research. This work might be especially helpful in understanding why institutional change is so rare and so difficult, as it enables researchers to grasp more fully the extent to which people are captured by particular institutional arrangements.

### **Moral Psychology**

Although traditionally moral psychology had tended to focus on moral reasoning and to privilege rationality (Haidt, 2001), recent advances have incorporated considerations of both emotions and culture (Haidt, 2001; Rai & Fiske, 2011; Rozin, Lowery, Imada, & Haidt, 1999; Shweder, Much, Mahapatra, & Park, 1997). The aim of this expanded (i.e., social relational) approach, as Rai and Fiske (2011) explain, is “to provide a framework for understanding judgments of virtue, notions of fairness, systems of justice, in-group favoritism and out-group hostility, care and apathy, prejudice, loyalty, leadership and followership, approach–avoidance, and moralized forms of violence, such as spanking, whipping, capital punishment, revenge, torture, honor killing, and genocide” (p. 58). This approach is highly compatible with

institutional analysis, particularly with the recent emphasis on inhabited institutions, because it sensitizes us to the fact that various forms of institutional work are connected to people's moral judgements and intuition – whether with respect to determining whether or not another's action is legitimate (Scott, 2008; Tost, 2011), or whether or not institutional arrangements allow one to be authentic and bring one's whole self to the institutionally prescribed rule (Creed et al., 2010). The appeal of moral psychology is that it acknowledges both the cultural constraints on human psychology and the role of human psychology as a mechanism through which culture comes alive. As Haidt (2012) argues,

You can't study the mind while ignoring culture, as psychologists usually do, because minds function only once they've been filled out by a particular culture. And you can't study culture while ignoring psychology, as anthropologists usually do, because social practices and institutions (such as initiation rites, witchcraft, and religion) are to some extent shaped by concepts and desires rooted deep within the human mind, which explains why they often take similar forms on different continents.

### **Social Movements**

In light of the increased interest in agency and change among institutional scholars, research on social movements has become influential in institutional analysis. The common thread in research on social movements is “an interest in collective contestation and collective mobilization processes – how groups coalesce [...] in order to create or resist new institutional arrangements,” acknowledging that “contestation and collective action rest on the capacity of groups to mobilize resources and recruit members, [...] engage in cultural entrepreneurship or frame issues to increase acceptance of their claims” (Schneiberg & Lounsbury, 2008, pp. 650-651). This welcome development has been helpful not only in making institutional scholars more

adept at analyzing change, but also in painting a less technical and sanitized picture of institutional processes. Contestation, ideologies, power and politics have been made more central to the understanding of how institutions change or to explanations of why they fail to do so (Rao, Monin, & Durand, 2003; Schneiberg & Soule, 2005; Sine & Lee, 2009; Weber, Rao, & Thomas, 2009).

However, the greater infusion of ideas about social movements into institutional analysis has done virtually nothing to transform the fundamentally cognitive view of institutional processes which I criticized above. The explanation seems simple. It is inevitable that drawing extensively on a theoretical perspective causes scholars to import inadvertently some of the theory's "baggage" (c.f., Ferraro, Pfeffer, & Sutton, 2005), and social movements research has suffered from an excessive cognitivism (Benford, 1997; Goodwin, Jasper, & Polletta, 2000, 2004) that is not all that different from organizational institutionalism. Nonetheless, research on social movements has seen an uptick in the analysis of emotional dimensions of social movements, and I would like to suggest that some of these recent advances might be helpful to institutional researchers seeking to incorporate emotions into institutional analysis.

The first issue is one of emotional resonance. The research on social movements has dedicated a great deal of attention to the issue of framing, or the process of generating collective action frames – shared interpretations that enable movements to diagnose grievances, enroll members and organize for collective action (Benford & Snow, 2000). However, recent social movement research has highlighted the importance of emotional resonance in facilitating the effectiveness of framing attempts. Quite simply, not only must collective action frames organize the social world in a coherent manner, but they must also spur people to action (Calhoun, 2001),

create a sense of solidarity (Polletta & Jasper, 2001), and help suppress fears in situations that might be dangerous (Goodwin & Pfaff, 2001).

Relatedly, a number of social movements researchers are now attuned to the importance of emotion work throughout various phases of the social movements (Goodwin & Pfaff, 2001; Schrock, Holden, & Reid, 2004) that is required for generating and sustaining emotional commitment to the movement, managing solidarity, collective identity and affectual ties (Goodwin, 1997; Polletta & Jasper, 2001).

