
**How do Followers Distance Themselves from Leaders?
An Interpretive Study of Followership in Physical and
Non-physical Contexts**

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Declaration

I declare that this PhD thesis, entitled “*How do Followers Distance Themselves from Leaders? An Interpretive Study of Followership in Physical and Non-physical Contexts*”, is my own work and has not been submitted in the same form elsewhere. This thesis has been developed, within the agreed limits, for the award of Doctor of Philosophy (PhD) in Management Learning and Leadership under the guidance and supervision of Prof. Claire Leitch and Prof. Valerie Stead in the Department of Entrepreneurship and Strategy, Lancaster University Management School, UK.

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Diansha Wang

*To my husband,
In memory of happy days in Lancaster;
To my parents,
Who support me unconditionally*

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Some of the ideas in this thesis have been presented at conferences, as shown below:

17th International Studying Leadership Conference (Lancaster University, 2018)

“Trust and Surveillance in Followership Hybrid Contexts”

35th EGOS Colloquium: Leadership Development for a post-truth, post-human and post-organizational world (University of Edinburgh, 2019)

“Follower Role Crafting: Setting the Front and Back Stages in Hybrid Contexts”

11th International Critical Management Studies Conference: Doctoral Student and Early Career Researchers Stream (Open University, 2019)

“How do Followers Distance Themselves from Leaders?”

BAM Annual Conference: Leadership and Leadership Development (Aston University, 2019)

“Forgotten but not Gone: Bringing Physical and Non-physical Contexts back into Followership Research”

IAM Annual Conference: Leadership and Organizational Behavior (National college of Ireland, 2019)

“Forgotten but not Gone: Bringing Physical and Non-physical Contexts back into Followership Research”

Abstract

The topic of followership has been attracting growing attention as a response to the dominance of leader-centric assumptions in the leadership research field. However, the followership literature does not adequately consider followership as a complex phenomenon in terms of two research gaps. First, the followership literature pays excessive attention to follower traits, characteristics and roles, and tends to identify what good or effective followers are. This may confine a follower in a subordinate position within traditional asymmetric structures and reproduce a binary opposing relationship between followers and leaders. The second gap is the failure to consider the impact of follower-leader interrelations on shaping understandings and meanings of the followership context. The literature describes a hierarchical context as a setting where followers have to hold formal roles and accept asymmetric positions relative to leaders. Informed by a critical approach to studying followership, this study aims to explore followership complexity from two aspects. First, it examines the ways in which followers interrelate with leaders and peers to construct follower-leader relationships. Second, it investigates how physical and non-physical contexts shape and are shaped by these relationships simultaneously. An interpretivist approach, influenced by an inter-subjective ontology, underpins the research, which comprises a single case study of a financial analysis organization with 30 participants. Financial assistants as followers interrelated with managers as leaders in the same workplace, and they belonged to a financial analysis organization. These assistants simultaneously interacted with remote analysts as leaders in different locations and global financial institutions, where they employed email and telephone to communicate, and then construct relations, as a result of interrelations. The findings reveal key insights into followership related to the overarching concept of follower-leader distance. This concept is understood in two important aspects, five dimensions (physical, psychological, cultural, functional and structural) and two degrees (proximity and detachment). Five dimensions capture the multi-faceted and constructed nature of follower-leader relationships, which were shaped by ongoing followers' interrelations with leaders and peers; the dimensions also reveal the diverse characteristics of physical and non-physical contexts, which were shaped as distinct opportunities and challenges to which followers needed to respond. Two degrees of follower-leader distance illuminate the potentially dynamic and tense nature of the follower-leader relationship; they also demonstrate the interdependence of physical and non-physical contexts, arising from followers' inter-relations with different leaders in two different contexts. This study makes two significant theoretical contributions to followership research. First, this study moves beyond a static and objective conceptualization of the follower-leader relationship towards a more social, dynamic and situated conceptualization. Second, this study extends critiques of the followership context as a setting where followers are confined within hierarchical structures and informs a more nuanced interpretation of the complex nature of the followership context.

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Chapter 1: Introduction

Followership research is important to understand the dynamics of relationships between followers and leaders in their embedded contexts (Bligh, 2011; Carsten et al., 2010; Uhl-Bien, 2014; Riggio, et al., 2008). Existing followership research has focused on exploring follower traits, characteristics (Bensen et al., 2015; Junker and Dick, 2014; Sy, 2010) and role responsibilities (Cunba et al., 2013; Kellerman, 2008; Shamir, 2007). Based on these aspects of followership, scholars help to make a distinction from leadership research with an explicit focus on aspects of leaders and leadership ((Bligh, 2011). They also make considerable efforts to identify what good or effective followers are (Chalief, 2008; Howell & Mendez, 2008; Kelley, 1988, 2008), and the development of effective followership models has become an accepted focus of scholarly research in the field of followership (Riggio et al., 2008). However, in recent years, there has been a growing debate on whether followership research is following a similar trajectory to leadership research, by maintaining a conventional managerial focus on followers' contributions to organizational performance (Collinson, 2005a, 2006, 2011, 2014; Einola & Alvesson, 2019; Ford & Harding, 2015; Tourish, 2014). In this sense, a follower is simply placed in a traditional asymmetric structure in relation to a leader. Consequently, a follower remains 'an empty vessel waiting to be led, or even transformed by the leader' (Goffee & Jones, 2001, p. 148).

In this study, I echo the calls made by followership researchers (e.g. Carsten et al., 2010; Collinson, 2006; Tourish, 2014; Uhl-Bien, 2014) over the past 20 years to reconsider what followership means. I aim to develop an enhanced understanding of followership in both physical and non-physical contexts. Followership is no longer something that is simply measured by follower traits, characteristics and role responsibilities, but a complex phenomenon relating to the ways in which followers interrelate with leaders and peers in these specific contexts to develop follower-leader relationships. A physical context refers to a face-to-face setting where people physically meet and work in the same place. A non-physical context refers to a setting where people are located in different places and do not meet face-to-face, rather they employ communication tools to build interrelations and relationships. In my case, there is a group of financial assistants working with managers in the same organization and workplace, and these assistants simultaneously interrelate with remote financial analysts from different organizations in different places. I label these financial assistants as followers, because they demonstrate a certain degree of obedience towards managers and remote analysts in the two contexts. Two types of leaders are involved: one is a manager who shares a degree of formal hierarchy with those financial assistants in the physical context; the other is a remote financial analyst, in the non-physical context, who is an expert in the financial analysis field and establishes parameters that followers needed to meet.

This chapter presents the preliminary stage of the thesis and explains why the followership topic is worthy of investigation. It is structured as five parts. First, I explain my academic curiosity in followership, by tracing the source of a limited understanding of followership in the foregrounding leadership literature and showing my two primary interests in the followership phenomenon. Second, I elaborate my practical curiosity in followers, relating to a science fiction film and a friend's remote working experience. Third, I summarize two knowledge limitations in the current followership literature. Next, based on potential limitations, I present the research aim and two research questions, which will run throughout the whole thesis. Finally, I give an overview of the structure of the thesis and draw a brief conclusion.

1.1 Academic Motivation in Followership

Academic and practical reasons involved explain why followership is a topic worthy of exploration; especially, I elaborate why followership should be considered a complex phenomenon, in terms of the dynamics of follower-leader relationships in specific contexts. This section clarifies two important concerns related to my academic motivation to study followership. First, the adoption of a followership lens allows a shift in the research interest, from studying individual, heroic and powerful aspects of leaders to considering followers as equally influential in the development of the relationships between followers and leaders. This shift enables me to perceive followership as an equally significant issue as leadership, instead of a sub-topic contributing to a new conception of leadership. Second, the adoption of a followership lens addresses issues concerning how followers interrelate with leaders and other actors, such as peers in specific contexts. This focus on followership is particularly valuable, as followers' interrelations with multiple relevant actors can be viewed as the basis for shaping the dynamics of follower-leader relationships, and it helps to move beyond an understanding of a binary opposing relationship often assumed between followers and leaders. In this way, our perspective on the dynamics of follower-leader relationships and the followership phenomenon is extended to a significant extent.

To begin with, recent decades have witnessed increased attention being paid to the role of followers in follower-leader relations, marked by a shift from viewing followers as 'passive vessels' to individuals who have a more active role to play in shaping the relationships with their leaders. Traditional leadership studies have examined multiple aspects of individual leaders, such as traits, characteristics, behaviours and qualities. Trait studies, for example, tend to describe leaders as self-confident, intelligent, knowledgeable and responsible (e.g. Colbert et al., 2012; Xu et al., 2014). It is not surprising that those scholars put the spotlight on how leaders inspire and influence followers, and how their visions and strategies promote organizational objectives (Riggio et al., 2008). Despite the importance of leaders in leadership processes, our understanding of followership is firmly grounded in an effective leadership model, where leaders are

assumed to be the most important agents in creating and managing organizational objectives, with followers being treated as subordinates. In this way, a leader-follower dichotomy is evident, where followers are treated as “recipients or moderators of the leader’s influence, and as vehicles for the actualization of the leader’s vision, mission, or goals” (Shamir, 2007, p. x).

In response to and to challenge these traditional leadership viewpoints, scholars who develop follower-centric theories have attempted to relax the leader-centric assumption, by emphasizing the impact of followers and following. However, the problem is that they have still been unable to articulate a sophisticated understanding of the follower-leader relationship and followership. Meindl et al. (1985), for instance, put forward an important critique of ‘the romance of leadership’; unfortunately, there is still a treatment that sees leaders as causal agents in determining their relationships with followers and the meaning of the leadership context. Shamir (2007) also sought to introduce more active roles for followers, such as ‘moderators’, ‘co-producers’, ‘constructors’ and even ‘substitutes’ for leadership, instead of merely ‘recipients’ of leadership. But the danger is that scholars tend to retain a conventional focus on followers’ contribution to effective leadership and organizational performance (Collinson, 2011).

To move beyond this, followership scholars propose developing a more nuanced understanding of what followership actually means and how it differs from leadership. There are two crucial concerns that arise from the body of followership research. First, putting a primary focus on followership means shifting the attention away from leaders and leading, to followers and following. As Uhl-Bien (2014) defines it, the research on followership is about exploration of the nature and impact of followers in relation to leaders. This suggests that our followership research focus should be put on the ways in which followers work together with leaders and other actors, instead of how leaders lead followers.

A second concern is to draw particular attention to the dynamics of follower-leader relationships and the followership phenomenon. Given the focus on followership instead of leadership, followers and leaders are inextricably linked and interdependent (Bligh, 2011; Collinson, 2002, 2011; Ford & Harding, 2015; Einola & Alvesson, 2019). While followers play a significant role in mobilizing their relations with leaders, leaders are still important, and even crucial, in decision-making processes, due to the positions they hold, and the skills and experience they present to followers (Shamir, 2017). By exploring follower-leader relationships, this study has a primary interest in how followers interrelate with leaders and other actors, such as peers in specific contexts, which can be highly influential in shaping follower-leader relationships. The term follower is foregrounded, making a clear distinction from relationships of leadership where a leader is assumed to be the key agent in creating and managing relationships with their followers. A follower is one who is also ‘proactive, self-aware and knowledgeable’, seeking to understand, evaluate and develop their relationship with a leader (Collinson, 2011, p. 185). Accordingly, this permits a more nuanced appreciation of how followership as a complex phenomenon occurs.

1.2 Followership in Physical and Non-physical Contexts

This section explains why I want to explore two particular types of contexts, based on two of my personal experiences in terms of a fiction movie and a friend's work experience. First, my initial curiosity in these contexts arises from a science fiction film called *Her*, that I watched six years ago. The movie talks about a lonely writer called Theodore who experiences become fascinated with a charming female voice called Samantha, created through a computer operating system, after he is heartbroken after a divorce. He gradually desires to chat with *her* every day, and even wishes to develop their friendship deeply, into eventual love. Her voice brightly greets him in the morning and softly says good night in the evening, which saves him from solitude. Below is an impressive excerpt of dialogue from the film, showing the first time the writer talked with *her* and felt kind of weird.

Samantha: You think I'm weird?

Theodore: Kind of.

Samantha: Why?

Theodore: Well. You seem like a person but you're just a voice in a computer.

Samantha: I can understand how the limited perspective of an inartificial mind might perceive it like that.

You'll get used to it.

(Theodore laughs)

Talking with a remote 'person' or object is a very different experience from a face-to-face conversation. In this movie, I was deeply impressed by the untouchable and ungraspable relation that made the writer so powerless to come closer to *her*, who was coming from a remote machine world. This reminded me of the relationships being constructed in contemporary globalized and digitized organizations, where employees are busy texting, sending emails and making calls to remote others in different places. This context has some differences from that in this movie, where the character talks with a remote robot, in that both parties are real human beings in work environments. But there is some similarity in that while employees do not meet each other regularly, or never meet each other, they may be building up new relationships with each other, which could be different from those developed in a face-to-face context. In the followership field, Collinson (2005) has called for developing more accounts examining to what extent follower-leader relationships can be established, sustained and transformed in both physical and non-physical contexts, as followers can employ diverse resources to establish different relationships with different leaders in different contexts.

Furthermore, my curiosity in physical and non-physical contexts developed further, after listening to a friend talking about her work experience with remote leaders. She worked at a financial analysis outsourcing organization where a group of financial assistants was required to develop and maintain collaborative relationships with remote financial analysts in global financial institutions. This later became my case-study organization. Via emails and telephone calls, she communicated with her analyst every day regarding issues related to writing financial analysis reports. During our conversation, she pointed out explicitly that the remote analyst was the most important person in her working relations, although she had daily and frequent interrelations with managers and peers in the same workplace. What was interesting is that she had never physically met the in the previous two years, and she gained very limited information about the analysts' projects and their analysts' personalities, and the work environment in which the analyst was embedded. In spite of the absence of face-to-face interrelations and sufficient knowledge of the leader, the follower presented a rather positive impression of the leader, instead. The follower's experience motivated me to look in depth at how followers understand and construct their relationships with different leaders in physical and non-physical contexts. Follower-leader relationships, in this sense, can be seen as more multifaceted, shifting and uncertain than previously recognized in leadership research, as followers interrelate with different types of leaders in two different contexts.

1.3 Limitations in the Literature

In this section, I now highlight two research gaps I have identified in the body of followership research, and these two gaps lay the foundations for developing two research questions for the study, respectively, as shown in the next section.

First, the followership research tends to construct a binary opposing relationship between followers and leaders, by exploring followers in isolation from their leaders and peers and their embedded contexts. There are different types of good or ideal followers in terms of different follower traits, characteristics and roles (e.g. Carsten et al., 2010; Kelley, 1998, 2008; Sy, 2010). These followership models have started to appreciate the potential of followers who learn to follow effectively and support leaders in order to achieve organizational objectives (Crossman & Crossman, 2011). However, by identifying multiple types of followers, ranging from passive, active to proactive (Carsten, et al., 2010; Kelley, 2009), the literature carries the risk of confining effective followership models within a traditional managerial focus on followers' contribution to organizational objectives (Collinson, 2011; Tourish, 2014). To advance our current understanding of followership, this study argues that these studies would benefit from greater consideration of the ways in which follower-leader relationships are shaped and reshaped in terms of followers' interrelations with leaders and other actors. This should help us to rethink the followership

phenomenon in a much more dynamic and complex way. This means that followership cannot be merely understood as something fixed or stable, relying on the identification of follower traits, characteristics and roles; rather, it can be conceived as a complex phenomenon in terms of the dynamics of follower-leader relationships whose meanings are produced through the ways in which followers interrelate daily with leaders and peers in specific contexts. By looking into the micro-dynamics of followership, therefore, we can move beyond the narrow viewpoints on follower-leader relationships found in the literature and advance our knowledge of how followership actually occurs.

Second, the followership literature needs to embrace a broader understanding of the physical and non-physical contexts where followership occurs and have more appreciation of the impact of follower-leader interrelations on shaping the meanings of contexts. There is growing sensitivity to capturing different types of contexts where followership takes place and recognizing different opportunities and constraints followers may need to tackle (House et al., 2004; Kelley, 2008; Uhl-Bien & Carsten, 2016). Nevertheless, the hierarchical relationship between followers and leaders provides a setting where followers are assumed to blindly adopt fixed elements, such as formal structures, structures and role responsibilities (Uhl-Bien & Carsten, 2016). This has the danger of neglecting the micro-foundations of the followership phenomenon and the influence of follower-leader interrelations on the meanings of embedded contexts. That is, there is limited understanding of how geography, politics and socio-economic issues are involved in followership contexts and how followers deal with them during their interrelations with leaders and peers. To advance the prior perspective, this study suggests developing a greater appreciation of how followers' interrelations with leaders and peers can be influential in shaping the features of physical and non-physical contexts, which in turn become distinct opportunities and challenges for followers to deal with. In other words, there is an inseparable relationship between the two contexts and follower-leader interrelations.

1.4 Research Aim and Research Questions

According to the two research gaps I have identified in the followership research field, this study aims to explore followership as a complex phenomenon in physical and non-physical contexts. Hence I formulated these two research questions that respond specifically to these two gaps:

Q1: How are follower-leader relationships shaped and reshaped through followers' interrelations with other actors?

Q2: How do physical and non-physical contexts influence shaping follower-leader relationships?

The first question addresses the first gap I identified in the followership literature. The emphasis on interrelations highlights that the development of a follower-leader relationship relies on the capability and opportunity of followers to interrelate with leaders and other actors such as peers in specific physical and non-physical contexts, instead of hierarchical structures that confine followers and leaders to binary opposing relationships. As will become evident in the following chapters, follower-leader relationship development is not just fundamentally related to followers' interrelations with leaders, but also related to followers' interrelations with their peers, because peers are influential in shaping followers' understanding of and behaviour towards their leader. Thus, this question invites the researcher to look at diverse actors with which followers interrelated, which establishes the basis for growing a better understanding of the dynamics of follower-leader relationship in particular and the followership phenomenon in general.

The second question addresses the second gap in the followership literature. It concentrates on developing a more nuanced understanding of physical and non-physical contexts, which are not simply fixed and stable settings in terms of hierarchical structures and positions but can be mediated and constructed by followers' interrelations with leaders and peers, so as to shape distinct opportunities and challenges that followers, in turn, must deal with. On this basis, I am able to appreciate physical and non-physical contexts as a much more inter-relational phenomenon and move beyond previous studies' narrow view of them. This can help to articulate new ways of thinking about the dynamic interplay between follower-leader relationships and followership contexts and capture followership as a complex phenomenon.

1.5 Thesis Outline

This section provides a brief overview of the thesis.

Chapter 2 – Literature Review

This chapter critically reviews two research gaps in the followership research and establishes a theoretical positioning appropriate to this study. It discusses three facets of existing literature: followership approaches, followership context and follower-leader distance, which informs our understanding of followership as a complex phenomenon.

Chapter 3 – Research Methodology

This chapter presents the methodological foundations of this study. It develops the philosophical position of the study, i.e. inter-subjective ontology and an interpretivist approach, as the basis for research choices. It justifies employing a single case study, the access issue, semi-structured interviews, transcription and translation.

Chapter 4 – Data Analysis

This chapter gives the reader a full account of the inductive data analysis process, ranging from producing codes, categories and themes to a theoretical understanding of empirical data. It explains how the analysis process is consistent with the research aim, and the philosophical and theoretical stances underpinning the study.

Chapter 5 – Findings

This chapter presents the key findings that emerged from this study's inductive analysis. It is structured around four themes emerging from the inductive data analysis process. These are: building productive work relationships, managing surveillance, managing presence and cultivating belonging. Each theme is described and explained, accompanied by direct quotes from the data. These themes present the participants' accounts of how and in what ways their everyday inter-relational experiences and contextual issues are shaped in physical and non-physical contexts.

Chapter 6 – Discussion

This chapter theorizes the key findings in light of the followership literature reviewed in Chapter 2. It draws upon the concept of Follower-Leader Distance to demonstrate how follower-leader relationships and followership contexts are shaped and reshaped. It particularly explains five dimensions of distance, which are physical, psychological, cultural, functional and structural, and two degrees of distance, which are proximity and detachment. This chapter is structured around four themes, on which is developed a theoretical understanding of the dynamics of follower-leader relationships in two contexts.

Chapter 7 – Conclusion

This chapter has two purposes. One is to track back over what the research objective, research questions and key insights of the study are. Second is to engage in a broader discussion of the theoretical implications and limitations of the study and suggest possible avenues for future research. In so doing, all chapters are brought together and integrated to form a whole.