In another related line of research, moral shocks, or provoking righteous outrage in people, (Jasper & Poulsen, 1995) have been identified as key to moving people from apathy and sidelines to active support of various causes, such as animal rights. For instance, Scheff's (2006) study of the memorial against the US Iraq invasion highlights the importance of moral shock as a vehicle for triggering hidden and unacknowledged emotions that overcome the defensiveness and rationalization that results from a purely cognitive denaturalization. Yet, it is also noteworthy that not all people are likely to experience moral shocks in the same way, with some experiencing denaturalization as a result, while others may take offense and be alienated by the attempts to trigger moral shocks (Jasper, 2010; Mika, 2006; Scheff, 2006).

In sum, recent research on social movements that has taken emotions seriously can offer some valuable insights for institutional scholars seeking to incorporate emotions into institutional analysis. Prior attempts to integrate social movements research into institutional analysis have already been fruitful, and it is clear that the two perspectives are compatible. Yet, it is important to acknowledge that social movements involve a great deal of "hot emotions" (Rao, 2009), and that the contestation over maintaining or disrupting institutional arrangements is an emotional process, rather than a purely cognitive one.

## **POSSIBLE RESEARCH DIRECTIONS**

Having reviewed, briefly, several theories that might provide institutional researchers with concepts and vocabularies for integrating emotions into institutional analysis, I now discuss some possible research directions for investigating emotions in institutional theory.

### **Embedded Agency**

One of the most central issues in organizational institutionalism has been the paradox of embedded agency, which can be summarized as follows: “How can actors change institutions if their actions, intentions, and rationality are all conditioned by the very institution they wish to change?” (Holm, 1995, p. 398). This has been a perplexing issue to institutional scholars, and researchers in such areas as institutional logics (Thornton et al., 2012), institutional entrepreneurship (Battilana, Leca, & Boxenbaum, 2009) and institutional work (Lawrence & Suddaby, 2006) have all attempted to address it. Institutional contradictions, or “ruptures and inconsistencies both among and within the established social arrangements” (Seo & Creed, 2002, p. 225) have been recognized as key to resolving this paradox, because they “may facilitate a change in actors' consciousness such that the relative dominance of some institutional arrangements is no longer seen as inevitable” (Seo & Creed, 2002, p. 233). In other words, institutional contradictions are believed to trigger epiphanies, whereby actors come to recognize the nature of their interests, how these interests are served poorly by the current institutional arrangements and become motivated to change them. Since then institutional scholars have garnered many insights into the factors that are likely to lead to institutional contradictions, and how actors respond to them (e.g., Hargrave & Van de Ven, 2009; Kraatz & Block, 2008; Pache & Santos, 2010). However, the conceptualization of agency as resulting primarily as a response to institutional contradictions arguably “sidesteps” rather than resolves the embedded agency

problem (Mutch, 2007; Willmott, 2011), because it in effect attributes more agency to institutions than to people and does not acknowledge that there are different ways for people to engage with institutions (Lok, 2007; Lok & De Rond, 2013). Agency, in essence, is a result of institutional accidents of sorts. Furthermore, and perhaps more troubling, if institutional contradictions are a requirement for agency, then people's failure to grasp these contradictions (e.g., Voronov & Vince, 2012) would effectively deny the possibility of agency and devolve institutionalism into a structuralist account.

The study of emotions may offer an opportunity for institutional scholars to gain genuine insights into how people engage with institutions and how they change their agentic orientation (Battilana & D'Aunno, 2009; Emirbayer & Mische, 1998), with or without institutional contradictions. For example, a greater attention to emotions may enable researchers to detect the different forms of epiphanies resulting from the presence of institutional contradictions. Thus, whereas people might have conscious awareness of the institutional contradictions, the potential lack of emotional detachment or disinvestment from the institutional order they take for granted and that constitutes their subjectivities and desires might render such cognitive epiphany of limited utility in triggering institutional change (Glynnos, Klimecki, & Willmott, 2012).

This simple insight forces institutional scholars to wrestle with at least two related problems. First, it might be necessary to separate the objective existence of institutional contradictions from people's ability to apprehend and respond to them in a constructive manner. In other words, does it matter that institutional contradictions exist, if people are unable to gain sufficient emotional distance from the dominant institutional order that constitutes their subjectivity to be able to act to change it? Drawing on insights from the various streams of research on emotions that I reviewed above indicates that it is not only people's cognition that is

domesticated and shaped by an institutional order. Such apprehending of institutional contradictions should be seen as being qualitatively different from a simple process of correcting errors in cognition, wherein a simple presentation of novel information (e.g., that the current institutional arrangements are not advantageous in light of one's interests) and require researchers to study the extent to which a person detaches herself or himself from the dominant institutional order. People might also be invested in institutional arrangements emotionally (Contu, 2008; Stavrakakis, 2008).