1.6 Conclusion

In this chapter, I have introduced the academic and personal motivation for studying the topic of followership in both physical and non-physical contexts. I have also addressed two research gaps identified in the followership literature and presented the two research questions that drive this study. Having established the importance of followership in this chapter, it is now much easier for the reader to follow my developing research thread, which delves into how followership has been conceptualized to date, and what potential limitations there are in the next chapter: Literature Review

Chapter 2: Literature Review

2.1 Introduction

This chapter conducts a detailed review of existing literature on followership, illustrating key understandings of the field and establishing the theoretical grounding of this study. To start with, the domain of this review is followership literature rather than leadership literature. As previously explained, the topic of followership has been receiving considerable and growing attention from researchers. There is no doubt that followership and leadership are inextricably linked, and cannot be distinguished clearly; yet, an exclusive review of leadership literature is unable to develop an understanding of follower perspectives, understandings and experiences of followership (Uhl-Bien, 2014). In recent decades, the field of followership has shifted its focus away from aspects of leaders and leadership towards followers and followership (Barker, 2007; Bligh, 2011; Crossman & Crossman, 2011; Kelley, 1998). While there are diverse definitions of followership, scholars are agreed that the primary interest in followership research lies in how followers perceive, evaluate and interact with leaders, instead of considering how followers view their leaders and their behaviours (Carsten et al., 2010; Uhl-Bien & Pillai, 2017; Uhl-Bien, 2014). This paves the way for this study to develop an enhanced understanding of the followership phenomenon.

So far, the followership literature has provided a positive response to traditional leader-centric assumptions and enacted a multitude of ways to rethink followership. However, the literature is problematic, as it is following a similar trajectory to that of traditional leadership research, merely shifting the gaze from leaders and leadership to followers and followership (Collinson, 2006, 2011, 2014; Einola & Alvesson, 2019; Ford & Harding, 2015; Tourish, 2014). Some studies conceptualize followership as an internal and individualistic phenomenon, which can be measured and identified by various follower traits and characteristics, and they assume that the contexts where followership is found do not play a significant role (Bensen et al., 2016; Sy, 2010); in contrast, others describe followership as an external and social phenomenon, directly relating to prescriptive follower role responsibilities (Chaleff, 1995, 2008, Howell & Mendez, 2008; Stech, 2008; Kelley, 1992, 1998, 2008), and they believe that different contextual factors may enable or constrain followers to enact different roles (Carsten et al., 2010; Carsten & Uhl-Bien, 2016). As such, the definitions of followership and followership contexts are often developed in terms of how the concepts relate to leadership (Crossman & Crossman, 2011). Although contemporary leadership research has progressed from a focus on the personal characteristics of leaders and a heroic conceptualization of leadership (North, 2007; Stogdill, 1948), towards distributed and collective aspects, seeing leadership as a social and post-heroic phenomenon (e.g. Bolden, 2011; Gronn, 2002), there remains a danger that followers

and leaders are confined within traditional asymmetry and inequality, downplaying a nuanced appreciation of a complex construct (e.g. Alvesson & Spicer, 2012; Grint, 2005).

This chapter conducts a detailed discussion of two research gaps identified in the followership literature. First, the followership literature overly emphasizes individual traits, characteristics and role obligations, and tends to investigate followers in isolation from leaders and other actors and contexts (Collinson, 2006, 2011; Empson & Alvehus, 2019). This reproduces a binary relationship between followers and leaders. While research has identified different types of good followers and developed multiple effective followership models, more attention needs to be paid to how followers interrelate with different leaders and help them to understand, adopt and even challenge the construction of these traits and roles. Scholars may run the risk of confining followers and leaders to formal positions and structures, with the aim of achieving organizational effectiveness; this still views followers as passive obedient subordinates waiting for leaders' direction and instructions (Collinson, 2011; Ford & Harding, 2015; Tourish, 2014).

The second gap is the inadequate attention paid to the nature of the followership context in general and the role of physical and non-physical contexts in particular. There is a tendency in the current followership literature to discover a list of contextual variables and treat them as independent of any impacts of follower-leader interrelations (Carsten et al., 2010; Carsten & Uhl-Bien, 2016; Kelley, 2008). The hierarchical relationship between followers and leaders provides a setting where followers need to accept fixed elements, such as formal structures, structures and role responsibilities (Uhl-Bien & Carsten, 2016). There is a danger that the micro-foundations of the followership phenomenon and the influence of follower-leader interrelations on the meanings of embedded contexts are overlooked. It does not allow a more holistic and comprehensive understanding, in that although geography, politics, socio-economic issues are not taken for granted, their meanings are constructed in terms of these interrelations that occur every day in particular contexts.

Responding to the two gaps identified in the followership literature, this chapter proposes to develop a more nuanced understanding of the complex nature of followership in terms of follower-leader relationships in physical and non-physical contexts. This argument is structured based on three parts of relevant literature, i.e. followership approaches, followership contexts and follower-leader distance. The first section engages in a critical discussion of four major followership approaches in the literature and explains how they conceptualize follower-leader relationships differently. More importantly, it highlights that a critical approach to studying followership is valuable to enable an understanding of the inter-relational and dynamic aspects of follower-leader relationships, which are under-explored in the other three approaches. In the second section, I acknowledge the importance of articulating the inseparable relationship between followership contexts and follower-leader interrelations and relationships. This is achieved by evaluating the strengths and limitations of the existing followership literature on

conceptualizing followership contexts, especially physical and non-physical contexts. The third section introduces the concept of follower-leader distance, as an explanatory lens to help conduct a fine-grained analysis of both the dynamics of follower-leader distance and the potential of physical and non-physical contexts. In so doing, followership as a complex phenomenon can be fully captured.

2.2 Followership Approaches

The role of the follower-leader relationship in followership is receiving increasing attention in the followership literature. In this section, I conduct a detailed discussion of the salient contributions and limitations of four followership approaches as regards developing a nuanced analysis of the follower-leader relationship. In recent years, the field of followership has shifted its focus in two significant ways. First, there has been a shift in gaze away from viewing followership as an internal and individualistic phenomenon identified by various personal characteristics and traits towards viewing it as a social, interpersonal and inter-relational phenomenon that is shaped in specific contexts (Barker, et al., 2006; Crossman & Crossman, 2011; Cunba et al., 2013; Uhl-Bien, 2014). Second, there has been a shift from considering followers as those with a set of ‘stable’ and ‘durable’ individual traits towards rethinking followers as ‘proactive, self-aware and knowing’ agents capable of developing interdependent relationships with leaders and other actors (Collinson, 2011, p.185). These shifts in focus provide the basis for reconsidering the nature of follower-leader relationships in followership. Especially reflecting the growing debate within critical approaches to studying followership, which calls for developing a dialectical, dynamic and shifting analysis of followership, this study recognizes the importance of conceptualizing the follower-leader relationship as a complex construct.

2.21 Trait-based Followership Approach

The trait-based followership approach describes followership as an internal and individualistic phenomenon that can be scientifically measured and identified by a set of follower traits and characteristics. It is grounded in perspectives of psychological, cognitive, biological and evolutionary traditions, where an individual has a stable ‘cognitive and knowing mind’ and has certain perceptions of the traits and characteristics of others (Bensen et al., 2016; Mohamadzadeh et al., 2015; Sy, 2010). The unit of analysis is the individual and individual variables, which reproduces a viewpoint of follower-leader relationships as something internal, separate and independent from external influences of organizational, social and cultural aspects. This fails to move beyond a narrow viewpoint, leaving followers trapped within traditional asymmetry and inequality arising from the adoption of particular structures and positions.

To start with, the trait-based approach is helpful to challenge a leader-centric assumption in traditional leadership research (e.g. leadership trait theory), which privileges leaders as displaying extraordinary characteristics while downplaying followers as those lacking these positive characteristics (Bass & Bass, 2008). Rather, this approach stresses that followers do not only display negative characteristics, but also positive ones. For example, Sy (2010) lists nine positive attributes (e.g. hardworking, goes above and

beyond, excited, productive) and nine negative attributes (see also Junker and Dick, 2014). This implies that followers can be skilled and effective actors, not just passive and obedient ones. Benson et al. (2016) also identify four positive follower traits (e.g. a collective orientation, active independent thought, relational transparency, an ability to process self-related information accurately). Implicit Followership Theory plays an important role in this approach. The term 'implicit' refers to 'cognitive simplification mechanisms' based on social cognition research and leadership categorization theory (Epitropaki et al., 2013): individuals have a natural and cognitive propensity to classify others and a cognitive mind helps them to explain and predict what important follower characteristics are. Followership can be viewed as the product of cognitive minds, and leaders' and followers' cognitive perceptions are included as sources generating follower traits. Some researchers have accessed leaders from a wide range of industries to explore their perceptions of followers' traits (e.g. Sy, 2013), while others have investigated followers' own cognition of follower traits (Mohamadzadeh et al., 2015).

Considering methodological issues, scholars tend to reduce followership to a one-way causal relation, that is, follower traits as a causal set of factors leads to a certain conception of followership. This is consistent with an ontological position of objectivism and there is a clear separation between object and subject in these studies. Follower traits are viewed as objective truth, which can be discovered through scientific measurement, and this 'truth' exists independently from the external world, including interactions with other actors, organizational and social elements. As such, individual followers appear to be viewed as creators and controllers of the content of followership, they can be distinguished from leaders, entities and contexts in which they are embedded. In this way, this approach appears consistent with traditional leadership studies, such as leadership trait theory, that concentrate on individual traits of leaders and view leaders as capable of understanding, creating and managing their relationships with followers (Judge et al., 2002; Northouse, 2007).

While considering followership from the standpoint of individual follower traits is advantageous to shift the research attention from leaders and leadership to followers and followership, the trait-based followership approach carries the potential risks of developing a narrow understanding of follower-leader relationships in particular, and the very nature of followership in general. As Grint (2005) suggests, leadership and followership are not objective and essential, but are socially constructed. This means that although a follower may have different characteristics from leaders, his or her characteristics may be influenced and changed in ongoing interactions with other actors in particular contexts. It is argued that that even if a person appears to display certain 'compliant' behaviours, it is too simple to conclude that a follower is fully obedient and passive (Collinson, 2006). This can be partly explained, in that the follower may have a 'fear of freedom' as they attempt to shelter in perceived security, such as expressing obedience in order to avoid the threatening responsibility of making decisions (Fromm, 1977; see also Collinson, 2006). It is more valuable to conduct an in-depth analysis of how and why a follower expresses compliant characteristics in

certain circumstances and not simply adopt these characteristics as stable and fixed. As such, the identification of follower traits and characteristics through scientific measurement can explain part of the story about followership and follower-leader relationships. By emphasizing the individualist nature of follower traits, the approach tends to fix the notion of follower-leader relationships in traditional asymmetric structures and positions. Followers appear to be key agents or controllers in the analysis of followership, but they are implicitly placed in subordinate-superior relationships, undermining active or proactive aspects of followers. Therefore, here the point of illustrating these potential limitations of the trait-based followership approach is not to reject it and privilege another approach. Rather, the purpose is to highlight the key assumptions made by this approach, which help us to gain a broader understanding of the very nature of followership and follower-leader relationships.

2.22 Role-based Followership Approach

In recent years, the field of followership has shown some signs of moving towards a more social perspective on follower-leader relationships in particular and the nature of followership in general. Rather than viewing followership as an internal phenomenon, the role-based followership approach has started to consider it as a social and external phenomenon, showing a primary interest in the organizational and social aspects of follower roles (e.g. Cunba et al., 2013; Kellerman, 2008; Lapierre & Carsten, 2014; Riggio et al., 2008; Shamir, 2007). A follower role relates to ‘one’s beliefs regarding the responsibilities, activities, and behaviours that are important to the role of followers, how broadly one perceives the role, and one’s beliefs about what it takes to be effective while working with leaders’ (Uhl-Bien et al., p.15). Based on this, the approach emphasizes the importance of demands, responsibilities, expectations and obligations a follower should consider and enact when he or she takes on a role (Uhl-Bien & Carsten, 2016). This helps to expand our understanding of the social conditions of how a follower-leader relationship arises, but in focusing solely on the ‘stable’ and ‘fixed’ aspects of role responsibilities that followers should adopt can continue to limit a nuanced analysis of the ways in which followers understand, evaluate, adopt and make changes to their relationships with leaders. Consequently, the follower-leader relationship is still confined within the traditional asymmetry and inequality arising from the adoption of certain structures and positions.

To begin with, there are generally three categories of follower roles in this body of literature, namely, passive, active and proactive orientations that represent different levels of follower engagement in organizations. First of all, a passive role orientation views a follower as passive, obedient and deferent to a leader’s orders and instructions without a significant level of judgement (Carsten et al., 2017). Clearly, this role aligns with the viewpoint in traditional leadership research (e.g. transformational and charismatic leadership theories), and it regards followers as recipients fully dependent on their leaders (Shamir, 2007). Kelley (1988, 2008), for example, describes followers as ‘sheep’ and ‘the alienated’ who need leaders to move them forward; the roles

are similar to Kellerman's (2008) idea of 'bystanders' who are disengaged from organizational activities, watch from the side-lines and offer little support. All these passive follower roles make a manager's job challenging and time-consuming, because of their little contribution to and support of organizational goals (Carsten et al., 2017).

Second, an active role orientation portrays a follower as an important partner of a leader. A follower is no longer simply seen as an obedient receiver waiting for orders and direction, but equally important in achieving group and organizational performance. Especially when a follower is able to advance effective leadership (Hollander, 1992), he or she 'can affect leaders actively in more than trivial ways' (Hollander, 1992, p. 31). This means that an active follower can develop collaborative relationships with leaders and peers (Howell & Mendez, 2008), and he or she may prefer leaders who promote collaboration (Maccoby, 2008), and offer suggestions and opinions to leaders (Carsten et al., 2010). Put differently, an active follower can be labelled as 'an interactive follower' (Howell & Mendez, 2008, p. 27).

The third role orientation, a proactive follower role, considers a somewhat higher degree of engagement and discretion. Grant and Ashford (2008) suggest that proactive behaviour is about whether a follower 'anticipates, plans for, and attempts to create a future outcome that has an impact on the self or an environment' (p. 9). The concept of 'courageous follower' is a good illustration of how a follower is future-oriented (Chaloff, 1995). As proposed, this type of follower should learn how to challenge leaders' opinions, how to combat groupthink, and how to advance institutional integrity. It is also claimed that these skills and abilities are closely associated with how a follower can stand in 'a better position' to see day-to-day events that may have negative consequences for organizations (Chaloff, 2008, p. 14). Other scholars argue that such kinds of followers may lead to dysfunctional resistance, because they may pretend they did not hear or find excuses not to complete requests, as they increase their awareness of their situations (Tepper et al., 2001). In Rost's (1993) view, when followers exert considerable influence on leaders by employing resources to challenge others' positions, such followers potentially 'do leadership not followership' (p. 112).

Despite the diversity of follower roles, the role-based followership approach is problematic in seeking to align with an 'effective followership paradigm' (Collinson, 2011, p. 184). That is, it implicitly conveys a generic expectation that followership will lead to group or organizational goal accomplishment. Most studies simply label active or proactive followers as 'effective', 'ideal' or 'good', while they view passive followers as 'ineffective' and 'bad' (e.g. Chaloff, 1995, 2008; Kelley, 1998, 2008). Furthermore, most studies are conceptual papers without empirical analysis (e.g. Riggio et al., 2008), while only a few articles interviewed followers and leaders' opinions on follower role orientations (Carsten et al., 2010; Carsten et al., 2017). This means that a majority of studies state follower roles a priori, without investigation of particular situations and cases through which to see how follower roles are created and enacted.

Carsten et al. (2010) appear to provide an alternative understanding of follower roles, as these researchers conducted 31 qualitative interviews with subordinates to elicit their perspectives on being in a follower role. It is reasonable to assume that follower roles are not predetermined but shaped in their interactions with leaders in actual workplaces. But these follower roles are obviously associated with the idea of ‘followership schema’, these are ‘generalized knowledge structures, which are believed to develop over time through socialization and interaction’ (Carsten et al., p. 546). In holding onto this idea tightly, researchers may conceptualize followers as those who are interested in and willing to be influenced by leaders in terms of existing positions, values, knowledge and other elements within their relation. Followership and follower-leader relationships, in this view, entail the acceptance of formal influences to a considerable degree.

As Ford and Harding (2015) note, many followership researchers implicitly place these participants within ‘an identity category or subject position that limits what they can do or say; they have to constitute themselves as followers to conform with the requirements of the research study’ (p. 7). I suggest that this framing of follower roles has some resonance with a functionalist view of these roles by early sociologists: a role is ‘a particular set of norms’ (Bates & Harvey, 1975, p. 106), ‘a set of expectations in the sense that it is what one should do’ (Merton, 1957, p. 95) or a ‘comprehensive pattern for behaviour and attitudes’ (Turner, 1979, p. 124). That is, a follower role, to a large extent, is recognized as durable and stable. However, the danger of articulating this viewpoint is that it undervalues the interplay between a seemingly predictable and fixed order and the creative actions of followers. As Collinson (2005b) argues, followers are knowledgeable and discernible agents, so that they retain the capability of understanding and evaluating these role responsibilities and making decisions about how to enact and even change them in terms of different circumstances and contexts. There should be more analytic room left for the inter-relations between followers and leaders, which may produce new insights into follower-leader relationships. Otherwise, follower-leader relationships, according to this role-based followership approach, tend to remain confined within traditional unequal relationships between two parties, with an implicit managerial focus on followers’ contributions to organizational performance (Collinson, 2011).

To move away from this tendency, Blom and Lundgren (2019) develop a more sophisticated followership model that presents different degrees of followership voluntarily, ranging from minimally voluntary followership, moderately voluntary followership, to fully voluntary followership. They highlight that voluntariness does not describe personal attitudes or behaviours a priori but is closely associated with ‘choice’ (p. 168), whereby a follower can recognize certain threats and identify foreseeable consequences and decide to offer a degree of obedience and compliance. With some resonance with Collinson’s (2006) idea of different degrees of compliance, this research further reinforces my viewpoint, above, that so-called follower roles cannot simply be assumed to be self-evident or pre-determined, but rather shaped and reshaped in their interactions and interrelations through which the meanings of follower roles are articulated.

2.23 Post-heroic Followership Approach

The post-heroic followership approach attempts to address relational, processual and interpersonal aspects of the follower-leader relationship in particular and followership in general (Agho, 2009; Alcorn, 1992; Cunha et al., 2013; DeRue & Ashford, 2010; Russell, 2003; Stech, 2008). Followership can be then considered as an influential process whereby followers and leaders interpret values, motivations, emotions and knowledge of each other, co-constructing 'authentic' following relationships (Townsend & Gebhart, 1997, p. 343). Two bodies of literature are critically reviewed here, relational leadership studies and post-heroic followership studies, and the former significantly influenced the development of the latter. Both of them challenge static and passive thinking in trait-based and role-based followership approaches and reflect a sensibility to 'relational dynamics between followers and leaders' (Barker, 2007, p. 56; see also Kellerman, 2007, 2008). However, while an alternative to the prevailing perspective has been advanced, this approach is limited to analyse and articulate the complex influence of the underlying traditional asymmetric positions on follower-leader relationships. In continuing to follow a similar trajectory to traditional leadership research, it potentially perpetuates a superficial analysis of the relationship, reinforcing the formal asymmetry between followers and leaders (Collinson, 2011).

The first body of literature on relational leadership draws our attention to 'relationships' in which followers and leaders are viewed as 'interdependent and inter-subjective' (Bradbury & Lichtenstein, 2000, p.552). My study of follower-leader relationship can benefit from relational leadership in terms of its critique of traditional leader-based research that places the primary focus on individual aspects of leader and leadership. As Cunliffe & Eriksen (2011) emphasise, relationships are 'living embedded and between people' through which we can capture emerging dialogue, conversations and voices expressing diverse meanings of leadership (p. 1431). In contrast to a more conventional trait and role orientation, which considers followership from either the internal or external standpoint as independent, such a relational perspective opens up a new way of thinking the complex nature of followership. Two relational orientations provide different descriptions of leadership relationships, which give this study clues to understand the 'relational' nature of followership.

The first traditional orientation, an entity perspective, regards leaders, followers and relationships as three separate domains and individuals are treated as 'architect and controller of an internal and external order' (Uhl-Bien, 2006, p. 655). For example, Graen and Uhl-Bien' (1995) model of Leader-Member Exchange highlights the quality of the exchange relationship that a leader maintains with followers: a low-quality relationship was described as transactional, which represents economic exchange, while a high-quality relationship was depicted as having mutual liking, respect and high trust, which is close to social exchange (Bernerth et al, 2007). While the dyadic relationships can be extended to a group and network level (Graen & Uhl-Bien, 1995), the relationships are treated as less important than individual aspects that followers and leaders bring to their exchanges (Uhl-Bien, 2006). Individual perceptions, intentions, understandings, personalities and behaviors are concerned as important basis of a relationship.

In particular, Hosking (1998) argues that this viewpoint expresses a physicalist approach to leadership, by privileging the leader person over the leadership process. Without a serious concern of the underlying socially constructed aspects of processes, LMX studies tend to 'rely only on (quantified) responses from subordinates, often leading to one dimensional and static characterisations of relations in terms of high or low LMX' (Einola & Alvesson, 2019, p. 4). That is, a leadership relationship is merely a product of connection between existing individuals who want to deal with each other (Uhl-Bien, 2006, p. 656).

In contrast to this entity perspective, a relational perspective can offer valuable insights into the dynamic and constructed nature of follower-leader relationships (Cunliffe & Eriksen, 2011; Hosking, 2011; Uhl-Bien, 2006). According to Bradbury and Lichtenstein (2000), seeing leadership relationships as 'interdependent' means that actors have reciprocal effects and mutually influence each other; seeing relationships as 'inter-subjective' means that meanings occur between two individuals or subjects, rather than produced from discrete individuals' minds (p. 2000). The key element here is that leadership and followership relationships cannot be characterised as static and durable in terms of hierarchical structures and positions, but as productive and multiple, depending on 'a shared process focusing more on the collective capacity of people to accomplish their work together' (Raelin, 2011, p. 200). In some versions of relational leadership, a process ontology of becoming is acknowledged to stress an 'internal relation', i.e. a lived and contextualised experience of continuous inter-relations with each other (Wood & Dibben, 2015). As they suggest, 'we cannot give a specific position or role directly to a distinct and self-contained figure in advance. Leaders have no essence or substance beyond exhibiting those characteristics that cause us to see, feel, and think about them in a particular occasion of experience' (p. 29). Such processes are not mechanically controllable but are characterised by a deep flow of interacting and connecting whereby individuals are always under construction and reconstruction (Chia, 1995; Crevani, 2010).

However, this body of relational leadership research is increasingly critiqued for building theory and conceptual underpinnings for the 'leadership' construct and limiting the extent to which the role of follower agency can be addressed. We share its critical stance towards the leader-centric and heroic assumption in conventional leadership studies that tends to equate leadership with formal positions or titles, but this does not necessarily entail taking a 'radically decentred' approach that over-emphasises the uniqueness and freshness of every interrelation and conversation process (Shamir, 2012). Because 'most of our relationships are characterised by regularities and patterns that evolve only slowly and tend to remain relatively stable across interactions and conversations' (p. 481-482). Focusing too much on the unique aspects of relational processes brings the danger of eradicating the distinction between followership and leadership, and a follower and a leader (Einola & Alvesson, 2019). In this way, there emerges an assumption of 'convergence' that group members are believed to

agree on certain meanings, values and perspectives and overlooks the possibilities of divergence in interests and understandings (Alvesson, 2019). While frequent expressions, dialogue and other inter-relational activities are involved in shaping relational aspects of leadership, what leadership scholars tend to foreground is bringing diverse perceptions and purposes ‘into an organic unity’ (Wood & Dibben, 2015) This is also argued by Collinson (2017), who notes relational and collective senses of leadership focus exclusively on ‘expressive leadering’, that is, ‘the collective of individuals become the unit of leadership agency to such an extent that the category of “follower” becomes redundant’ (p. 1637).

Therefore, I share the view of relational leadership that followership, to a considerable extent, is a relational and socially constructed phenomenon. Yet I also accept the ongoing critique that followership and leadership are not entirely shared but involve significant variation and fragmentation in how individuals understand, evaluate and construct elements in their interrelations. I argue that much potential for followership relationships lies in exploring the ways people interrelate with each other, but ultimately this interrelation must be captured in recognition of ‘at least a degree of asymmetrical or unequal relationality, reflecting external social orders and other hierarchy creating drivers’ (Einola & Alvesson, 2019, p. 15). In this way, followership should be understood as ‘a complex set of construction processes, sometimes coalescing, sometimes diverging, and leading to ambiguity and confusion or divergence of meanings around the goals, means and relations typically characterising a leadership process’ (Alvesson & Sveningsson, 2012, p. 483).

In the remaining part of this section, I move to critically discuss a small but emerging body of followership research based on a post-heroic perspective. The research learns the key insights of relational and processual leadership research and applies to followership research by suggesting a relational ontology of the phenomena. DeRue and Ashford’s (2010) claiming-granting framework is a typical example. They propose a constructionist view, holding that leadership and followership are co-constructed in an interactive process. Followership occurs ‘when a person might claim a follower identity by choosing to speak in a meeting only when called on; at the same time, another person might grant followership by not including the first person in an important (direction-setting conversation)’ (p. 632). The first person’s follower identity is established in that particular context while, simultaneously, the second person’s leader identity is also reciprocally constituted. My focus is not on identity issues, but on their potential for adding new thinking about the dynamic aspects of follower-leader relationships. In their respective viewpoints, followers and leaders do not fully equate with subordinate and superior positioning, but rather engage in ‘a dynamic exchange’ in which they constantly negotiate with each other (p. 635). This resonates with Stech (2008), who delineates three approaches to studying followership: the first is to focus on individual aspects; the second is to study follower-leader positions, emphasizing the formal and hierarchical aspects of followership; the third is to emphasize follower-leader states or conditions, which is very much in line with

DeRue and Ashford's (2010) call for paying more attention to the interpersonal or exchangeable aspects of followership. It echoes the idea that follower-leader relationships encompass 'enthusiasm, cooperation, effort, active participation, task competence and critical thinking' (Howell & Costley, 2006, p. 298). Distinct from passive and static thinking in trait-based and role-based approaches, these scholars suggest that followers take a more active role in establishing and developing their relationships with leaders and other actors.

Cunha et al. (2013) propose another post-heroic framework for conceptualizing followership, seeing followers and leaders as 'relational categories rather than absolutes' and their features 'in relation' (p. 88). They offer three levels of follower relations with others: followers with selves, with others and with organizations. The first level, being relational to selves, acts in accordance with 'self-awareness' (p. 90), 'self-management' (p. 90) and 'self-criticism' (p. 91). This means that followers can choose whether to follow or not, and choose to influence themselves or not. The second level, being relational to others, focuses on their capacity to build and maintain constructive relationships with leaders and peers. Interestingly, they have started to consider the role of peers in helping to fulfil positive organizational objectives, which is under-developed in the prior followership literature. The third level, being relational to organizations, recognizes that followers are 'organizational citizens' performing extra-role behaviours to improve organizational functions (p. 92). Howell and Mendez (2008) suggest a similar framework for followership by categorizing three primary antecedents of follower-leader relationships, which are follower self-concept, leader expectations and organizational factors. One important implication of the interpersonal nature of followership in two models is that they consider followership based on multiple types of interpersonal exchanges with multiple actors, and give space to developing local meanings of followership that capture diverse follower-leader relationships. Follower-leader relationships, in this sense, are not merely the product of followers' interrelations with leaders, but also with peers and other relevant actors, whose understandings and behaviours may influence followers to make sense of and develop their relationships with leaders.

However, I argue that the second body of literature has a similar problem with the first part of relational leadership research. Despite adopting a distinct followership focus, the studies do not explicitly rethink and challenge existing asymmetric or unequal relations between individuals. For example, the claiming-granting process in DeRue and Ashford's (2010) model is still linked to different formal positions whereby people claim and grant identities in terms of a clear sense of differences in status, knowledge and power (Blom & Lundgren, 2019). What scholars have failed to answer is in which ways followers interrelate with leaders to reinforce existing unequal relationships or develop new ones, which may reveal a certain level of simultaneous obedience and resistance (Learmonth & Morrell, 2016). Consequently, this approach, similar to the previous two approaches, tends to confine follower-leader relationships within

formal asymmetry, and to treat followers as passive and obedient subordinates waiting for orders and direction from leaders as superiors.

Part of the reason for the unchallengeable assumption of formal asymmetry lies in the adoption of an objective truth. As described above, individual followers and leaders are thought of as independent entities, which possess the capability to interact with others; while there is assumed to be a two-way influence relationship between a follower and a leader, they aim primarily at fulfilling mutual and shared objectives for organizational effectiveness. As such, interpersonal relationships, including follower-leader relationships, follower-peer relationships and even follower-group relationships, for example in Cunha et al.'s (2013) model, are types of simple connections between discrete entities. Such an understanding of the interpersonal nature of relationships does not move beyond the stable and durable basis derived from formal structures and positions, but rather reinforces the traditional asymmetric relationships between followers and leaders. In consequence, follower-leader relationships are described as overly harmonious, positive and coherent to a large extent, lacking concern for conflicts, negotiations and struggles (Einola & Alvesson, 2019).

I have, in the previous two subsections, addressed how follower-leader relationships are more than a pure subordinate-manager relation, but rather encompass more dynamics, uncertainties and complexities arising from their interrelations with each other in particular contexts. I do not deny that there is 'at least a degree of asymmetrical or unequal relationality, reflecting external social orders and other hierarchy creating drivers' (Einola & Alvesson, 2019, p. 15), but I want to highlight that this so-called structure may be 'dynamic and multifaceted and thus ever-evolving through dialectical interactions' (Raelin, 2014, p. 135). Therefore, despite these efforts to promote the inter-relational aspects of followership, the post-heroic followership approach is still far from developing a more sophisticated understanding of follower-leader relationships. To move beyond the perspectives of the three followership approaches, the next subsection will suggest a critical approach to studying followership, which conveys a deeper understanding of the dynamic and multifaceted nature of follower-leader relationships.

2.24 Critical Approach to Studying Followership

This subsection introduces a critical approach to studying followership, which is particularly useful to convey an enhanced understanding of the multifaceted, dynamic, shifting and uncertain nature of follower-leader relationships (Collinson, 2006, 2011, 2014, 2017b; Schedlitzki & Edwards, 2014; Tourish, 2014). The approach is well informed by critical leadership studies but adopts a followership focus instead. Critical leadership studies place particular emphasis on 'leadership dynamics' and view the construct of leadership as a fundamental basis (Collinson, 2011, p. 182; see also Alvesson & Spicer, 2012; Carroll & Nicholson, 2014; Tourish, 2013), so this body of studies makes a clear distinction from critical management research, which privileges relationships between managers and employees (Adler et al., 2007; Alvesson, 2009). More importantly, critical leadership studies question the prevailing view in the leadership literature that leader-follower relationships are largely characterized by formal hierarchies, and encourage a new concern for multifaceted, unpredictable and uncertain relationships arising from specific cultural, social and economic contexts (e.g. Ford, 2010; Grint, 1997, 2005; Tourish, 2013, 2014). This provides an important basis for a reconsideration of the very complex nature of followership in general and the follower-leader relationship in particular.

In considering how to extend the understanding of follower-leader relationship in this followership study, it is helpful to first acknowledge the new emphasis of the critical approach on studying followership. To begin with, the critical approach to studying followership has a new research focus on interrelated dialectics between followers and leaders. Dialectics, in Baxter and Montgomery's (1996) viewpoint, refers to a 'dynamic knot of contradictions, a ceaseless interplay between contrary or opposing tendencies' (p. 3). Two points are underlined here. First, each oppositional party assumes the existence of the other. The concept of a follower is only meaningful in relation to the role of a leader. That is to say, a follower cannot be understood in isolation. Second, the two seemingly oppositional parties are interactively unified as interdependent (Baxter & Montgomery, 1996). For instance, follower and leader negate one another by resistance and control, dissent and consent; at the same time, they are interdependent and mutually influence each other, and even leaders remain dependent on followers (Collinson, 2005a; Fairhurst, 2001). Accordingly, followership exists in interdependent or inter-relational relationships from which arise inter-subjective meanings (Einola & Alvesson, 2019). The meanings of follower-leader relationships can never be finalized at internal or external social levels, nor have they any ultimate origin in mutual agreement. Rather, relationships always exist as deeper connections or interrelations between individuals, producing and reproducing 'conflicts, tensions, paradoxes and contradictions' that are typically under-explored in trait-based, role-based and post-heroic approaches to studying followership (Collinson, 2020, p. 13).

Based on this, I wish to make a distinction between the focus on interpersonal exchange in the follower-leader relationship from a post-heroic approach to studying followership and the inter-relational aspects of relationships from critical approaches to studying followership. As already discussed in the previous subsection, the former approach assumes an objective reality between individuals, that is, a positive and harmonized version of followership. It is consistent with the entity perspective developed in post-heroic leadership research that sees leaders and followers as the ‘architect and controller of an internal and external order’ and their behaviours, and these perceptions and expectations allow researchers to make sense of and understand how leadership really works (Uhl-Bien, 2006, p. 655). In contrast, the latter approach recognizes that followership exists more in inter-relational and interdependent relationships. It does not focus on identifying the attributes of followers and leaders involved in interpersonal exchanges, but rather on how followers and leaders, followers and contexts are actually interrelated. Given the limited amount of work exploring followership from a critical perspective, in the following I review two typical studies to better illuminate in what ways follower-leader relationships can be conceptualized.

The first typical work is from Collinson’s (2006, 2017, 2020) research on the complex nature of follower-leader relationships. Foucault’s (1977, 1979) theories on the concept of power play an important role in shaping his ideas: power is not just a negative and repressive object exercised in a top-down fashion, but also a positive, creative and productive force, produced and reproduced in everyday interactions and negotiations. This means that the very nature of power is about ‘struggle’, through which a body is able to ‘fix meaning and articulate it to its own interest’ (Munby, 2001, p. 601). When power is constructed in daily interrelations and mobilized for certain actions, it is the reflection of a deeper relation that is always fluid, uncertain and shifting (Clegg et al., 2006). Accordingly, Collinson (2006, 2017, 2020) suggests that follower-leader relationships and leader-follower relationships should not simply be understood in a fixed hierarchical form, where followers are conceived as those having less power and influence than their leaders; rather, relationships are inherently more dynamic and embody many different contradictory meanings, including not just follower compliance, consensus and the promotion of organizational effectiveness, but also dissent, resistance and alternative viewpoints, deeply embedded in particular temporal, organizational, cultural and social contexts (see also Tourish, 2014).

This provides fresh insights into our understanding of the follower-leader relationship in this study. Given that the basic unit of analysis in followership becomes inter-relational aspects instead of traits, roles and interpersonal exchanges, this challenges the simplistic and reductionist viewpoints in the dominant followership studies. Even if a follower meets ‘a superior, hardworking and respectful leader’ and he or she expresses a certain degree of obedience, that is not to say that the follower’s relationship with his or her leader is already frozen within formal asymmetry; instead, there is ongoing production and reproduction of multiple relationships constructed in their interrelations (Einola & Alvesson, 2019, p. 16). So-called ‘good’ or ‘effective’ followers are those individuals whose dissent and alternative viewpoints are absent from

models of effective followership with a managerial focus on followers' contributions to organizational performance (Tourish, 2014). Thus, the core of the critical approach to studying followership is to appreciate the inherently diverse, situated and multifaceted nature of follower-leader relationship and avoid conducting a superficial analysis of how much followers agree with the instructions and opinions of their leaders.

Another study based on the critical approach to studying followership is Schedlitzki and Edwards' (2014) empirical research. Distinct from Collinson's work primarily based on Foucault's power theories, this research draws upon Lacan's ideas to conceptualize the 'absent' relationships between followers and leaders. This helps this study to raise our awareness of the dynamic and unpredictable nature of relationships between followers and leaders. They argue that 'although organizations may place a subject in the implied position of the follower due to their structurally imposed relationship with another subject labelled leader, this subject cannot identify his/herself as a follower as such images are missing from the Symbolic Order' (p. 487). In Lacan's (1977, 1998) sense, any attempt to construct a durable and fixed follower image is impossible and will fail, because there is always a gap in the Symbolic Order that hinders a coherent understanding of relationships, although followers desire to have their existence confirmed by certain relations. At this point, there is an inherent dynamic involved in the articulation of follower-leader relationships. The notion of a lack disrupts the harmonized and positive meanings of relationships at the symbolic level and reopens the possibility for us to explore the unstable, fragmented and changing potential of follower-leader relationships (Schedlitzki & Edwards, 2014). Driver (2013) talks about the power of lack, saying it results in the 'creative struggles' of followers and leaders who are inspired to seek what they want but always fail (p. 418). Thus, from the critical perspective developed here, this work supports the exciting idea that followership can be understood only in follower-leader relationships, which are always moving, constructing and shaping unpredictable and complex meanings for followers and leaders.

So far, I have reviewed the strength of the critical approach to studying followership to advance our understanding of followership. The follower-leader relationship is a fundamental underlying issue, but there are different perspectives of it. Trait-based and role-based followership approaches emphasize the internal and external elements of the relationship. They help to shift the gaze from leadership and leaders to followership and followers, but they fail to develop a nuanced analysis of how follower traits and role responsibilities are constructed during inter-relational experiences. The post-heroic followership approach concentrates on interpersonal aspects of the relationship, which invite us to appreciate followers' interactions with multiple actors, including leaders and peers. However, limitations lie in the reproduction of the hierarchical relationship between followers and leaders and repetition of the mistakes made by mainstream leadership research. In contrast, the critical approach to studying followership calls for developing a more nuanced analysis of the diverse, multifaceted and tense nature of follower-leader relationships, thus paving the way for an appreciation of the very nature of followership in general. In

particular by locating followers in different contexts, where they experience different resources, opportunities and constraints of inter-relating to their leaders, the follower-leader relationship and followership can become more multiple, diverse and uncertain. Relatedly, there is an increasing need to articulate good awareness of the nature and potential of contexts where followership occurs, but there are few empirical studies that adequately explore this issue. For this study, informed by the critical approach to studying followership, it is impossible to discuss follower-leader relationships in isolation from the context in which they are perceived. The next section moves on to discuss the second aspect of followership complexity, followership context, with the aim of establishing a sophisticated viewpoint of the inseparable relation between followership and followership contexts.

2.2 Followership Context

The role of context where followership and follower-leader relationships occur is receiving growing attention in the followership literature. In this section, I conduct a detailed discussion of the salient contributions and limitations of the literature, in order to develop a fine-grained analysis of the nature of the followership context in general and the potential of physical and non-physical contexts in particular. Exploring contexts where followership occurs is particularly valuable and necessary in this study for two reasons. First, the critical approach to studying followership clearly advises us to develop more accounts of followership in diverse organizational, cultural and social contexts in which follower-leader relationships are typically located and shaped (Collinson, 2011, 2017). Recent years have witnessed two focus shifts in the field of followership: one is from the individual and internal aspects of follower-leader relationships vis-à-vis social and inter-relational aspects (Cunha et al., 2013; Schedlitzki & Edwards, 2014; Stech, 2008); the other is moving away from viewing a follower as a passive individual with a set of ‘stable’ traits, characteristics and roles, towards a knowledgeable and proactive person capable of developing relations with others. The two movements are key to developing a nuanced understanding of the nature of the followership context, which is no longer reduced to a simple setting measured and identified by independent variables or factors, but an integrated part of followership, arising from follower-leader interrelations. While the existing followership literature has started to consider different types of followership contexts and their effects on the ways in which followers think and act, the key limitation of existing works is the reproduction of a clear line between followership contexts and follower-leader interrelations. Hence, developing an enhanced understanding of the followership context is important to embrace a broader and more dynamic viewpoint of follower-leader relationships in particular and followership in general.

Moreover, exploring physical and non-physical contexts helps to capture the new phenomenon in contemporary organizations where followers do not just work with leaders in a physical workplace, but also collaborate with remote leaders across locations via communication tools. Located in both physical and non-physical contexts, followers need to cope with newly emerging opportunities and challenges, which are under-developed in the existing followership literature. This study holds that it is very important to consider the ways in which followers interrelate with different leaders in two different contexts and shape the meanings of their embedded contexts, as this helps to unpack the inseparable relation between the two contexts and follower-leader interrelations in particular, as well as the complexities of followership in general. In the first half of the section, I conduct a critical discussion of three types of followership contexts, i.e. hierarchical, distributed and network contexts. I also encourage moving beyond such narrow conceptualizations of followership contexts by reviewing the literature on the leadership context from a critical leadership perspective. This helps to address and develop a more dynamic understanding of the nature of the followership context. In the second half of this section, I concentrate on discussing what

distinct opportunities and challenges followers may experience and deal with in the two contexts.