Second, the question that we might need to ask is whether such epiphanies must necessarily involve an ability to consciously identify the institutional contradictions and their misfit with one's interests. Research in social movement implies that such spontaneous reactions as anger (Polletta, 1998) or moral shock (Jasper, 2010; Jasper & Poulsen, 1995) might be significant enough to motivate people to change institutional arrangements – even in the absence of conscious articulation. Being able to identify institutional contradictions verbally and formally may not imply that a person does not retain emotional investment in the dominant institutional order; and being unable to articulate the institutional contradictions consciously does not necessarily mean that a person has not gotten emotionally detached from the institutional arrangements and is working – perhaps unconsciously (Andreas, 2007; Stein, 2007) – to subvert them. Thus, attending to emotions might prompt researchers to not conceptualize rational articulation of institutional contradictions as either necessary or sufficient indication of a person's disinvestment from the dominant institutional arrangements.

In sum, under the circumstances when institutional contradictions result in the rational recognition of the poor fit between the extent institutional arrangements and a person's interests, but no emotional detachment or disinvestment from the institutional arrangements is

accomplished, people's likelihood of becoming institutional change agents is reduced (Voronov & Vince, 2012), though not eliminated. It is necessary then to study more carefully the nature of epiphanies that might be necessary to alter a person's agentic orientation. Under what circumstances might cognitive disinvestment be enough, and when might both emotional and cognitive disinvestment be needed? Do different institutional orders differ in this regard? What makes some people more likely than others to apprehend institutional contradictions?

## **Power**

The study of emotions can help to recognize the pervasive role of systemic power (Lawrence, 2008) in institutional processes by understanding the affective bases of people's connection to a social order and social structure. Power was a central part of the so-called old institutionalism (Hirsch & Lounsbury, 1997), but it has been overlooked and poorly integrated in neo-institutionalist thought (Hinings & Tolbert, 2008). When power is theorized in neo-institutional research, it is mostly as episodic power, the power of particular actors who possess and deploy it in concrete situations (Lawrence, 2008). The more systemic dimensions of power, such as domination, are left aside in this form of analysis (Cooper, Ezzamel, & Willmott, 2008; Mizruchi & Fein, 1999). This criticism of institutional research is not new. In their classic chapter, Friedland and Alford (1991) criticize neoinstitutional researchers for offering "an institution-free conception of interest and power" and assuming "objective interests that can be understood independently of the actors' understanding" (p. 244).

The rise to prominence of the institutional logics perspective (Thornton et al., 2012), along with the increased drawing from the research on social movements by institutional scholars (e.g., Davis, McAdam, Scott, & Zald, 2005; Weber, Heinze, & DeSoucey, 2008; Weber et al., 2009), have made institutionalization and deinstitutionalization appear less technical and

clean, foregrounding the contestation. Hence, episodic aspects of power have been recognized more frequently in the recent turn towards studying the micro-foundations of how institutions are created, maintained and disrupted in practice (Lawrence & Suddaby, 2006; Powell & Colyvas, 2008). But systemic power has yet to be integrated into the core of institutional research. Systemic power operates through institutional processes such as shaping people's subjectivity (Friedland & Alford, 1991) and constraining the forms of institutional work available to people (Lawrence & Suddaby, 2006). I think that integrating emotions into institutional analysis may facilitate a more profound recognition of systemic power in institutional processes, as well.

The inattentiveness to or exclusion of systemic power from institutional analyses is somewhat surprising, in light of the fact that the very essence of institutionalization is to make the potentially arbitrary social arrangements take on the appearance of objectivity and become unquestionable, such that alternatives are unthinkable (Lawrence & Suddaby, 2006). There is a long history of social theorists, ranging from Marx and Gramsci, to Foucault, Bourdieu and Zizek, whose work highlights that such taken-for-grantedness results from the operation of power, whereby one group's interests are reified and universalized, while those of other groups are marginalized. To put it simply, a key function of institutional arrangements is to control people, so that they control themselves and elites do not have to constantly engage in repressive practices. In fact, the reciprocal emotion management among those who are privileged and those who are marginalized by the institutional arrangements might be complicit in the maintenance of inequalities (Gray & Kish-Gephart, 2013). So far, engagements with such critical theories among institutional scholars have been limited (Cooper et al., 2008; Lawrence et al., 2011; Willmott, 2011).