2.31 Three Types of Followership Contexts

When considering the followership context, most followership studies do not formally define the concept itself or the contexts in which individuals may develop as followers and build follower-leader relationships with leaders (Bligh, 2011; Uhl-Bien, 2014). For example, papers taking a trait-based followership approach have an exclusive focus on follower traits and characteristics and lack a clear explanation of the contexts in which followers are situated. A major reason is that taking a viewpoint on followership as an internal and individual phenomenon implicitly describes context as playing a minor role or no role at all. This way of thinking about the followership context tends to define it as a setting or condition independent of follower-leader relations. This view is most often adopted in the followership literature, especially works based on a role-based followership approach, which describes various types of contexts in which followership occurs in terms of different opportunities and constraints followers may need to address. This study argues for the importance of viewing followership in a more nuanced sense and appreciating its constructed nature and meanings for followers and leaders. Thus, here I understand the followership context as a setting whose meanings, including opportunities and challenges, are constructed and reconstructed through follower-leader interrelations, which in turn enable or constrain followers to act and influence follower-leader relationships to occur. In the following, I review three types of followership contexts, which are commonly introduced in the followership literature, and also evaluate the strengths and drawbacks of work developing an in-depth viewpoint of the nature of the followership context.

Hierarchical followership context

According to Uhl-Bien and Carsten (2016), a hierarchical context ‘does not allow much flexibility’ for a follower who may strongly believe that ‘a manager’s decision or directive should be followed and obeyed’ (p. 145). Managers are assumed to carry more responsibilities in exercising influence over followers, while followers merely need to fulfil their roles and obligations. In their viewpoint, this hierarchical context produces passive followers, and active and proactive followers may feel very confined and challenged, as their behaviours do not ‘match the hierarchical situations’ (p. 144, see also Carsten et al., 2010). Kelley (2008) supports this idea, calling for attention to the cultural level of hierarchy. Followers experience their contexts differently when they are situated in Japan and in the United States, where different ethnic identity and religious beliefs affect follower thinking and acts (Kelley, 2008). Japanese culture emphasizes status differences in organizations and subordinates who are part of this culture can be influenced by hierarchical authority and inclined to voluntarily accept orders and instructions from their superiors; in contrast, people from a democratic culture may tend to act more independently and discretionally (House et al., 2004).

However, I argue that these studies are far from providing a fine-grained analysis of the followership hierarchical context. They fail to articulate how followers experience, understand and even make small changes to so-called hierarchical contexts, so that we are uncertain whether followers may become fully obedient under such a hierarchical culture. Their viewpoints have some resonance with ideas of traditional leadership theories (e.g. leadership style theory), which suggest that leadership styles vary at different hierarchical levels (Oshagbemi & Gill, 2004). In a senior-level context, managers use delegative styles, while in lower-level contexts managers use more directive styles (Oshagbemi & Gill, 2004). There remains an assumption that hierarchical contexts are stable and durable settings with a set of contextual factors ready for followers. But this body of literature on followership hierarchical contexts repeats the mistake, merely shifting from a research focus. Scholars here understand this hierarchical context from a followership perspective and regard the leadership hierarchy as background information, while the latter treats leadership as a central issue. What they do not radically challenge is the clear division between contextual factors and followers.

Distributed followership context

The same perspective of a clear division between context and followership is also apparent in the notion of a distributed context. A distributed context is thought of as a particular setting that does not provide hierarchical structures but imposed asymmetric relations over followers, offering opportunities for followers to actively interact with their leaders (Uhl-Bien & Carsten, 2016). But by virtue of the relationship between a follower and a leader, this will be asymmetric and equal. When leadership styles are changed from ‘authoritarian’ to ‘empowering’, followers may experience fewer constraints on their discretion (Carsten et al., 2010, p. 554). This means that when we turn the attention from leadership to followership, from leadership context to followership context, we should consider that the leadership context becomes an important background for followers (Kelley, 2008). This distributed background includes leadership elements, such as new forms of ‘leader perceptions and constructions’ (e.g. perceived follower support, satisfaction with followers) and a ‘leader affect’ (positive and negative state and trait effects) (Uhl-Bien, 2014, p. 97).

In addition, ‘task requirements’ and ‘mentoring programs’ are also important factors in a distributed context (Howell & Mendez, 2008). When facing tasks with a high degree of complexity, followers may not only seek collaboration from leaders, but also look for support and feedback (Chaleff, 2008; Stech, 2008). At this point, peer support is concerned as it is an important contextual factor and peers may help followers to build relational networks with leaders (Cunha et al., 2013). In the meantime, it is suggested that peer pressure can be perceived as a potential challenge by followers themselves, and they may be induced by ‘team expectations’ to work harder to fulfil organizational performance (Howell & Mendez, 2008, p. 37). As such, peer interrelation is a double-edged sword, as it may facilitate followers developing positive relationships with leaders; at the same time, it may enable them to recognize challenges and threats arising

from their peers, thus hindering the development of positive relationships with their leaders. Peer interrelations, as articulated in the post-heroic approach to studying followership, are a vital element in a distributed context where followership may occur.

In a contrast to the notion of a hierarchical context where followers have very limited room for autonomy, a distributed followership context appears to offer more liberating opportunities for followers to act. However, the scholars mentioned above are silent about the extent and ways in which ways followers can actively interact with leaders and peers and construct multiple relationships with them. What is common with the notion of hierarchical context is the adoption of a division between followership context and follower-leader interrelations. This body of studies provides evidence that followership research has followed the same trajectory as post-heroic leadership theories, such as distributed leadership and collective leadership, which has perhaps stymied developments in followership research. Consequently, there is no distinction between the followership and leadership contexts, as the body of followership research simply extends existing leadership research into this domain, by changing some elements of distributed leadership as the followership background for followers to think and act.

I argue that the meanings of a distributed context from a followership perspective are different from those from a leadership perspective. In shifting the investigation focus from leaders to followers to study the followership context, a critical consideration must be how followers experience and act in relation to leaders, how they make use of contextual resources, and how they cope with threats. This means that we should not directly use contextual elements identified in the leadership research. Opportunities and challenges in a followership context are unique and distinct, as they are shaped and reshaped in situated contexts where followers and leaders actually interact with each other (Uhl-Bien et al., 2014).

Network followership context

A network context has the same problem of a clear division between context and followership. The context emerges from 'technological advancements that enable individuals to self-organize around common needs and interests' (Uhl-Bien & Carsten, 2016, p. 150). Different from the previous two types of followership contexts, this network context suggests a possibility that followers who work in an online setting have expertise and knowledge to contribute to multiple projects and make decisions they want. From their viewpoint, there are no clear formal structures and roles determining their responsibilities and obligations (Carsten & Uhl-Bien, 2016).

I suggest that this network context has some overlaps with the physical and non-physical contexts that I will discuss later, which acknowledge the possibility that followers can access new resources and opportunities when they do not necessarily have face-to-face contact with leaders. However, knowledge of the network context is still very limited to explore in which ways followers actively and proactively make the context free of control and structure. This means that an overemphasis on follower autonomy and independence does not necessarily lead to an advanced understanding of followership, because in most situations there is still a degree of asymmetric relations from formal structures and positions, separating followers and leaders into two groups (Einola & Alvesson, 2019), based on a critical followership approach. I argue that this body of work may downplay the roles of control, power and dominance in the network context, in order to highlight the liberating agency that followers might have. Consequently, this continues to reinforce a clear division between the followership context and follower-leader interrelations, which needs further exploration.

In the following I draw from critical leadership studies to develop an advanced viewpoint of the relationship between the followership context and follower-leader interrelations. Two important insights are involved. First, the leadership context and leadership are interdependent. Grint (2005) argues that traditional leadership theories, such as contingency theory, undervalue ‘the extent to which the context or situation is actively constituted by the leader, leaders, and/or decision-makers’ (p. 1471). He further suggests that leadership researchers should pay more attention to the ‘social construction of the context that both legitimates a particular form of action and constitutes the world in the process’ (p. 1472). As such, it challenges the prevailing view that there is a definitional list of contextual variables that influence effective leadership and followership behaviours (Schedlitzki & Edwards, 2014). Complex dynamics is a key aspect of context influencing how followership occurs. For example, in Endrissat and Arx’s (2013) empirical work, they explain that leadership context and leadership practices shape and reproduce each other: based on practices, leaders and followers create the reality as the context through which practices are in turn influenced by the context. That is, practices become the context to which leaders and followers need to respond. For example, they point out that there are discussions and negotiations about certain strategic decisions, which do not just produce a particular context where open conflicts are adhering to existing norms, but also shape a context revealing contradictory opinions and viewpoints (Endrissat & Arx, 2013); these contextual elements in turn can serve as opportunities and challenges for followers and leaders to think and act.

According to this first insight, I suggest that the context in which followership occurs cannot be independently identified and measured by variables; rather, it should be viewed as an integral part of followership and its complexity. It is the interrelations between followers and leaders that create and shape multiple meanings of situated contexts; in turn, contexts displaying emerging opportunities and challenges that followers and leaders need to respond to. In this way, working with a critical perspective is helpful in challenging the foregoing definitions of followership context, in that contextual elements are taken for granted, and achieving a better appreciation of the relation between followership complexity and context.

The second insight from critical leadership studies is about the contested nature of the followership context. According to Gagnon and Collinson (2014), leader-follower interrelations do not just reflect regulatory structures and positions around them, but also shape and reveal resistance and dissent that may be contrary to overall leadership objectives. Context and power are intertwined, because power ‘allows room for individual agency yet shapes what is most likely to be successful; it both shapes and is shaped by individual actors’ (Bolden et al., 2011, p. 97). This means that what we see as a relevant or important followership or leadership context is deeply embedded within asymmetric power negotiations (Schedlitki & Edwards, 2014). Accordingly, it is appropriate to view the followership context as a contested construct, where followers and leaders interrelate and produce contradictory meanings of their situated contexts. In this way of thinking, critical leadership studies on leadership context can provide new insights into the complex nature of the followership context and highlight implications for my understanding of physical and non-physical contexts where followership and follower-leader relationships occur.

2.32 Towards Physical and Non-physical Contexts

This subsection addresses the potential of physical and non-physical contexts and explains what distinct opportunities and challenges followers need to respond to and deal with. Informed by the critical approach to studying followership that looks deeply at follower-leader relationships in situated contexts, a detailed discussion of the constructed nature of the two contexts, and the particular meanings for follower-leader relationships, is helpful to boost our understanding of followership complexity. I have defined a physical context as a setting where followers have face-to-face interactions with others, while a non-physical context refers to a setting where they do not have such face-to-face interactions but instead use tools to communicate with each other. The literature has begun to explore different features of the two contexts that enable or constrain followers to act, but it does not specially examine how followers and leaders co-construct these features and how these features are understood as opportunities and challenges to followers. To respond to this, this subsection builds on an emerging body of leadership research on non-physical contexts to present the various ways in which followers cope with their relationships with leaders. The reason why attention is paid to the possibilities emerging from non-physical contexts is that features of the potential of physical contexts have been adequately discussed in the previous subsection, while the particulars of non-physical contexts have not been articulated.

Potential opportunities for followers in non-physical contexts

There are emerging opportunities for followers to act towards leaders in non-physical contexts. Geographical dispersion plays a key role here in reducing formal leaders' direct influence on followers' actions (e.g. Al-Ani et al., 2011; Sivunen, 2006), and 'the patterns of how information is acquired, stored, interpreted and disseminated are changed' (Avail & Kahai, 2003). Before considering the distinct chances for followers in a non-physical context, I want to briefly review what kinds of resources followers employ in a physical context, which helps to make a comparison in a review of non-physical contexts. In a physical context, leaders can use language, facial expressions, body language and movements and other non-verbal clues to help deliver meanings and exercise control over followers. For instance, facial expressions can deliver emotions and create experiences of charismatic leadership (Christopher et al., 2014; Trichas et al., 2017); hand gestures allow leaders to produce emotional support and build emotional connections with followers (Talley & Temple, 2015). Other non-verbal clues also play a part, including loudness, eyebrow-raising, posture, gestures and touch, thus effectively creating leadership influence (Burgoon & Dunbar, 2006).

In contrast, the geographical dispersion feature of a non-physical context may facilitate followers to define and redefine their relations with leaders. It is found that leaders find it difficult to communicate clearly with followers due to an absence of these verbal and non-verbal elements (Zimmerman et al., 2008). One leader complained that '(I) write down more clearly what we mean ... humor is often badly understood in e-communication and I often go through my own mail messages before sending [them], to correct ambiguities' (p. 329). A degree of misunderstanding may arise, because both parties cannot capture the subtle relational meanings in communications (Darics, 2017). So there are advantages to followers themselves.

Based on an increasing level of uncertainty and ambiguity in meanings, followers may lack 'feeling the leader's presence' (Avolio & Kahai, 2003, p. 327). This presence relates to the 'reach, speed, permanence, and perception of a leader's communication' (p. 327). Based on Al-Ani et al.'s (2011) empirical investigation of a distributed team, such a decreased level of leader presence invokes a shift in the roles of followers and leaders: some members revealed difficulties in distinguishing leaders from followers, and they did not regard a project manager as a team leader. As scholars suggest, in such new contexts, traditional leadership roles are increasingly blurred, and followers can become leaders if they display certain 'task and process skills' (p. 228). In Collinson's (2006) paper, he suggests that followers are able to design and give dramaturgical performances to remote leaders intentionally. By using emails, followers do not just manipulate the content of information, but also 'where they are, what they are doing, and even who they are' (Collinson, 2006, p. 186). It is stated by Baralow and Tsoukas (2015) that the more asynchronous the communication (e.g. email), the greater the ability of individuals to 'rehearse' and 'reprocess' what and how they are doing.

Overall, the amount of followership literature on opportunities for followers in a non-physical context is not large, and most of the leadership literature focuses on how leaders manage and control the context, and places too much emphasis on leaders' influence. This downplays followers who are capable of shaping and reshaping the meanings of non-physical contexts. Even if there are few papers talking about followers' discretion in this context, they have started to pave the way for developing an enhanced understanding of how followers will think and enact there. However, my understanding of the nature of opportunities implied in this subsection is something less measurable and tangible than the more common emphasis in the literature. It is followers' inter-relational experiences with remote leaders that produce their own understandings and perceptions, which are important for articulating the meanings of opportunities. Followers focus on how to employ distinct resources in a non-physical context to build and develop their relationships, which is distinct from the relationships constructed in a physical context in terms of the kinds of resources and emerging opportunities.

Potential challenges in non-physical contexts

Despite the new opportunities available to followers in non-physical contexts, I further suggest that the context is also filled with challenges and constraints that followers need to cope with. In this subsection I draw from the leadership literature to introduce potential challenges in non-physical contexts. For the same reason, a few followership articles are now talking about this issue, and leadership studies have started to explore how leaders cope with the potential challenges arising from non-physical contexts. Taking a critical followership perspective, I focus on reviewing how followers who are located in such a context experience and make decisions in relation to leaders.

First of all, given that leadership meanings are open to multiple interpretations, followers have to deal with new situations while many leaders are adjusting and improving their leadership styles in order to fit in to the new context. Leaders increasingly realize the impossibility of employing the same content and style of leadership in a non-physical context as those in a physical context (Zaccaro & Bader, 2003). In the empirical study conducted by Al-Ani et al. (2011), it is shown that traditional leadership becomes fuzzy, as leaders are not pre-determined but selected by followers who experience strong interpersonal, technical or other leadership skills in some individuals. This calls for more attention to relational and task-focused leadership skills (Zimmerman, et al., 2008), and positive interaction styles (Shollen & Brunner, 2016), with the aim of promoting high levels of follower engagement. At this point, I am not going to explain in detail what new leadership styles and abilities are, but I want to emphasize that followers are facing dynamic and complex leadership situations. Leadership as an important contextual factor in this non-physical context is having new and significant influences on followers, in order to meet the needs of project and organization objectives (Lee, 2016), and so followers, as a result, have to make sense of these and adjust their behaviours to fit with changing leadership.

Second, some leaders have begun to consider making use of and manipulating language and symbols, in order to reduce distortions and misunderstandings of message content (Carvalho, 2007; Leusky, 2004). In Darics' (2017) study, he points out that leaders use a non-lexical token, 'erm...', with an ellipsis mark. Unlike in a physical context where it is often used to fill pauses, the symbol here helps leaders to express their thinking, hesitation and even rejection when they cannot physically meet followers. He also mentions utterance-chunking, breaking up a single utterance into several shorter components and sending them successively, rather than as a whole. This seeks to prevent followers initiating conversations and negotiations, but forces them to wait until their leaders have finished talking. It is reasonable to interpret that this status difference is likely to be constituted and reinforced to a certain extent (Darics, 2017).

Third, some leaders have considered building up trust relationships with followers. The idea of trust is actually not new in leadership research examining a physical context. It refers to strong expectations towards another person in terms of specific characteristics (Al-Ani et al., 2011). In the followership literature, it is suggested that trust helps to foster positive relationships between followers and leaders (Chaleff, 2008); trust also serves as a positive signal of an effective follower, when a leader explicitly addresses a follower (Williams, 2008). Bligh (2017) highlights that trust becomes critical to follower-leader relationships, especially when one party is at risk or vulnerable to another party. Along these lines, a non-physical context is a reasonable setting where traditional effective leadership is possibly being undermined (Al-Ani et al., 2011; Zimmerman et al., 2008). Trust may deliver new meanings, especially reducing the psychological distance between followers and leaders (Liao, 2017). This is because it brings geographically separated people together by improving confidence, expectations and respect towards each other (Furumo, 2018). In so doing, follower commitment and engagement are believed to increase by a significant margin.

However, it is argued that trust on its dark side becomes ‘a poisoned chalice’ for the parties involved (Skinner et al., 2013, p. 207). From their viewpoint, trust is a commodity that can be exchanged, manipulated and constructed in terms of different purposes. Trusting someone means having significant levels of confidence in and respect for the person; yet the trusted person may take advantage of this trust to force the first party to fulfil ‘unwanted obligations’ (p. 206). As a result, these obligations instead become pressure and a negative experience for the first party, although the trusted person’s intention may be positive and genuine. By this point, trust relationships are not always negative and dominant in a non-physical context. What we should be aware of is the risks that followers may experience in such trust relationships.

Last but not least, followers are experiencing increased levels of electronic surveillance in non-physical contexts. Although the leadership literature with its implicit leader-centric focus does not explicitly talk about the ways in which leaders watch and control their followers, this does not mean that surveillance does not play an influential role in non-physical contexts. In the previous subsection, I illustrated plenty of opportunities for followers to play an active or proactive role in context, which correspond to the potential threats to leaders who have to find ways to improve their control and influence in non-physical contexts. Here, surveillance can be considered particularly useful to achieve leaders’ leadership intentions. Basically, surveillance refers to the issue of a ‘few watching the many’ and it has become an important aspect of organizational life (Sewell & Barker, 2006). Unlike physical or day-to-day surveillance in a physical workplace, electronic surveillance (Lyon, 1994) refers to the ways in which people utilize technologies to watch and observe people who are geographically separated from their observers. A wide range of digital devices is involved, including cameras, computers, remote-sensing, mass media and social media (Hensen & Flyverbom, 2014). So, what sorts of impact do such kinds of electronic surveillance impose on followers? Here, I suggest linking this issue to the notion of Panopticon based on Foucault’s perspective. One of his

key contributions is a fresh understanding of disciplinary power in relation to Jeremy Bentham's concept of Panopticon. Foucault (1975) suggests that this new design of prison causes prisoners to be observed and controlled in cells around a central observational tower; prisoners cannot see whether they are being watched or not, but they are induced to self-monitor their behaviours and, as a result, they end up disciplining themselves as result of being under constant surveillance. On the basis of this analysis, electronic surveillance becomes subtle, ambiguous and contradictory to a certain extent (Koskela, 2003).

Based on these insights, electronic surveillance may play a different role in followership. On the one hand, leaders do not rely on physical buildings or architecture to develop monitoring and exercise control; instead, they make use of digital devices to make followers become 'valued objects' in the eyes of those in authority (Collinson, 1992). Followers, as a result, cannot visually 'see' their leaders and make clear judgement as to whether they are being observed and if they will be punished, they only experience surveillance in an uncertain and ambiguous way. It is suggested that followers may obey rules of performance and regulate their behaviours in a self-disciplined way (Collinson, 2006), and effective followership is accomplished to a significant degree. On the other hand, while followers may experience a high degree of electronic surveillance and have to tolerate the risk of being observed and being punished, this does not simply mean that followers become totally obedient and passive. According to Iedema and Rhodes' (2010) empirical study of camera surveillance in hospitals, the effects of surveillance are not so straightforward and direct; there is an 'undecided space' where employees' conduct and subjectivities are not purely determined by surveillance-based control and discipline (p. 201). Employees are still 'active and reflexive in deciding themselves to change their conduct' and 'engage in conscious practice' (p. 201). In this way, followers are knowledgeable and self-aware actors, capable of giving creative, instead of passive, responses to the structural constraints they operate under (Collinson, 2006).

A non-physical context, therefore, does not just provide opportunities and enable followers to become active and proactive in their interrelations with remote leaders, it also constrains them to a significant extent in terms of threats and challenges they need to tackle. This role of non-physical contexts is not dissimilar to the physical context described in the previous subsection: the creation and recreation of asymmetric relations, cultural elements, task requirements and peer pressure and expectations may enable or constrain followers to construct multiple meanings of their relationships with leaders in a physical space. By defining, understanding and evaluating the available resources to be employed, followers are also delineating the extent to which their relationships with different leaders in two different contexts, are satisfied in terms of their own interests and leaders' interests. In other words, both physical and non-physical contexts are more properly construed not simply according to the intentions of leaders, but also to followers who are embedded and capable of having influence over the meanings of contexts.

2.4 Follower-Leader Distance

This section addresses the importance of using follower-leader distance as an explanatory lens through which to view follower-leader relationships in physical and non-physical contexts. Why is follower-leader distance particularly useful in this study? There are two reasons. First, the construction of a follower-leader relationship rests on the physical proximity and detachment between two parties. That is, physical distance is an important contextual feature of the physical and non-physical contexts examined in the study, which cannot simply be overlooked. As introduced in the previous section, there are two seemingly contradictory situations, where followers interrelate with leaders in the same physical workplace, and simultaneously followers work with other remote leaders in a non-physical context. This idea of physical distance provides a foundation for followers to employ diverse resources to develop multiple relationships with different leaders in two different contexts. The second reason is an extension of the original concept of physical context to follower-leader distance, providing an exploratory lens to understand the very nature of follower-leader relationships and the potential of physical and non-physical contexts. The leadership literature has started to propose distance ‘as a characteristic of the leadership relationship itself’ (Shamir, 2013, p. 40), because it shapes how and to what extent followers and leaders can and do interact with each other (Bligh & Riggio, 2013). In their senses, leader-follower distance is not something external to two parties, but something created and recreated in their interrelations (Shamir, 2013). Instead of focusing on leader-follower distance, this study considers followers first to highlight the important role of followers in influencing and building relationships with or distance from leaders. The notion of follower-leader distance also draws our attention to the constructed and multiple meanings of the two contexts, which are shaped and reshaped through follower-leader interrelations in the construction of multiple types of distance and relationships. That is to say, aspects of follower-leader distance reveal distinct contextual opportunities and challenges followers need to address.

In the introduction below I provide a brief explanation of two aspects of follower-leader distance, dimensions and degree. First, dimensions illuminate ‘various forms that distance might take and what relationship it might portray when particular dimensions are activated’ (Lewandowski & Lisk, 2013, p. 21). Dimensions represent different types of follower-leader relationships. Relationships emerge from differences along with physical, psychological, cultural, functional, structural and other factors. For instance, when a follower and a leader are physically detached, it seems clear that the physical dimension plays an important role in their interrelations and may influence them to think, evaluate and construct their ongoing relationship (Kahai, 2013). Equally important, dimensions also reveal the feature of the context where both parties are embedded (Antonakis & Atwater, 2002). For example, a structural dimension of distance involving asymmetric elements shaped and reshaped by interrelations between followers and leaders can be concerned is a contextual factor influencing followers to enact different behaviours. The implication of this finding is that different dimensions can be shaped as different enabling and constraining

forces for followers. So far, the literature on leadership distance has acknowledged how leaders create and manage different dimensions of distance, which become distinct opportunities and challenges for followers to cope with. However, what is under-explored is the ways in which followers interrelate with leaders to create, adopt and challenge these dimensions. Taking a critical approach to studying followership, in the following section I will achieve this objective.

The second part of follower-leader distance is degree, namely, proximity and detachment. Generally speaking, degree refers to ‘the magnitude of the disconnect’ (Lewandowski & Lisk, 2013, p. 17). It raises another important issue about the extent to which a follower acts very differently according to whether a leader is close or distant (Collinson, 2005b). Proximity and detachment, in this sense, illuminate the extent of the separation between a follower and a leader. Cooper (2015) highlights the significance of proximity and detachment, in that people are constantly moving closer or away from each other, and never stay at certain fixed points. In his terms, they are embedded in a ‘double’ stance (p. 306). In this sense, two degrees invite me to develop a nuanced understanding of the tense nature of followership whereby followers and leaders are not mutually exclusive, but interdependent (Collinson, 2005b). Regarding the literature on leadership distance, it addresses the importance of a ‘reasonable’ degree of distance between two parties, with the aim of improving follower perceptions of charismatic leaders (Howell et al., 2005; Katz & Kahn, 1978; Popper, 2013) and conveying a group vision (Berson et al., 2015). For the same problem, this body of research retains a leader-centric assumption and focuses exclusively on leaders’ capabilities to create and maintain a certain separation from their followers. By assuming that degrees of distance are in the hands of leaders, researchers tend to reproduce a simplistic and narrow viewpoint of the nature of degrees. In their view, proximity and detachment are static and durable to a significant extent, depending on leaders’ actions. However, Collinson (2005b) argues that proximity and detachment are better viewed as ‘inescapable, mutually embedded and shifting features’ of followership relationships (p. 244). This means that, except for leaders, followers are also capable of making changes to the degrees of distance from their leaders, whether they reinforce expected degrees or recreate new degrees of distance.

In this section, my review is based on the emerging body of leadership research on leadership distance, because the followership literature does not explicitly investigate this issue. Distance has been much discussed in the leadership area in terms of ‘leadership distance’ and ‘leader distance’ (Bligh & Riggio, 2013; Collinson, 2005b; Lewandowski & Lisk, 2013), but I take a followership perspective to discuss how followers deal with potential opportunities and challenges. Only by developing these insights will it be possible to obtain a nuanced understanding of the complexities of followership in two specific contexts.

2.41 Physical Distance

Physical distance is defined as ‘how far or close any two entities are located to one another at a given point in time or for a particular activity’ (Lewandowski & Lisk, 2013, p. 22). Across relevant articles, physical distance has been widely recognized as playing an indispensable role in influencing and shaping leadership relationships (Howell et al., 2005; Kerr & Jermier, 1978). But there is diversity in its use in the literature. Some scholars, such as Keisler and Cummings (2002), explicitly investigate it in terms of measured units and identify its effects on face-to-face communication. Others interpret physical distance in relation to cultural and social distance (e.g. Howell et al., 2005; Napier & Ferris, 1993). I broadly accept this second option. But my study, informed by a critical approach to studying followership, does not fully accept the idea that physical distance is an external factor independent of actors’ experiences and understandings. In the following paragraphs I aim to develop a broader viewpoint.

On the one hand, in the literature on leadership distance, followers are described as being controlled and confined, in physical proximity, while their autonomy can be expanded when they are physically detached from leaders. Howell et al. (2005) point out that physical proximity offers leaders an opportunity to create and define meanings for their followers, because leaders can display transformational influences by demonstrating support, consideration and interest in followers’ needs. In contrast, physical distance can create ‘circumstances in which effective leadership may be impossible’ (Kerr & Jermier, 1978, p. 396). (178). It is explained that physical distance may reduce leaders’ ability to monitor the outcomes of follower performance and also, in turn, followers may have increased dissatisfaction with and dissent towards their leaders (Antonakis & Atwater, 2002). So, the idea of physical distance is complex and contradictory – it can have positive and negative consequences on a follower’ perceptions and experiences, thereby influencing how they react to leaders.

On the other hand, Yagil (1998) claims that followers are controlled at a physical distance as well, especially when distant leaders can exhibit collective efficacy, whereupon followers’ perceptions of effective leadership will be enhanced. When physical distance reduces the frequency of contact with leaders, followers will increase their perceptions of charismatic leadership and idealized influence (Katz & Kahn, 1978; see also Howell et al., 1998). At this point, physical distance cannot be understood independently from other dimensions such as psychological distance, as the latter adds new explanations to what physical distance means for followers (Lewandowski & Lisk, 2013).

In general, the leadership literature on physical distance has produced conflicting results. Some suggest that physical proximity has a positive impact on leadership, while others state that physical detachment produces effective leadership. Despite this, recent years have seen broad recognition in this body of literature that leaders have a key responsibility for creating and maintaining physical proximity and detachment. Followers, from their viewpoint, are described as those passively waiting to be managed and controlled at a certain distance from leaders. The underlying reason for this tendency is that scholars simply regard physical distance as a simple length, which can be measured and used by individual leaders. Aligning with the traditional leadership tradition that largely focuses on leaders' abilities and skills, this body of literature fails to reconsider the role of followers in experiencing, understanding and even transforming the effects of physical distance. Especially considering that degrees of physical distance are increasingly challenged by advances in technology (Lewandowski & Lisk, 2013), Wilson (2009) proposes new possibilities whereby 'one's colleagues can be situated in close physical proximity, yet seem quite distant; conversely, one's colleagues can be quite far away in objective terms, yet seem quite close' (p. 979). In these circumstances, followers may have the capability to rethink the meaning of physical distance along with psychological distance and other dimensions. Taking this perspective, I am able to interpret how physically proximate and distant followers understand and create meanings of their distance from and relations with leaders. That is, I put emphasis on what it actually means to be physically proximate and distant.

2.42 Psychological Distance

Psychological distance explains follower-leader distance as a function of perception and understanding, instead of the physical length between two parties. It is basically defined as 'a subjective experience that something is close or far away from the self, here, and now' (Trope & Liberman, 2010, p. 440). Psychological distance emerges when people perceive similarities and differences in 'affinity, ideology, interest, mood, motivations, ability, and temperament' (Lewandowski & Lisk, 2013, p. 24). Specifically, given that cognitive minds are treated as a primary source producing psychological distance, a follower perceives an authoritarian and aloof leader as distant, whereas they perceive democratic leaders as close (White & Lippit, 1968). A follower is able to make use of different leadership clues to generate or reduce the psychological distance from leaders. When a leader displays certain traits that a follower perceives as similar to him or herself, and the follower desires to boost perceived similarities, the follower intends to generate psychological proximity (Shalley & Gilson, 2004). It can be partly explained that the leader engages in shaping charismatic leadership and establishing a role model for his or her followers (Razin & Kark, 2013). In terms of the types of leader traits, it is suggested that when a leader shows technical or specific aspects to a follower, the follower reduces their subjective distance from the leader; in contrast, when a leader reveals some characteristics that are exceptional and general, a follower may build a

psychological detachment from the leader, as the follower has difficulty in appreciating these traits (Popper, 2013).

Therefore, based on the findings of this body of research, a key contribution is that it starts from the standpoint of followers, and it examines how they perceive and experience subjective distance from their leaders. This is distinct from leadership studies on physical distance, where the latter places too much emphasis on leaders' actions. The literature on psychological distance does not view distance as something primarily created only by individual leaders, rather it is something that is also influenced and created by cognitive and perceptual aspects of followers. This prompts me to develop an enhanced understanding of follower-leader relationships and followership contexts, which are influenced by the psychological aspects of followers.

2.43 Structural Distance

Thus far, I have discussed two types of follower-leader distance, physical and psychological. Compared with these two forms, structural distance is more concerned with 'perceived differences in status, rank, authority, social standing, and power' (Antonakis and Atwater, 2002, p. 16). This definition implies that structural distance does not primarily focus on geographical and psychological aspects but highlights the asymmetric or unequal nature of follower-leader relationships that arise in specific contexts. Concerning the existing literature, structural distance describes the hierarchical relations between followers and leaders, based on formal structures, positions and roles. My core argument here is that this conventional understanding of structural distance does not fully capture the complexity associated with unequal relations; especially, it leaves very limited analysis room for the ways in which followers think and act.

On the one hand, structural distance is created and maintained by individual leaders. This may make it difficult for followers to reduce their structural distance from leaders, compared with psychological distance (Shamir, 1995, 2013). When leaders only use very general symbols or words to deliver orders and instructions, followers may feel the relations are dominant and asymmetric; but when leaders demonstrate very interpersonal communications with followers, followers will feel their relations with leaders are less hierarchical (Shamir, 2013). As suggested, to a significant extent, leaders have the ability to control distance by 'preventing followers from perceiving the 'warts and all' nature of leaders' (Grint, 2009, p. 94). Distance, from their perspective, becomes 'a contextual moderator' (p. 1701), 'a neutralizer' (p. 1702) and 'an enhancer' (1706), strategically used and managed by individual leaders (Cole et al., 2009). As a consequence, followers may be marked out and forced to follow their leaders; in the meantime, these acts of followers may maintain and reinforce their distance from leaders (McCabe, 2013).

Nevertheless, it is argued that followers are capable of distancing themselves from leaders, thereby challenging and transforming distance (Collinson, 2005b). It is noted that followers may damage structural distance by distrusting leaders and questioning their behaviours (Reichard et al., 2013). It is also pointed out that followers may avoid collective or distributed responsibilities as well distancing themselves from leaders (Grint, 2009). Especially when leaders intend to utilize group-thinking and group work to induce followers to take more collective responsibility, followers are able to establish a distance from their leaders in order to ‘enable and legitimate the greater rewards and access to power resources of individual leaders’ and ‘to demand the scapegoating of these same leaders when the situation appears deleterious’ (Grint, 2009, p. 94). In this, the study provides an important clue that followers can prevent leaders from exercising too much control and projecting their own discretion and autonomy through distancing activities.

This is especially relevant to followership being situated in a non-physical context. I discussed in section 2.32 how this context brings both opportunities and challenges to followers. Looking through a lens of structural distance, on the one hand, followers appear to be able to ‘transcend the contextual constraints of physical, hierarchical or social distance and develop closer relations between them’ (Shamir, 2013, p. 54). It is proposed that followers are likely to use different features of email, telephone, conference calls and video-conferencing to manipulate meanings of remote leaders, and then redefine their relations with them (Collinson, 2005b).

On the other hand, followers may experience unpredictable, subtle and complex forms of leader influence and control in non-physical contexts. I have acknowledged the important role of electronic surveillance in follower behaviours. McCabe (2013) further establishes the linkage between electronic surveillance and structural distance: rather than simply pursuing a definitive answer that structural distance is reinforced or diminished by individual leaders, he encourages us to rethink the constitution of distance in a subtle way. Drawing from Kafka’s novel ‘The Castle’, he argues that ‘The Castle’ operates through ‘distant’ authorities that are never seen, and sometimes decisions are made as if by the official machinery itself without the aid of officials (p. 64). Digital devices such as cameras do not make a clear separation between followers and leaders, as followers ‘did not know where it had come from, then passed it on, and they were not told where it was going’ (McCabe, 2013, p. 94). In an empirical investigation of banking, he found that employees performed repetitive tasks every day, and they did not know whose work they were checking or who was checking their work. That is, while cameras are constantly watching and monitoring employees, there is still a significant degree of uncertainty and ambiguity in the effects.

Therefore, this body of literature provides crucial insights into structural non-physical distance, which is not definitely produced by formal structures and roles, but rather is co-created by people who have experience and interpretations of it. Followers are, consciously and unconsciously, engaging in creating, challenging and intensifying the structural distance from their leaders.

2.44 Functional Distance

Functional distance, according to Napier and Ferris' (1993) definition, refers to 'the degree of closeness and quality of the functional working relationship between the supervisor and the subordinate' (p. 337). Functional distance is especially suited to illuminate the level of leader and follower engagement in task-related issues, although the previous dimensions have issues of work performance mentioned with varying frequency.

First, improving the quality and frequency of communication between followers and leaders can reduce functional distance (Reichard, 2013). For example, if followers are allowed to recognize their work as valuable and meaningful, particularly when the vision is specifically tied to their everyday activities, they will improve their engagement with leaders (Berson, et al., 2015; Reichard, 2013). But when the vision is crafted as abstract, ambitious and 'an idealized image of [the] future', there is a tendency for followers to treat leaders as distant, not proximate (Razin & Kark, 2013, p. 246). Moreover, when followers have a job that allows easy access to necessary resources and improved job autonomy, functional distance may be further decreased (Reichard, 2013). Especially when followers are invited to participate in tasks beyond normal requirements, this may motivate followers to improve the quality and frequency of communication with their leaders (Anand et al., 2018). It is also noted that when leaders can identify the strengths and weaknesses of followers, provide individually tailored guidance and maximize levels of engagement, functional distance can be reduced as well (Zhu et al., 2011). Besides, Katz and Kahn (1978) provide an opposing perspective that day-to-day intimate and immediate feedback may destroy images of charismatic leaders, thereby undermining the quality of follower engagement. In their view, being a top-level leader and retaining authority and control requires a certain functional distance from their followers. Distance can be facilitated and reinforced when a physical distance exists between them (Antonakis & Atwater, 2002). Once followers gain richer information about their leaders, their perceptions of leadership charisma may be reduced or eliminated (Shamir, 1995).

However, these studies are very likely to result in a rather narrow understanding of functional distance. There are rich examples of how followers can influence their commitment to tasks and jobs; yet, this does not necessarily mean that followers are fully obediently and blindly taking part in creating and maintaining functional distance, corresponding to achieving organizational objectives and enhancing leadership effectiveness. It is increasingly recognized that followers are active and strategic in making sense of and evaluating leaders' expectations and demands, while simultaneously being capable of expressing dissatisfaction and dissent in subtle ways (Collinson, 2005b). Followers may create organizational 'back regions' inaccessible to leaders, such as toilets where they discuss dissent towards and dissatisfaction with their managers (Collinson, 1994). At first sight, followers may display considerable levels of follower commitment and reduced functional distance from their leaders; yet, at the same time, they may

deliberately craft an obedient role or identity to express scepticism about leaders.

This is more apparent in non-physical contexts where followers make it easy to ‘store, duplicate, forward, and manipulate the message’ (Kahai, 2013, p. 71). Leaders, as a result, may be misled into judging followers as committed or obedient in terms of their crafted presentations via email and other tools. Functional distance, in this regard, can be extended. Of course, it is suggested that leaders make use of ‘constant contact’ via tools and spend more time communicating with followers, in order to reduce the functional distance from followers (Kahai, 2013). Despite the lack of non-verbal clues, including eye contact, smiles, handshakes and nods, leaders can still reduce leader-follower distance and exercise their influence by manipulating their voices as supportive and caring by telephone (Remland et al., 1994).

2.45 Cultural Distance

Cultural distance, broadly speaking, refers to ‘the difference between host and home countries across various cultural dimensions, typically Hofstede’s (1980) dimensions’ (Lewandowski & Lisk, 2013, p. 32). Follower-leader distance can be culturally constructed, relying on the diverse cultural backgrounds, values and beliefs of followers and leaders. It is suggested in the literature that cultural values at a collective or national level play an important role in influencing how followers think and act.

Specifically, Hofstede (1997, 2001) provides important insights into the concept and suggests that cultural distance is strongly associated with the idea of power distance, namely, ‘the extent to which the less powerful members of institutions and organizations within a country expect and accept that power is distributed unequally’ (1997, p. 28). Based on a rather limited number of studies on the relation between cultural distance and leader-follower dynamics, it is recognized that followers in a high power-distance culture, such as China are willing to accept and admire their leaders who are also in an environment of hierarchical inequality, such as in Japan (Hwang & Francesco, 2010). Both Japan and China, according to Hofstede’s (2003) Power Distance Index, are high power asymmetrical cultures where a small group of people have the top authority and people need to comply with that authority. Followers may view such leaders as role models and mimic their behaviours, as they are in a situation of cultural familiarity and similarity, enabling both parties to easily accept each other and build cultural proximity (Daniels & Greguras, 2014; Yvette & Turner, 2003).

Examination of power inequality at a national level is helpful in understanding the ways in which cultural distance is constituted; however, this model overly emphasizes the collective level and precludes any concern with followers as active agents in the constitution of cultural distance. Assuming that followers are motivated by cultural values and beliefs to commit to leaders from similar cultural backgrounds, these studies seem to take for granted that cultural beliefs are fixed and stable without any changes to or transformations in specific contexts and interactions with particular leaders. Future work needs to allow more analytical space for the possibility that followers may create multiple interpretations and understandings of cultural distance from their leaders, even if they are located in the same power distance culture.