The first question that deserves considerable exploration is how people become invested in the institutional arrangements, which is a prerequisite (Kintz, 1997; Voronov & Vince, 2012) for institutions to have any kind of an ability to control people. Our lived experience tells us that people do not simply accept or tolerate particular institutional arrangements. Rather they internalize the values of particular institutional orders, and rely on these to understand their world and themselves (Contu, 2008). Further, they come to care deeply for these arrangements, such that they derive their sense of self from them, and these institutional arrangements impact multiple spheres of their lives. For example, the study by Covalleski, Dirsmith, Heian, and Samuel (1998) demonstrates that the institutional arrangements that control work life may also control people's non-work life sphere. But we do not know enough about the processes through which a person is transformed into a particular kind of an institutional actor, and the study of how a person's emotional investment in an institutional order is shaped and reshaped is key to understanding such blending of the institutional and the personal.

The second question that might be valuable to explore, representing the flip-side of the above, is: what can the study of emotions teach us about the limits of institutional control? As insights from the psychoanalytic studies show, human beings are never completely governable. Thus, although there are debates whether various acts of organizational misbehavior and cynicism are effective in bringing about genuine institutional transformation (Contu, 2008; Fleming, 2005; Fleming & Spicer, 2003), they do represent some sort of attempts (perhaps unconscious) to wrestle with the totalitarian control of institutional arrangements. Further, these various acts of misbehavior or resistance may not necessarily be accessible for conscious reflection (Stein, 2007). Yet, all of this points toward the intriguing possibilities that emotions might hold keys to understanding better the limits of institutional control.

## **Theorization**

The notion of theorization (Strang & Meyer, 1993) which refers to “the rendering of ideas into understandable and compelling formats” (Greenwood, Suddaby, & Hinings, 2002, p. 75), which develops abstract categories and patterned causal relationships, and interactions between them (Strang & Meyer, 1993). The resulting categories and relationships can be vehicles for individual actors’ attempts to make sense of the field in which they operate (Weber & Glynn, 2006). Theorization has been recognized as an important process not only in institutional theory but in other areas of organization studies, such as management innovation (Birkinshaw, Hamel, & Mol, 2008), and entrepreneurship (Hwang & Powell, 2005; Svejenova, Mazza, & Planellas, 2007). It has been utilized to explain how change is initiated (Strang & Meyer, 1993), normalized (Birkinshaw et al., 2008; Lounsbury & Crumley, 2007) and stabilized (Greenwood et al., 2002).

With the emphasis on the structuring of interlinked categories, so far theorization has been conceptualized as a cognitive process. But because theorization is believed to motivate people toward change, it must have an under-theorized emotive component. In Greenwood et al.’s (2002) study of institutional change in the field of accountancy the researchers focused on the role of theorization in motivating change and attempting to get actors to adopt new practices. In Maguire et al.’s (2004) study the more political aspect of theorization is acknowledged, whereby it is used to align and reconcile actors’ divergent interests. Implicit in these studies are the insights of social movement scholars who argue that people are not moved to action merely through distilling a variety of complex social phenomena into neatly organized cognitive chains, but rather these narratives must have emotional resonance (Benford, 1997; Rao, 2009; Schrock et al., 2004).

I am not implying weaknesses in the extent studies of theorization. Rather, I think research on theorization can advance further by explicitly attending to the role of emotions. Whereas researchers have attended to how theorizations are produced, I suggest, that it is important to understand whether and how they are in fact received by audiences. Are there instances of failed theorizations that have not produced the desired or expected outcomes? What role might emotions play in enabling successful theorization efforts or in hindering such efforts?

### **Institutional Logics**

Institutional logics is an increasingly dominant stream of research in institutional theory. The notion refers to the overarching principles that “provide guidelines on how to interpret and function in social situations” (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011, p. 318). Whereas, the importance of micro-foundations and micro-processes of institutional logics are increasingly recognized, the emotive aspects of institutional logics are not. It can be argued that each logic encompasses not only a set of cognitive schemas and identities (Thornton et al., 2012), but also emotions that are associated with those schemas and identities. As Friedland and Alford (1991) argue, institutional logics do not merely prescribe particular kinds of behaviors, but they also make these behaviors meaningful and make it possible to evaluate them as desirable or undesirable. Making evaluations is not purely a rational or calculated process, and at a minimum we need to acknowledge emotional reactions that are intrinsic to evaluating our own and others’ behavior with respect to its compliance to the institutional norms (Scott, 2008) codified by particular logics. I would suggest that a fruitful direction for future research in institutional logics might involve identifying how a particular logic constructs and shapes not only cognitive processes and organizes schemas but that it also prescribes and proscribes certain emotions.