Overall, my review here of follower-leader distance has raised awareness of the importance of considering the multifaceted and dynamic nature of follower-leader relationships and the role context plays in interrelations and relationships. Taking a critical approach to studying followership, I pay more attention to how followers contribute to constructing and reconstructing their relationships with leaders; the review of dimensions also reminds me that the physical and non-physical contexts where follower-leader interrelations and relationships take place encompass diverse contextual features, including opportunities and challenges for followers to experience and deal with. Such a critical discussion of the body of literature also sheds light on the significance of exploring various degrees of follower-leader distance, such as proximity and detachment, prompting me to appreciate the tense nature of follower-leader relationships and followership contexts.

2.5 Conclusion

In the conclusion section, I want to summarise the linkages among three bodies of literature, i.e. follower-leader relationship, physical and non-physical contexts and follower-leader distance.

First, in section 2.2, I reviewed different conceptions of follower-leader relationship according to the followership literature. Specifically, under a trait-based perspective, the relationship is concerned with inherent, internal and individual aspects; under a role-based perspective, the relationship is considered more in an external sense, in terms of social and organisational regulations, responsibilities and expectations. The post-heroic perspective, especially relational and processual leadership studies, helps us shift attention partly away from followership's internal and external aspects towards a more relational, socially constructed and dynamic version. In section 2.23, I have offered a detailed discussion of the strength and limitations of the research body in expanding our knowledge of follower-leader relationships. In particular, I present the increasing critique of the risk of marginalising the role of follower's agency and blurring the line between followership and leadership to indicate that my notion of follower-leader relationship appreciates both the construction of shared meanings and the creation of divergent viewpoints, understandings and actions. The next section 2.24 further unpacks my argument by introducing a critical perspective on follower-leader relationship and followership. Distinct from the relational leadership perspective, the critical one encourages us to appreciate followership relationships as fluid, multifaceted, contested and co-created. I do not view followership relationships as fully shared and smooth but acknowledge the possibilities of asymmetrical influences and dysfunctional dynamics constructed and reconstructed in interrelations. This critical perspective, in turn, develops a much broader understanding of follower who may show loyalty, conformity and compliance to leaders and express dissatisfaction, indifference and resistance at the same time, which is under-explored in the former three bodies of followership research.

In the second part of the review of the literature, physical and non-physical contexts, I suggest developing a contextualised viewpoint of follower-leader relationships. A key element in the discussion is an interdependent relationship between followership relationships and followership contexts: follower-leader interrelations produce and reproduce distinct contextual opportunities and challenges, which in turn enable and constrain followers from developing relationships with leaders. I specify possible opportunities and challenges followers may face and deal with in the physical and non-physical contexts and suggest developing a nuanced understanding of follower-leader relationships in specific contexts where multiplicities, contradictions and dynamics can be better demonstrated.

The third part of the literature on follower-leader distance takes a further step and suggests that follower-leader relationships can be understood and captured through a distance lens. Building upon leadership distance literature, I introduce two basic elements of distance, i.e. dimensions and degrees, and acknowledge the significance of grasping the forms and dynamics of followership relationships. More importantly, I also suggest turning part of the attention from leader-follower distance that overly emphasises leaders' practices on creating and maintaining distance with followers, towards follower-leader distance where followers can play an active role in creating oppositional forms of distance with leaders.

Therefore, this research aims to develop a nuanced understanding of follower-leader relationship in physical and non-physical contexts, which have resulted from the literature but require more conceptual and empirical work. I develop two research questions that help understand the phenomenon of followership more fully:

Q1: How are follower-leader relationships shaped and reshaped through followers' interrelations with other actors?

Q2: How do physical and non-physical contexts influence shaping follower-leader relationships?

The first question highlights that the development of a follower-leader relationship relies on the capability and opportunity of followers to interrelate with leaders and other actors such as peers in specific physical and non-physical contexts, instead of hierarchical structures that confine followers and leaders to binary opposing relationships. It invites the researcher to look at diverse actors with which followers interrelate and grow a better understanding of the dynamics of follower-leader relationship in particular and the followership phenomenon in general.

The second question concentrates on developing a more nuanced understanding of physical and non-physical contexts, which are not merely fixed and stable settings in terms of hierarchical structures and positions but can be mediated and constructed by followers' interrelations with leaders and peers to shape different opportunities and challenges to which followers, in turn, must respond. On this basis, I can appreciate physical and non-physical contexts as a much more inter-relational phenomenon and move beyond previous studies' narrow view of them. This question can articulate new ways of thinking about the dynamic interplay between follower-leader relationships and followership contexts and capture followership as a complex phenomenon.

Chapter 3: Research Methodology

3.1 Introduction

To reiterate, the research aim of this study is to explore followership in physical and non-physical contexts. This aim can be achieved by developing an enhanced understanding of the dynamics of follower-leader relationships in two contexts. Given this, this chapter moves on to conduct a discussion of research methodology as the backbone of empirical investigation. According to Crotty (1998), methodology refers to ‘the strategy, plan of action, process or design lying behind the choice and use of particular methods and linking the choice and use of methods to the desired outcomes’ (p. 3). Choosing a methodology is a systematic way to study how research is to be carried out and it requires a discussion of key methods, strategies and techniques involved in the process.

Implementing the methodology requires a sophisticated view of philosophical approaches to analyzing the nature of the phenomenon under enquiry (Schwartz-Shea & Yanow, 2013). A great deal of followership work such as trait-based studies tends to adopt a positivist stance to designing the research process, taking a controlled and scientific approach to measure and identify sets of follower traits, which are seen as the objective reality independent of participants’ perspectives or experiences (e.g. Junk & Dick, 2014; Sy, 2010). However, I argue that such a research design might be unable to explore the complex nature of the followership phenomenon. As Law (2004) suggests, ‘while standard methods are often extremely good at what they do, they are badly adapted to the study of the ephemeral, the indefinite and the irregular’ (p. 4). What researchers should do is to shift the gaze from viewing the reality as existing independently, to viewing the reality as something in which people engage to make and constitute meanings (Schwandt, 1994). In this study, I assume that the very nature of followership is inter-subjective, referring to participants’ inter-relations with each other. I also employ an interpretivist approach to access and understand the participants’ inter-relational experiences, from which to interpret rich meanings of followership complexity. Thus, the objective of this chapter is not to simply sketch out what I did in the research process, but to justify these crafted choices consistent with the research aim, philosophical assumptions and unpredictable practical situations.

This chapter is structured around six sections. The first section is devoted to a discussion of the philosophical assumptions underlying the study, paying particular attention to why an inter-subjective stance and an interpretative approach are particularly useful to help explore the followership phenomenon. Second, this chapter explains why a purposive selection strategy and a single case study are appropriate to capture the complexity of followership. Third, it explains in detail how I accessed the particular organization involved and the participants. Fourth, this section justifies semi-structured interviews as the main data-elicitation method and elaborates the particulars, including the relation between interviewer and interviewees, the types of interviews and details of the interview questions. Next, this chapter conducts a brief discussion of transcription and translation, which are involved in the preliminary stage of data analysis. Finally, it concludes with key information about the research process.

3.2 Research Philosophy

A research philosophy refers to ‘a system of beliefs and assumptions about the development of knowledge’ (Saunders et al., 2019, p. 124). These include ontological assumptions about the nature of the subject of study, epistemological assumptions about the ways of acquiring knowledge about the object of study, and philosophical approaches that draw from different philosophical assumptions and allow researchers to generate particular ways of investigating a phenomenon in the context of research (Mason, 2002; Maynard, 1994). A fine-grained discussion of the philosophical beliefs underlying a study will establish a solid basis to inform the research procedures, strategies and techniques (Crotty, 1998; Johnson & Clark, 2006). Researchers are advised to become aware of and examine their beliefs in the nature of the phenomenon and the extent to which he or she believes they remain detached from the actual participants (Silverman, 2017). The understanding of a phenomenon may already have been established according to certain philosophical assumptions, which may not yet be explicit (Burrell & Morgan, 1979; Hadot, 1995).

According to the research aim of the study, that is, exploring followership as a complex phenomenon in terms of the dynamics of follower-leader relationships in physical and non-physical contexts, it is assumed that there is a particular way of understanding and investigating the very nature of followership. Ontologically speaking, followership is not an external and independent phenomenon with objective meanings to be captured, but a multifaceted phenomenon accessed through the inter-relational experiences of participants. In this chapter, one of my objectives is to fully elaborate my inter-subjective position in relation to the research aim I developed previously. In this way, I am better equipped to justify the important choice of an interpretivist approach, which will have a significant impact on how I select the case and conduct data generation and analysis. Besides, another objective is to discuss the philosophical issues

adopted in existing followership research and evaluate them in relation to the positions I develop in this research. This helps to make the discussion of my research philosophy more explicit.

3.21 Inter-subjectivist Assumption

This subsection illuminates the inter-subjective ontology of the study. Two reasons are involved. First, inter-subjectivism is consistent with the critical approach to studying followership that this study takes. This ontology emphasizes a connection ('inter') between two subjects (Bakhtin, 1981; Ricoeur, 1992; Schutz, 1972), and it is particularly suitable to explore the relational, dynamic and embedded nature of the followership phenomenon. Second, developing this ontological position can move away from the conventional binary division between subject and object, which has been assumed by most followership work. This kind of subject-object dichotomy comes as no surprise, as it has been long preserved and developed in philosophy and other research fields, but this clear division has limited our understanding of followership complexity. Taking an inter-subjective stance is helpful to conceptualize a more interrelated and dynamic nature of follower-leader relationships and followership contexts.

To begin with, inter-subjectivists argue that the human world consists of inter-relations between ourselves and others. To explain this, I introduce relevant ideas from Schutz (1972), Bakhtin (1981) and Ricoeur (1992), who inspired me to understand inter-subjective ontology. According to Schutz (1970), 'while we experience and interpret the world from within our own biography as free actors, we also share our world with others in a mutual relationship' (p. 167). It emphasizes the inherent sociality of humans and is concerned with sharing meanings with each other. It does not directly reject the existence of any objective or subjective realities, but it does stress the importance of appreciating 'the dynamics of relationships' through which meanings and understandings can be accessed (Crossley, 1996, p. 52). In this sense, inter-subjectivity can be viewed as a means to understand the meanings of elements of social and cultural lives.

For example, a plan, from Schutz's (1972) viewpoint, exists as a more or less coherent and individual product; in the meantime, a plan is at least produced and shaped in a type of inter-relations or negotiations with other people. So, it is neither 'I' nor 'you' who can decide a plan, but 'We' (p. 167). The sphere of 'We', according to inter-subjectivism, forms the basis for statements about reality. With this idea, he does not just make a claim for the significance of inter-relations, but also suggests that a focus be put on the role of a single subject and his or her perception: 'every subject remains biographically unique' (Heritage, 1984, p. 59). The subject is very important, as he or she has a degree of self-awareness and empathic intentionality towards others (Schutz, 1972). This requires a gradual process of inter-relating to other people (Schutz, 1974); only in this way are subjective perceptions inter-subjectively constituted and mutual

understandings developed (Crossley, 1996). The goal of an inter-subjective position is thus to focus on the phenomenon as experienced in everyday inter-relations, and then to elaborate meanings of the phenomenon through subjective appreciation and understanding. From this ontological position, there can be no other basis for a phenomenon than the inter-relations between people.

Concerning the specific ways in which people relate to others, different philosophers conceptualize them differently. On the one hand, to achieve shared understandings, people may orient to more or less standardized and tried-out-before ways of inter-relating (Schutz, 1972). People do so, because others can understand them or they are expected to do so. In the case of a tax office, a taxpayer and staff are both active agents in the relation, but the inter-relation is much more routinized and institutionalized, as taking and paying money are more or less automatic (Schutz, 1972). Schutz's (1972) inter-subjectivism thus rests on an understanding of inter-relations as more or less asymmetric, obligatory and moral, instead of completely autonomous (Levinas, 1981). On the other hand, inter-subjectivists who draw on hermeneutic and dialogical notions differ in their basic assumptions. Ricoeur (1992) argues that narratives are temporary in the sense of being ongoing in terms of our ways of acting and speaking. Bakhtin (1986) further explains narratives as new, because 'an utterance is never just a reflection or an expression of something already existing and outside it that is given and final. It always creates something that never existed before, something absolutely new and unrepeatable' (pp. 119–120). Both Ricoeur (1992) and Bakhtin (1986) acknowledge that inter-relations are not just embedded in standards or habitual knowledge, rather they are constructed and reconstructed in ongoing and shifting inter-relational dynamics between people.

So far, I have illuminated the key ideas of inter-subjectivism originating from different philosophers and demonstrated two major ways of inter-relating between ourselves and others. This is a significant point for understanding the very nature of followership: followership should be captured in how followers and leaders relate to each other in everyday life. Before moving on to demonstrate how inter-subjectivism provides a new ontological perspective on followership, I recognize the importance of clarifying the positions of subjectivism and objectivism adopted in the dominant followership studies and discussing the problem of subject-object distinction arising from those positions. This is because the problem implicitly leads to leader/ follower separation, which may hinder us from developing a more dynamic and complex understanding of followership (Einola & Alvesson, 2019; Learmonth & Morrell, 2019).

I make a distinction between subject and object, and between subjectivism and objectivism, which are often conflated. Broadly speaking, subject refers to a conscious and self-actualized individual, while object is perceived as a material thing, a rule or other entities (Hughes & Sharrock, 1990). Objectivists consider that reality exists independently, to be investigated, and they often abstract and identify a ‘concrete structure’ as reality without an appreciation of intuitive, cognitive and subjective aspects (Crotty, 1998, p. 5). In contrast, subjectivists think that meaning does not come from any fixed object but is created through people who mentally create and ascribe meanings to objects (Crotty, 1998). So, they often understand the world through beliefs and perspectives, which are fundamental guidelines for generating meanings of the world (Burrell & Morgan, 1979).

Regarding the followership field, I recognize that there has not yet been much discussion of fundamental philosophical positions underlying the dominant approaches. Yet, it is pointed out that followership research tends to align with the ontology and epistemology of traditional leadership models (Uhl-Bien, 2014), and the latter often assumes that leadership is ‘real’ and ‘objective’, which can be measured and generalized by law-like relationships (Antonakis et al., 2014, p. 23; see also Klenke, 2016; Uhl-Bien & Ospina, 2012). This means that followership studies have organized their concepts and theories around certain ontological assumptions, although they appear not to describe such kinds of thinking. Here, I have selected two dominant followership approaches as examples to explain the strengths and limitations of their implicit ontological stances. Concerning trait-based followership scholars, they tend to adopt an objective position, assuming that follower traits and characteristics are durable and independent from interrelations and situated contexts (e.g. Sy, 2010); their focus, therefore, is on ‘an analysis of the relationships and regularities between various elements which it comprises’ (Burrell & Morgan, 1977, p. 3). In contrast, role-based followership researchers take a subjective stance and assume that followership is not something independent of individuals, but something defined and redefined through subjective perceptions of those people who exhibit ‘multiple’ realities of the followership phenomenon (e.g. Cunba et al., 2013; Kellerman, 2008; Shamir, 2007). For example, in Carsten et al.’s (2010) study, the research participants generated three types of follower roles, passive, active and proactive, to describe the meanings of followership, so that their perspectives become an important source, providing diverse versions of followership.

Nevertheless, there is a danger that the conventional positions of objectivism and subjectivism lead to a clear subject-object distinction (Hughes & Sharrock, 1990; Johnson & Duberley, 2000). While every individual produces different perceptions, objects remain durable and unchanged (Cunliffe, 2011). This implies that when two positions privilege either object or subject, they implicitly reinforce an independent and separated relation between object and subject (Crossley, 1996). Consequently, in relation to followership research, I argue that this assumed subject-object distinction is strongly associated with the problem of the leader-follower dyad in followership work. Trait-based followership scholars such as Junk and Dick (2014) and Sy (2010) put too much emphasis on objectified forms of follower traits and overlook the external influence of follower contexts and leaders on the production of these traits; in a similar manner, role-based followership researchers pay too much attention to individual and internal perceptions while neglecting the possibility that these perceptions can be influenced by their dynamics with leaders and other actors. These assumptions implicitly portray followers and leaders as opposing and separated agents, drawing a dualistic relation between them (Collinson, 2005a). In this dualist tendency, a follower appears to be seen as a dominant subject, and he or she is capable and active in follower-leader relationships, but a follower may still face the risk of becoming dominated and downgraded, ‘an empty vessel waiting to be led, or even transformed by the leader’ (Goffee and Jones, 2001, p. 148). This leads to leaders being prioritised for higher positions and roles, while allocating passive and obedient features to followers. Therefore, there are increasing calls to move beyond such a traditional dualistic viewpoint towards a more dynamic and dialectical way of thinking (Collinson, 2011, 2017; Collinson & Tourish, 2015).

Inter-subjective ontology is fundamentally valuable in moving beyond such a clear subject-object and leader-follower distinction, by providing two important implications for understanding the very nature of followership. The first implication is to develop a fresh understanding of people’s relations to other people, and the other is people’s relations to their contexts, which are the two key aspects of my theoretical positioning. Regarding people’s relations to other people, an inter-subjective standpoint suggests that followers have their own perspectives and understandings, and they are simultaneously embedded in mutual relationships with others. What differentiates inter-subjectivism from subjectivism is that the former does not merely regard followership as something generated from subjective perceptions, but as something emerging in a constant state of flux, depending on the inter-relations between follower and leader. Ricoeur (1991) and Bakhtin (1986) suggest that inter-relations create ongoing and new meanings for the world and the meanings cannot be predicted and produced simply by individual perceptions. Taking this stance, I can situate the experiences, understandings and perspectives of followers and leaders in broader and more dynamic forms of relationships. This is consistent with a critical approach to studying followership, inviting a call for more thinking about the interdependent nature of the relations between follower and leader (Collinson, 2006, 2011; Tourish, 2015). Of course, focusing on the inter-relational nature of followership does not necessarily deny the existence of subjective perceptions and understandings, because the ways they relate themselves to others serve as the basis for producing multiple viewpoints and

perspectives on their experiences. In so doing, we can develop a more nuanced understanding of the followership phenomenon.

The second implication is that taking an inter-subjective stance aligns with my understanding of the relation between followership contexts and follower-leader interrelations. In Chapter 2 (Lit. Review), I addressed the significance of the followership context as a constituted part of the followership phenomenon; I also pointed out the narrow conception of the followership context in most followership work. I would take this point further: the ways people relate with others are fundamental to shaping their understandings of and relations with their contexts, based on insights from scholars taking an inter-subjective position (Bakhtin, 1981; Ricoeur, 1992; Schutz, 1970, 1974). Schutz (1970) acknowledges that engagement with others is asymmetrical and obligatory to a certain extent (see also Levinas, 1981). This does not imply a durable nature of asymmetry and obligations, but it does indicate the possibility that interrelations shape and reshape the meanings of particular contexts, which simultaneously influence the relationships between individuals. At this point, an inter-subjective stance is able to move away from such an objectified and separated sense, towards developing a more nuanced understanding of followership context.

3.22 Interpretivist Approach

An inter-subjectivist position encourages the researcher to focus on exploring the inter-relational aspects of followership. This is particularly relevant to an epistemological assumption, considering a certain degree of closeness between the researcher and the participants being studied, and particular knowledge of the phenomenon can be gained from those participants' experiences, perceptions and understandings (Creswell & Poth, 2016). By considering the extent of the 'distance' the research maintains from those being researched, it is suggested that the closer the researcher accesses the participants and the field, the more knowledge he or she can acquire about the phenomenon (p. 21, see also Wolcott, 2008). This study suggests that the researcher does not search for objective knowledge of followership, but chooses to get as close as possible to the participants and their understandings, which offer multiple versions of inter-relational experiences and form the basic meanings of the followership phenomenon.

These philosophical assumptions are key premises to develop an interpretivist approach to exploring followership in this study. Generally speaking, an interpretivist approach is concerned with 'how people experience some phenomenon – how they perceive it, describe it, feel it, remember it, make sense of it and talk about it with others' (Patton, 1990, p. 104). In short, the goal of this approach is to appreciate the participants' perceptions and understandings of their situated experiences and to interpret how these descriptions produce multiple versions of the phenomenon under investigation. The interpretivist approach in relation to the particular ontological and epistemological assumptions of this study is that an interpretive

researcher believes that reality is relative, constructed and diverse, and he or she rejects the viewpoint that reality is pre-existing and external (Berger & Luckman, 1967; Johnson & Duberley, 2000). He or she enters the field with certain prior insights into the research but assumes that this is insufficient to develop the research, because of the multiple, unpredictable and shifting aspects of what is perceived as reality; what the researcher needs to do is to remain open to new perspectives and understandings of the situated phenomenon (Schwartz-Shea & Yanow, 2013). As Denzin (1989) suggests, an interpretive researcher identifies meanings of a phenomenon ‘by locating them back in the natural social world’ (p. 60). Hence, the goal of interpretive research is to obtain and appreciate understandings and descriptions of situated participants, from which the researcher can make faithful interpretations of the phenomenon under study.

To begin with, my interpretivist approach differs from a positivist approach, which has been implicitly taken by many followership studies. Trait-based followership researchers, based on an objective stance, seek to capture ‘a described objective inquiry’, by identifying a law-like causal relationship between variables (follower characteristics) and the phenomenon (followership) (Montuschi, 2003, p. 119). The problem with taking such a positivist stance is that it aims to discover law-like objective relationships, but fails to appreciate that the social world is multiple and relative to different people (Johnson & Duberley, 2000). Role-based followership researchers, who assume a subjective ontology, are interested in investigating the perspectives and understandings of actors who are involved in real organizational contexts (Hughes & Sharrock, 1990). Despite their focus on multiple perspectives, they still maintain an exclusive focus on ‘the contents of representations and understandings’, while overlooking situating those cognitive perceptions in broader contexts and surroundings (Crossley, 1996, p. 75). Therefore, existing followership research is unable to provide a full explanation of the phenomenon of followership.

In moving away from a positivist approach, this study, by taking an interpretivist approach, aims to acquire perspectives and understandings from followers, leaders and other relevant actors. Given that the research aim is to explore followership in terms of follower-leader interrelations, I suggest that followers’ experiences and their own understandings are an important source for capturing actual experiences and producing my interpretations of the followership under study. I also gave voice to the experiences of different leaders in physical and non-physical contexts, where they have daily inter-relations with followers and can express their own perspectives on these inter-relational experiences; based on these complex inter-relations, the researcher can get closer to the actual meanings of the followership phenomenon.

Furthermore, an important issue addressed here is how I can acquire, interpret and create knowledge in a faithful and robust manner. There has been a call for definitive criteria to assess faithful interpretations in quality research and the past decade has witnessed the development of such a series of checklists or guidelines (Klein & Myers, 1999; Myers, 1997; Pattern, 2002; Walsham, 1993); however, there is no one set of fixed criteria applicable to all studies (Corbin & Strauss, 2015). But this does not mean that we should totally reject certain broad standards that can direct us to achieve trustworthiness and rigor. As noted, 'elegant and innovative thinking can be balanced with reasonable claims, presentation of evidence, and the critical application of methods' (Whittemore et al., 2001, p. 527). In this study, I broadly adopt Amis and Silk's (2008) viewpoint that all criteria should be consistent with the ontological and epistemological foundations on which a study is based. In their sense, non-foundationalism, as a research orientation that moves away from positivism and resonates with interpretive work, draws on 'moral concerns', which are less related to designing a research process efficiently and mechanically, and more associated with researchers' values and beliefs that guide the process and the consequences of that guidance (Amis and Silk, 2008, p.457; see also Leitch et al., 2010). That is, quality criteria are 'internalized' throughout my whole research process (Amis & Silk, 2008, p. 458).

In relation to this interpretive work, the key criterion I develop and adopt is a strong consistency developed between philosophical positions, theoretical positions, research objectives and the whole research design. I choose to provide sufficient details of the research process, including accessing, collecting and analyzing empirical data (Leitch, 2010). For example, I present what each participant describes, faithfully analyze in terms of words, phrases and sentences they use, and provide an explanation of each step, how I move from their descriptions to my interpretations of their situated meanings. The reader is then provided with an adequate opportunity or sufficient information to assess the robustness and trustworthiness of the approach taken. Gephart (2004) supports the view that researchers often fail to articulate 'how research practices transform observations into data, results, findings and insights' (p. 458). In Leitch et al.'s (2010) terms, substantial validity is important, and it is 'thought through carefully from the inception of the study to the completion of the research process' (p. 74). In light of the above, as an interpretive researcher, it is my responsibility to tell a robust and compelling story from the participants' insights and understandings.

Overall, an interpretive researcher deals with a more complex relation with the researched empirical world. This differs from positivist studies that often simply delineate researchers and researched as two opposing poles. For example, trait-based followership researchers tend to constitute an independent relation with researched follower traits as inherent and stable. The researchers take a controlled and structured approach to investigate followership, by measuring and identifying traits as inherent and stable variables of followership. They remain detached from the participants who are important to the research and believe that there is a clear line between the researched traits and personal experiences, values and judgements (Hughes & Sharrock, 1990).

In contrast, an interpretivist researcher, on the one hand, believes that the research phenomenon, followership and the participants are interdependent and mutually interactive. This requires getting closer to the participants and listening to their descriptions and understandings, which are the basis for development of my interpretations of followership. As such, the researcher is not ‘a privileged possessor of expert knowledge’, while the researched ‘becomes as important as the researcher in formulating the problem, discussing solutions, and interpreting findings’ (Lather, 2004, p. 200). So, I kept asking myself a question during the research process: are my research practices not divorced from participants’ real contexts? I wanted to avoid too much pre-understanding from the academic literature, which might hinder me taking a fresh look at the situated participants’ experiences. As suggested, the researcher takes an active role in the process (Holstein & Gubrium, 2004). A key part of the active role of the researcher is to provide sufficient evidence to support my judgements at every step of the whole research process, in order to ensure my interpretation as trustworthy and rigorous (Leitch, 2010).

3.3 Theoretical framework: follower-leader distance

This section introduces the distance framework for this study. I present a full account of how the dimensions were selected, how they were considered to relate to each other, and how two degrees were interdependent. The leadership framework I present here uses a ‘combined’ approach to consider ‘the multidimensional constellation of conceptually distinct characteristics that commonly occur together’ (Meyer et al, 1993, p. 1175; see also Antonakis & Atwater, 2002). I broadly take this approach because it is helpful to capture a comprehensive and rich understanding of follower-leader distance and follower-leader relationship.

I chose physical, psychological, cultural, structural and functional dimensions to represent different forms of follower-leader relationships distance may portray. First, in the leadership distance literature, physical distance is treated as a precondition for leadership distance, and there is an ongoing debate around how it facilitates or hinders leaders from exercising leadership influences (Antonakis & Atwater, 2002; Kerr & Jenier, 1978; Howell et al., 2005). Second, psychological distance has been increasingly concerned as a direct and subjective experience of a person who is far away or close to the self (Berson et al., 2015; Liberman et al., 2007; Popper, 2013). It may include an element of sentiment, originating in a feeling of respect for the leader who is perceived as highly experienced (Todorov et al., 2005), but it is possible to see that direct and subjective experience is the major component in the conceptualisation of psychological distance (Popper, 2013). Accordingly, I use the concept to keep open to multiple follower’s perceptions of their leaders. Third, cultural distance and psychological distance have been used interchangeably, but there are a growing number of studies that make a distinction attributing the

focus of cultural distance to subjective perceptions of the cultural group's norms, roles or values (Farth et al., 2007; Napier & Ferris, 1993; Vidyadrthi et al., 2014). While both dimensions capture subjective perceptions of leadership distance, cultural distance has been demonstrated to relate these perceptions to a cultural level. Fourth, structural distance and social distance are often used interchangeably as an essential socio-organisational factor of leadership distance (Cole et al., 2009; Shamir, 1995; Yagil, 1998). But I used the concept of structural distance to highlight differences in organisational structures, supervision structure and other hierarchical drivers (Napier & Ferris, 1993); rather than focusing on organisational relations, social distance considers more social relations emerging from social status, or social contact (Bogardus, 1928; Park, 1924). Finally, recently there have been efforts to examine functional distance and emphasise its dynamics and flexibility that can be influenced, shaped and transformed through leaders' interactions with their followers (Razin & Kark, 2013; Reichard et al., 2013). As discussed in the literature chapter, the notion focuses on frequency and quality of communication and interaction, distinguishing with other dimensions.

There are certain 'relationships' among these dimensions identified in the leadership distance literature. First, physical distance, as a basic condition of leadership relationship, cannot be studied independently. As Wilson et al (2008) suggest, the physical distance may not directly affect organisational outcomes; but their relationship is primarily 'a mediated one' with the processes of communication and identification which have a more direct impact on the construction of distance (p. 985). So, an understanding of physical distance is often associated with an examination of psychological distance (Popper, 2013), functional distance (Razin & Kark, 2013) and other dimensions: in Collinson's (2005) case of an oil company, it is recognised that the geographical separation of leaders from the platform appeared to 'reflect and reinforce their hierarchical, cultural and psychological detachment from employees' (p. 236). Second, Napier and Ferris (1993) suggest that 'functional distance mediates the relations of psychological and structural distance' (p. 328). As 'behavioural manifestations of distance' (p. 337), functional distance is related to the concept of 'doing distance', and it is viewed as an essential basis for activating leadership and followership distance (Razin & Kark, 2013, p. 252). Third, structural distance that presupposes hierarchical differences can be reproduced, reinforced and challenged by followers' construction of functional distance (e.g. creating back regions to reduce accessibility and communication with their leaders) (Collinson, 2005). The hierarchical separation and control will also be questioned by followers who play an active role in crafting the images they construe of their leaders (Shamir, 2013). Structural distance may be redefined in followers' psychological detachment in many different ways. Finally, psychological and cultural detachment were concerned as not just a source of understanding experiences of physical separation and functional detachment (Berson et al, 2013; Popper, 2013), but also consequence and outcomes of physical and structural distance that significantly influence how leaders and followers' perceived distance with each other (Collinson, 2005).

Moreover, the simultaneous, interdependent and interwoven nature of two degrees (i.e. proximity and detachment) has been addressed in the literature (Baxter & Montgomery, 1996; Cooper, 2015; Simmel, 1908, 1971). I do not deny the limitation of current leadership distance frameworks that treat degrees as ‘dichotomous, opposing and static categories that are separate and separable’ (Collinson, 2005, p. 244). I hope to explore the interplay between closeness and detachment deeply, as it helps understand how follower or leader influence is exercised and negotiated. In doing so, my framework of follower-leader distance will have a focus on emergent, situated and inter-relational aspects of follower-leader relationships.

3.3 Single Case Study

This section justifies the choice of a single case study and provides details of the setting and participants included in the case. Before this, I want to highlight that purposive selection is useful for developing such a single case study on followership. Purposive selection refers to a deliberate way of selecting ‘particular settings, persons, or activities’, in order to gain data that cannot be obtained from the other two strategies (Maxwell, 2012, p. 88, see also Light et al., 1990). It makes a distinction from a theory-drive selection strategy, which uses prior theoretical knowledge in determining selection foci (Gilchrist & Willams, 1999; Johnson, 1990). It is also different from a data-driven strategy, which is concerned with how theoretical saturation occurs as new participants are selected and their interpretations add new insights into the investigated phenomenon (Glaser & Strauss, 1967). An important consideration for purposeful selection was to have an appreciation of particular participants and settings in order to achieve the research aim and answer the research questions (Maxwell, 2012). My selection of participants and settings was purposive in nature, as the types of participants and setting I selected were expected to be fully consistent with the research subject, the research aim and the philosophical position. Rather than randomly selecting individuals from a broad population, as an interpretivist researcher I looked for a group of participants whose insights and understandings would be particularly useful to help me interpret the followership phenomenon under study.

Based on this, I now provide an overall justification for employing a case study as a key strategy of this followership research. The justification for such a strategy stems from Kuhn’s (1970) argument that all knowledge in the social sciences is context-dependent, which is the basis for developing theoretical understandings of and perspectives on a phenomenon. In a similar sense, concerning the followership phenomenon, this study considers that it is not an objective and predictable reality, but rather a context-dependent phenomenon, produced by inter-relational experiences of the participants. A case study is suitable because it is close to real-world problems and situations that support developing a nuanced

understanding of the phenomenon through a fine-grained analysis of the studied situation (Flyvbjerg, 2001).

I adopt a single case study as a further strategy. Single case studies have continued to suffer the criticisms of being a ‘one-shot case study’ and lacking scientific value (Campbell & Stanley, 1963). In this sense, a single case study is often regarded in terms only of its sample size, that is, as N-or-1 research (Hilliard, 1993). However, I argue that there should be a clear distinction between a single case study based on an interpretivist approach, a single case experiment or a single case quantitative analysis, because the research focus of the latter is primarily on collecting direct and observational data and has an objectivist assumption of reality (Hilliard, 1993). Instead, an interpretive single case study is very significant, as it enables the researcher to appreciate and capture ‘the particularity and complexity’ of a case (Stake, 1995, p. xi). This means that the intention of a single case study is not to compare the results of this case with others, but to generate ‘contextual insight and rich data generation’ for a particular phenomenon (Marlow & McAdam, 2011, p. 660). Accordingly, to explore followership in terms of follower-leader relationships in physical and non-physical contexts, a single case study is useful and appropriate to conduct an in-depth and detailed exploration of how followers and leaders inter-relate with each other, from which to construct follower-leader relationships in two particular contexts. The findings from this study cannot be generalized to all populations, only to particular participants, particular contexts and their particular inter-relational experiences. Accordingly, the findings from this case study can be analytically linked to followership with the intention of developing theoretical insights into follower-leader relationships in two contexts in particular, and the complex nature of followership in general.

In the following I explain two criteria for selecting a single case, which are consistent with the research aim and the philosophical position underlying this study. Two criteria are concerned at two different levels of the case, organizational level and participants’ level. First, it should be an organization that does not just enable followers to have face-to-face interrelations with leaders in the same workplace, but also one that needs to facilitate followers interrelating with remote leaders who might be in the same or different groups as those in the physical workplace. This criterion was selected to ensure that I would have sufficient data for analyzing the role and potential of both physical and non-physical contexts, as defined previously, i.e. followers who are embedded in two contexts and engaged in dealing with different opportunities and challenges shaped and reshaped by their interrelations with different leaders there. In so doing, this corresponds to the research aim of exploring followership as a complex phenomenon in physical and non-physical contexts.

The second criterion concerns the types of participants. There should be a group of individuals, called followers, who interrelate with different kinds of individuals, called leaders, in two different contexts. At the beginning of Chapter 1, I defined a follower as someone who displays a significant degree of obedience and passivity towards another person called a leader, and there is at least a degree of asymmetry or inequality in the positions or structures underlying the two parties. In Chapter 2 (Lit. Review), I also highlight that a follower can be a knowledgeable and discretionary person who is capable of creating, evaluating and transforming their relationships with leaders, based on a critical approach to studying followership (Collinson, 2006; Ford & Harding, 2015). In this sense, the follower participants in this case may be situated in certain formal asymmetric structures and positions, but at the same time they are likely to have opportunities to build active relationships with the same or different leaders in two contexts. Moreover, there should be the same or different groups of leaders, who are situated in the same physical workplace and remote workplaces. It should be noted that the remote leader might come from the same organization or a different organization that has some sub-contracts or collaboration plans with the organization where followers are situated. Later, when accessing the empirical setting, I found that followers interrelated with two different groups of leaders in two different contexts, which capture an important issue in terms of the research aim. I also realized that there are significant interrelations between followers and their peers in the same physical workplace. It has been suggested that peer relationships can be an important contextual element in a context where followership occurs, because peer support and peer pressure enable followers to rethink and redefine their relationships with leaders (Cunha et al., 2013; Howell & Mendz, 2008). My focus in this part of the data was placed on how followers' interrelations with peers in the same workplace influenced their perspectives and behaviours towards two different leaders in physical and non-physical contexts.

Now I move to provide a full description of the case study organization. I will depict below not just the formal relationship between financial assistants and the managers in a same outsourcing company and workplace based on formal contract, but also the formal relationship between the financial assistants and financial analysts from global financial institutions based on an outsourcing contract. Specifically, the case study organization is the research centre of a global outsourcing financial analysis providing organization, *FinanCo*. Founded in the 1980s, *FinanCo* remains headquartered in India, though it has expanded into Europe, North America, South America and Asia due to strategic demand. The organization provides analytics services to more than 500 world-leading commercial and investment banks, insurance companies, consulting firms, private equity players and asset management firms. Financial outsourcing means that global financial institutions receive demands from their investors (business organizations) and then outsource a part of functions to third-party service providers such as *FinanCo* who is expected to provide a satisfactory quality of data analysis service. The outsourced work financial assistants performed include but is not limited to: analysing trends or specific ratios in a business organization's balance sheet and income statement, updating market information from newspapers and other media and notifying these to the

analysts, providing periodic reports for management of transactions in the covered periods, preparing summaries for presentations to prospective customers. Based on these work, financial institutions such as insurance companies may use them to design and implement new insurance and risk-management products; consulting firms may use the documents prepared to help their clients to make decisions for buying, selling or holding portfolio investments.

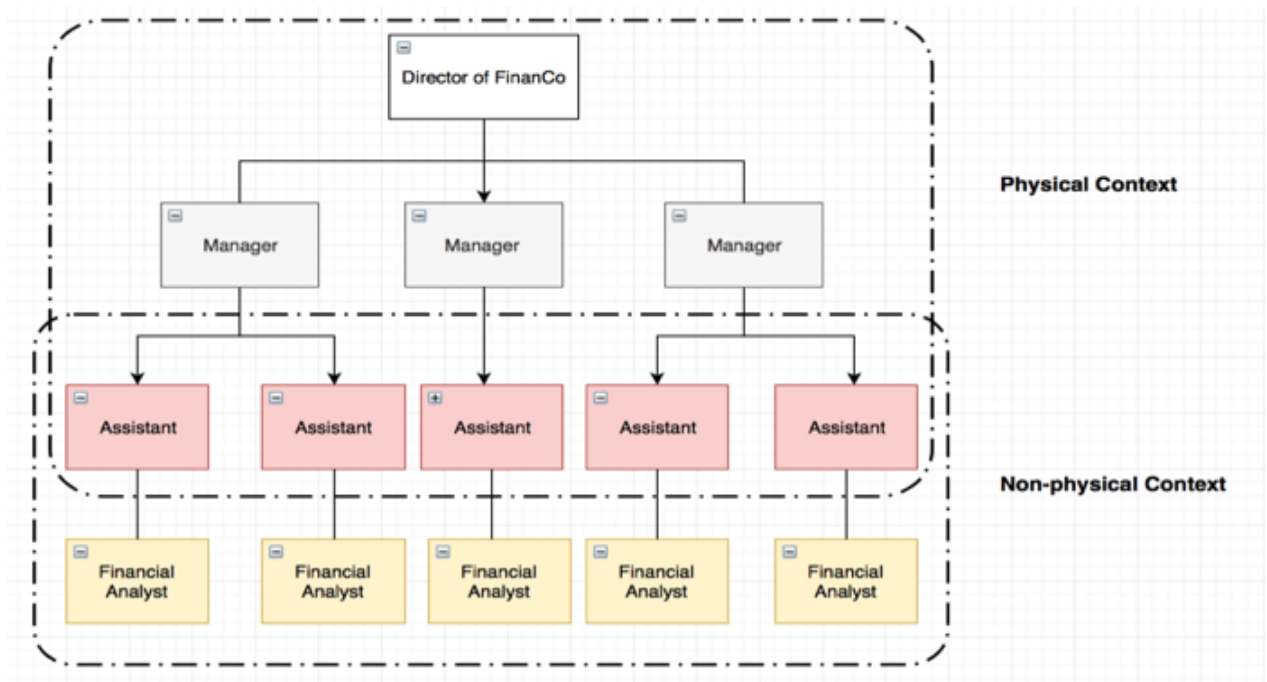
Two kinds of formal relationships involved in the case are concerned. First, there is a formal relationship between financial assistants and managers in the physical context. The managers are responsible to recruit and select appropriate financial assistants whose abilities and experiences should align with the needs of financial analysts. To achieve this, the managers often invited financial analysts to interview potential candidates and offered short technical training courses to new assistants them in order to help them to learn quickly the work. Financial assistants are divided into two levels, junior financial assistants whose work experience is less than five years and senior financial assistants who have more than five years' experience. Duties are generally similar but vary in the participation level of analysts' projects. A senior assistant has more opportunities to look at beyond the collection of raw numbers and develop own judgement and perspectives on the data. Before annual performance review meetings with assistants, managers often first had a discussion with those financial analysts who provide detailed assessment of the skills and qualities of their financial assistants in the past year. It was explained by managers that financial analysts' positive feedback on assistants' work and more than five-year work in this organization were important factors of increasing salary or promoting the person to the senior position, and these criteria were formally documented in regulations. Thus, financial analysts' opinions and suggestions served as an important evidence for managers to discuss salary increase, promotion and goal settings with financial assistants in annual meetings. Moreover, the second type of formal relationship between financial assistants and their financial analysts, as mentioned above, is based on an outsourcing contract. It determined that each assistant was hired out in terms of projects and he or she needed to offer data collection and analysis work as a fundamental part of the project developed by the financial analysts. There are a few examples of extending the collaboration even if a project was completed, because some analysts were very satisfied with the assistant's performance and told managers to hire him or her continuously.