For example, the market logic can be expected to be associated with different sets of emotions than the aesthetic logic. Hence, it is not surprising that fields in which the aesthetic logic plays a significant role, such as fine dining (Svejenova et al., 2007), fine wine (Beverland, 2005), theater (Orzechowicz, 2008), film (Alvarez, Mazza, Pedersen, & Svejenova, 2005), and so on, are organized around being able to simulate emotional connections between producers and consumers, projecting passion, disinterestedness in profits (Bourdieu, 1983) of emphasis on authenticity (Glynn & Lounsbury, 2005; Peterson, 2005) – an inherently emotional characteristic (Alexander, 2004). A different set of emotions is prescribed in fields where the market or the bureaucratic logics might be more dominant. Thus, when mapping various institutional logics along the Y-Axis (c.f., Thornton, 2004; Thornton et al., 2012), with respect to sources of legitimacy, authority, identity, and bases of norms, attention and strategy, among other factors, I suggest that the category of “appropriate emotions” should be included in order to identify what emotions are associated with which logic.

Yet, I would like to push this argument even further. Because the distinction between emotion and rationality is not objective but constituted rhetorically (Edwards, 1999), and that which is defined as “rational” is often legitimized, those emotions that can be instrumentalized and aligned with the dominant institutional logic tend to be subsumed under the logic-dictated understanding of rationality. Often such emotions might even be rendered invisible as emotions. For example, greed might become invisible as an emotion while acting as a driving force behind the market logic. Instead, in fields where the market logic is dominant, greed might be rhetorically reconstituted into “rational choice” (Ferraro et al., 2005; Ghoshal & Moran, 1996). This argument is consistent with prior research in discursive psychology that shows how people expend considerable effort in trying to construct accounts that are putatively objective – or

rational – and not influenced by their own desires and biases (Potter, 1996; Sampson, 1993; Wetherell & Potter, 1992).

In contrast, emotions that are not consistent with the dominant logic tend to be constituted as emotions and cast in opposition or in conflict with whatever is “rational”. As such, they are often apprehended as illegitimate or at least detrimental to rationality. For example, in regard to Fletcher’s (1999) study, of “disappearing acts,” whereby various relational practices in an engineering firm, operating presumably under the professional logic, “get disappeared,” and get constructed “as something other than work” (Fletcher, 1999, p. 103). It is apparent then that the various emotions, such as empathy, care (Lawrence & Maitlis, 2012), compassion (Frost, 2003) and so on, that underlie these relational practices and that are inconsistent with the individualistic and macho ethos of the professional logic under which the firm operated were either deemed illegitimate themselves or contributed to the practices that were not valued and even disparaged.

The above suggests that another fruitful direction for attending to emotions in the context of institutional logics research might involve examining the extent to which particular local manifestations of institutional logics constrain people’s emotional experiences and the extent to which such constraining of their emotional experiences might also place invisible on constraints on people’s opportunities to act as champions of alternative logics or to become defenders of the currently dominant one. More broadly, it would enable us to examine how logics are experienced (Suddaby, 2010) and liberating us from the assumption that logics are reified macrostructures that exist “out there”.

## **CONCLUSION**

In light of the increased recognition that institutional processes should be theorized and studied as inhabited (Hallett & Ventresca, 2006b), it behooves institutional scholars to incorporate emotions into the core of their studies. My intention has been to offer some personal reflections on how this might be done and some possible pitfalls that may result from a failure to conceptualize emotions in institutional processes in a relational manner. Emotions need to be conceptualized as inherently social, dynamic and contextualized processes (c.f., Gooty et al., 2009). Thus, in choosing theories to draw from, I have encouraged institutional scholars to err on the side of such dynamism and context-dependence. In order to underscore that studying emotions in the context of institutional processes is not merely an exercise in filling esoteric lacunae, I concluded by suggesting some possible research directions that I believe demonstrate that the study of emotions can further energize institutional analysis.

I would like to conclude by noting that empirical work at the junction of emotions and institutions does not, in my view, present unusual challenges. Indeed, a cursory examination of some recent institutional studies, like Kellogg's (2011) study of reforms at teaching hospitals or Dacin et al's (2010) study of formal dining rituals at Cambridge and Oxford (among others), reveal abundance of emotions that might play important roles in explaining some of what transpired in those cases. Thus, it seems to me that the key is a robust toolkit of constructs that can be used to incorporate them into rich studies that institutional scholars are already conducting. My intention has been to move us toward developing such toolkits.

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