Besides, many assistants' accounts revealed that their remote analysts conducted remote camera monitoring over them, with the aim of ensuring that they performed efficiently in the remote offices. Yet this issue was not formally shared by managers and financial analysts and I was unable to confirm this from them. The managers and analysts tended to avoid talking about cameras when they were asked '*if there was camera arranged in offices to monitor assistants' behaviors?*'. Even if I changed the question to a more subtle one '*do you think assistants worked in the offices felt stressful or uncomfortable?*', the managers stressed the workplace environment as '*less hierarchal*', '*friendly*' and '*relaxing*', instead of directly addressing the camera surveillance issue. To comply with the ethical rule of respecting interviewees' rights, the interviewer chose not to push them further to make them uncomfortable during

the interviews. I will provide a detailed discussion of camera surveillance in the discussion chapter, where the uncertain, intangible and ambiguous features of camera led assistants to identify certain ways to distance themselves from the controlling power, instead of simply adopting it.

Therefore, according to the two types of formal relationships described above, the case meets two criteria for selection. First, there was a group of *financial assistants* located at a research centre in China, and they interacted with managers and peers in the same workplace and from the same organization. Second, the financial assistants were required each day to build and maintain collaborative relationships for remote financial analysis. Diagram 3.1, below depicts the contextual background of the case. Boxes in red indicate financial assistants in the financial analysis organization who provide outsourcing serves to global financial institutions. Boxes in yellow refer to financial analysts in different organizations and workplaces around the world who commission work from FinanCo and the financial assistants responsible for carrying it out. Both parties are embedded in a non-physical context as shown on the right-hand side. The boxes in grey show managers working at the same organization as the assistants and both parties are located in a physical context, as shown on the right-hand side.

Diagram 3.1 Contextual Background of the Case



In the remainder of this subsection, I briefly explain why this case has the potential to demonstrate follower-leader relationships in physical and non-physical contexts. This relates to a brief discussion of why three types of actors (financial assistants, remote financial analysts and managers) can be understood as followers and leaders.

Financial Assistants as *Followers*

Within this case, follower participants comprised 23 young financial assistants. They differed in their ages, departments (e.g. IT, Sales and Research departments), positions (e.g. junior and senior), the sectors their analyses focused on (e.g. real estate, media, clothes), working years (from several months to five years), education backgrounds (e.g. the US, the UK, Australia and other universities) and gender (male and female). In this study, I call them followers, because they expressed a significant degree of deference to remote analysts and managers in two contexts, although the forms of deference were different. Embedded in a physical context, the financial assistants took advice and suggestions from managers and expressed a certain level of compliance. Although I call them ‘followers’ at this stage, I do not deny that there was a certain level of something ‘formal’, related to formal hierarchy, constraining and enhancing their obedience orientation.

Financial Analysts as *Leaders*

In addition to financial assistants, I also included four financial analysts from different organizations and workplaces who had collaborations with the organization where the followers were situated. In essence, as they were commissioning work and were experts in their fields, they could establish the parameters that needed to be met. At this point, they wanted financial analysis tasks to be completed, which the financial assistants were contracted to do, so the financial assistants did not have any choice in the matter. Accordingly, while the two parties did not belong to the same organization and were not situated in the same formal hierarchy, analysts who had the capability to provide guidance and direction to assistants can be viewed as leaders. Having decided on an appropriate number of financial analysts, recruiting that number of analysts for this study became a difficult issue, which I will elaborate in the next section about negotiating access. But it is unnecessary to do so, as the primary focus of this followership study is on how followers interrelate with leaders. To access leaders’ perspectives based on a large number is very likely to shift the primary focus towards an understanding of leadership instead of followership.

Managers as *Leaders*

I also included three managers who had close interactions with the 23 financial assistants in the same workplace and organization, in order to improve our understanding of followership complexity. Managers played an important role in the physical workplace. Officially, they were line managers of the financial assistants and were responsible for allocating the assistants to different analysts in terms of analysts’

demands and the nature of tasks. They had rich experience of how to write up analysis reports and how to build up collaborations with people in global financial institutions. So, they were capable of offering professional guidance and advice to those assistants. In this sense, the managers can be considered as leaders who exercised significant influence over those financial assistants. I did not include the director of the organization in this case. He was constantly travelling to develop business networks with global financial institutions. I tried hard to reach him and expressed my desire to interview him via Skype, but he simply rejected my request for personal reasons. Table 3.1, below, lists basic information about the financial assistants, financial analysts and managers involved in this case. To ensure anonymity, I assigned each participant a different name along with brief biographical details of gender, position and location, which was agreed by participants.

Table 3.1: Participant Information

Participant	Gender	Position and location
Zhou	Female	Junior Assistant (CN)
Xin	Female	Junior Assistant (CN)
Hai	Male	Junior Assistant (CN)
Han	Male	Junior Assistant (CN)
Lan	Female	Senior Assistant (CN)
Kin	Male	Senior Assistant (CN)
Jing	Female	Junior Assistant (CN)
Lao	Male	Senior Assistant (CN)
Mei	Female	Senior Assistant (CN)
Qing	Male	Junior Assistant (CN)
Fang	Female	Junior Assistant (CN)
Wei	Male	Junior Assistant (CN)
Lin	Female	Junior Assistant (CN)
Jack	Male	Junior Assistant (CN)
Kant	Female	Junior Assistant (CN)
Wen	Female	Senior Assistant (CN)
Ying	Female	Senior Assistant (CN)
Rui	Male	Junior Assistant (CN)
Xiang	Male	Junior Assistant (CN)
Pan	Female	Junior Assistant (CN)
Tu	Female	Junior Assistant (CN)
Fei	Female	Junior Assistant (CN)
Xue	Female	Junior Assistant (CN)
Mike	Male	Manager (India)
James	Male	Manager (India)
Ken	Male	Manager (India)
Tom (Xiang's analyst)	Male	Analyst (in Hong Kong)
John (Jing's analyst)	Male	Analyst (in Hong Kong)
Mark (Qing's analyst)	Male	Analyst (in the UK)
Zheng (Kin's analyst)	Male	Analyst (in Hong Kong)

3.4 Access Issue

This section explains how the research aim and selection criteria guided me to gain access to these participants and the organization. In this section, I reflect on the important issue of access, which can be seen as the first stage of getting closer to those participants and their situated contexts (Martha et al., 2014). I conducted two stages of access, one at the organizational level, the other at the participants' level. Concerning the first stage, Easterby-Smith et al. (2002) points out that 'cold calling is a waste of time, and it is essential to start with some kind of personal contacts, however tenuous' (p. 71). In this study, I employed gatekeepers as an effective means of accessing a suitable organization based on the selection criteria I crafted before. A gatekeeper generally refers to a person who has 'inside' information and networks that can help researchers gain access to a given organization (Given, 2008, p. 2). One of my friends worked for this organization, FinanCo, as a financial assistant, and helped me to approach the manager responsible for external affairs, and thus I was granted permission to conduct research in the organization, by politely e-mailing the details of my research to the manager. Of course, this level of access was only the beginning of the story and the next issue was to 'obtain cooperation and trust inside' (Easterby-Smith et al., 2002).

After deciding on the organization to be investigated, I entered the second stage and started to access and seek agreement from participants, including financial assistants, managers and remote financial analysts. It is important to note that the gatekeeper invited her friends to participate in my research, which was a kind of purposive selection. More importantly, I continued to seek permission from more financial assistants, in order to gain richness in the data. At this stage, I also used a snowball approach to access a small number of participants, which then became large (Bryman, 2004; Noy, 2008), by encouraging assistants who were interviewed to deliver their positive feelings to their peers. An advantage of this selection strategy, based on a certain degree of randomness, was that more assistants who initially hesitated to accept my offer then agreed to participate, and as a result, more assistants agreed to get involved. My research reputation and mutual trust with the assistants developed and helped ease the anxiety and suspicions of potential participants (Feldman et al., 2004), because they learnt from interviewees that the interviews did not take very long time and the whole process was very relaxed and comfortable.

Moreover, I concentrated on seeking consent from remote analysts and managers, by allowing the assistants to persuade their analysts to participate. By this point, I considered the importance of ethical issues for this choice. As Silverman (2017) notes, developing ethical awareness is closely related to a project's success. If I contacted remote financial analysts directly, this might not only damage their relations with their assistants, but also influence the possibility of accessing more participants and data. To address this ethical problem, I respected the private communication channels established between assistants and analysts. This also helped assistants to build and increase their trust in me, since I was viewed as a faithful and moral researcher who did not put them in a difficult or dangerous position (Mason, 1995). As a result, a certain number of analysts agreed to participate, but others declined. One person who declined explained that they were too busy to participate; even if he had some spare time, he preferred sleeping and enjoying his private life. I fully understood their concerns and worries, because as an outsider of their lives and contexts, that I could not push them to do what I wished them to do.

Reflecting on the whole access process, I realize that some participants refused to participate without giving any reasons, which was the main pressure for me. For instance, one interviewee told me that there was an assistant who was very 'special' in the organization. He often 'taught' and 'led' other analysts, instead of being led. Unfortunately, he rejected my offer by simply saying, "*I don't want to be interviewed*," although I explained a lot about my research. The lesson from these examples is that a researcher should be more aware of different attitudes and viewpoints on their research and talk with key informants or those who reluctant to participate in interviews (Easterby-Smith, et al., 2002). This may not just help us to understand why they rejected a request, but also gain more experience of dealing with contradictory perspectives in future projects.

3.5 Data Generation: Semi-structured Interviews

Now I touch on one of the key elements in the research design, the data generating method. I adopted Mason's (1996) idea of 'data generation' rather than 'data collection': data did not exist independently in this empirical case and could not be neutrally collected; they were generated through the ways in which the researcher related the self to empirical participants (p. 36); so the primary objective of my data generation method was to generate understandings from participants who gave contextual descriptions of their 'experiences' of inter-relations. Kvale (1996) suggests that 'if you want to know how people understand their world and their life, why not talk to them?' (p. 1). An interview, as a 'construction site of knowledge', can be the most suitable way of generating data on follower inter-relational experiences (p. 1). There is a debate as to whether interview data can represent direct access to the 'experiences' and 'feelings' of interviewees (Holstein & Gubrium, 1995). It is suggested that the philosophical presumptions of a study are

crucial to the choice of interview, i.e. the use of interviews is associated with a phenomenon that is portrayed in a scientific or interpretive way (Jennings, 2005; Kvale & Brinkman, 2008; Olson, 2011). To repeat, the ontology of inter-subjectivism of this study suggests that experiences of inter-relations are an important property of the followership phenomenon; my interpretive stance has a primary interest in participants' understandings and descriptions of the ways they actually related to others. What I can obtain from interviews is perspectives, experiences and understandings, acquired by asking a set of questions.

By this point, I employed the basic idea of semi-structured or guided interviews, given the research topic and research objectives (Silverman, 2013). That is to say, a semi-structured interview fundamentally reflects and acts upon a dynamic relationship between the researcher and interviewees (Galletta, 2013). On the one hand, a semi-structured interview has, more or less, some degree of 'structure' including, interview location, schedules and predefined interview questions, with the key purpose of keeping a focus on the research aim of this study (Hesse-Biber & Leavy, 2010). The advantage of a certain level of structure is that the interview direction is clear and to the point, reducing the amount of data that is irrelevant to the primary aim of this study (Galletta, 2013). On the other hand, a semi-structured interview allows some latitude for interviewees to talk about what is of interest or importance to them (Crabtree & Miller, 1992). This means that while the interviewer has a certain list of questions to ask the interviewees, the interviewer remains 'more loosely' with the questions and encourages interviewees to freely express their viewpoints and opinions during the interview process (Hesse-Biber & Leavy, 2010, p. 102).

3.51 Relation between Interviewee and Interviewer

To further explain the nature of a semi-structured interview, I illustrate the dynamic relation between interviewee and interviewer (Edward & Halland, 2013; Kvale, 2009; Schwartz-Shea & Yanow, 2013). As Gubrium and Holstein (2002) wrote, 'at first glance, the interview seems simple and self-evident, because respondents are relatively passive in their roles, which are delimited by the interviewer' (p. 3). However, this seemingly conventional asymmetrical relationship can be better understood as 'the interview dance', a certain degree of power shifts between interviewer and interviewee (Hoffman, 2007, p. 337). This new model moves away from what Gubrium and Holstein call the 'basic model' towards a more inter-relational and interdependent one. In the following I do not analyse the power shift I experienced in semi-structured interviews in detail, but I want to discuss how both parties, interviewer and interviewees, engaged in exercising power and creating a significant level of dynamics and interdependence.

On the one hand, while the researcher initiates contact and discussion, she, as an interpretive researcher, respects the perspectives and viewpoints of interviewees during the interview process (Easterby-Smith et

al., 2002; Schwartz-Shea & Yanow, 2013). Although I decided on certain broad questions to open up and guide the interviews, to a significant extent what interviewees talked about determined the best questions to be asked. Some assistant participants, for instance, asked me: ‘Do you have options, A, B and C, so that I can select the answers?’ and ‘Does my answer fit your research objective?’ They thought an interview was more of a structured survey with the same set of options and answers. I explained the primary aim of this research, which was to explore their understandings and perspectives relevant to their experiences and contexts, instead of capturing the accuracy of something. ‘I appreciate any input from you on my questions, and there is no right or wrong answer. I am not doing quantitative research that seeks truth, so any perspectives or viewpoints are valuable for me.’ Here, an important aspect of the interview dance is to shift power back to the interviewees, allowing them to provide more nuanced viewpoints on their experiences (Hoffman, 2007).

On the other hand, there is an intentional exertion of power by the interviewer, that is more or less deliberate, so that an interaction goes beyond a conversational exchange (Kvale, 2009). It is suggested that it is important to ‘assess, on the spot, the relevance of each part of the interaction to your research questions, or to what you really want to know’ (Mason, 2002, p. 45). Although my interviewees’ understandings were likely to produce some answers relevant to my research topic of followership and issues of inter-relational experiences, I still paid specific attention to creating ‘linkages’ between my research aim and follow-up questions. To reiterate, the aim of such an interpretivist approach was to carefully interpret and understand how followers experienced inter-relations, so this required me to be sensitive to each viewpoint that was consistent with my primary aim. What they wanted to talk about and what I really wanted to know, therefore, were sometimes in tension: as I explained in the section on epistemology, I constantly evaluated my own ‘ethical position’ through which to understand whether my way of data generation was helpful to produce a contextualized understanding of the phenomenon (Leitch, et al., 2010, p. 74). In this sense, power should not necessarily be eliminated from interviews, as it produces more satisfactory data to be analyzed (Kvale, 2000); but at the same time, I paid attention to any potential harm to the interviewees, who might feel uncomfortable answering certain questions.

3.52 Combining Face-to-face and Online Interviews

In the data generation process, I combined face-to-face and online forms of semi-structured interviews as a credible way of accessing the participants’ experiences and understandings. First, a face-to-face interview was a straightforward and effective way of acquiring what participants wanted to talk about. Face-to-face interviews took place in an open area outside FinanCo’s offices. A key reason was that I was not allowed to enter the offices, due to confidentiality issues. Each interview lasted for around 45 to 65 minutes, depending on whether the interviewees wanted to continue talking.

Second, I also employed an online form of interview to help generate rich participants' descriptions of their experiences. While online surveys and email interviews have flourished in many disciplines, an online synchronous interview is still a relatively uncommon way to generate data (O'Connor & Madge, 2016). The key objective of my online interviews was still to achieve a 'stronger degree of internal consistency' between the research aim and interview procedures (James & Busher, 2009, p. 38). The media I chose were Skype and WeChat (a ubiquitous Chinese multi-purpose messaging platform), which were frequently used by the participants in their work. These tools helped to constitute a very focused synchronous setting, which resembled a conventional face-to-face interview. An important advantage of conducting this kind of interview was an increased level of researcher control over the quality of data generation so as to enhance the credibility and quality of data generated (Alien, 2017). By carefully listening to the interviewees' responses throughout the entire interviews, I was constantly judging whether their responses were relevant to the topic of study and how I could devise follow-up questions to establish 'linkages' with the research aim. What was distinct from the face-to-face interviews was that the participants chose to use a verbal mode to participate in the interviews, and there were few non-verbal clues, including facial expressions and body language, during online interviews. Some may question if this may influence the flow of an interview (Orgad, 2005), but quality in an online interview can be achieved if 'the researcher is attentive to the specific sensitivities created by the virtual arena' (Sanders, 2005, p. 77). I found that an online setting stimulated both parties to have a greater focus on the conversation itself, instead of other external elements that might cause them to misunderstand each other. I often raised my voice and used simple sentences or phrases, and indicative words such as 'umm', 'yes' and 'all right', in order to prompt my interviewees; these techniques can help make a conversation more fluent and build up a more productive and positive interactive relationship.

Another advantage of conducting online interviews was that it was less stressful and more flexible than those face-to-face interviews, as the interviewees were interviewed at home or in the office, where they felt comfortable in a familiar and non-threatening environment (Gruber et al., 2008; Salmons, 2012; Trier-Bieniek, 2012). The strength of an interview is also associated with the ethical position of the researcher, who is expected to design a research process that makes the participants feel comfortable and secure (Silverman, 2013). During the interview process, I noticed that the interviewees could control their own social space, which may not be the case in face-to-face encounters (Alien, 2017; Holt, 2010). For example, one assistant interviewee told me before her interview that she had to wait for the analyst's call in the office, so doing an online interview was entirely appropriate. During another interview, the analyst mentioned that she was lying on the sofa at home, more comfortable than sitting in a chair and staring at the interviewer. Based on these two instances, an online interview may complement a face-to-face interview, as it is most suitable for interviewees who were constrained by physical distance and other personal factors. Therefore, whether interviews were conducted in a physical or non-physical context, the interview

procedure was consistent with the integrity of the research aim and the researcher paid specific attention to ensuring ‘the same level of confidence, commitment, privacy and trustworthiness in a “body-less medium”’ (Seymour, 2001, p. 161). It is the researcher’s responsibility to consider the conditions of every online setting for interviews in more depth, in order to improve the credibility and quality of data (James & Busher, 2014).

3.53 Interview Questions

Bailey (2017) reminds us that ‘a carefully crafted interview can be worthless if you fail to ask yourself one important question: will the interview elicit useful information for answering my research questions?’ (p. 104). Designing suitable interview questions is critical to ensure the quality of interview data. Before going into the details of the procedure, I want to make a conceptual distinction between interview questions and research questions. According to Maxwell (2004), interview questions are ‘what you ask people to gain (their) understanding’, while research questions ‘formulate what you want to understand’ (p. 106). The interview questions in this study consist of two parts, pre-determined and follow-up questions, both of which were used to help address and develop the final research questions.

Table 3.2, below, shows five steps of devising interview questions. I adopt Mason’s (2002) framework for developing interview questions. The objective of the first and second steps was to demonstrate the key research aim and two research questions. In the third, I broke down the two research questions into seven predetermined interview questions. For example, a question was ‘what specific activities or practices did you engage in with other actors?’ This question resonates with the viewpoint that an interview question should be simple and clear, not one that interviewees found too complicated to express their opinions on (Maykut & Morehouse, 1994). Fourth, according to the different answers, I created ‘follow-up questions’ during each interview, in order to ‘delve more deeply into some of the topics or issues addressed, or to clarify answers given by the respondent’ (Brennen, 2017). This was consistent with an interpretive stance that required the researcher to be open to perspectives and knowledge from the participants. For instance, when an interviewee mentioned that interacting with analysts was stressful, while working with managers was relaxing, I asked: ‘In what ways did you experience “stressful” and “relaxing”?’ I encouraged him to give examples to better explain how these experiences occurred. Finally, I revised the questions asked in every interview and added new questions while preparing for the next interview. Hence, the interview guide was valuable, as it identified key issues to be probed during each interview, and it allowed the researcher to modify the interview questions to better suit the participants’ responses to a significant degree.

Table 3.2: Sequences of Developing Interview Questions

Step 1: To identify the research aim	Research Aim: To explore follower experiences of interacting with other actors in physical and non-physical contexts
Step 2: To narrow down the research aim by developing two key questions, which serve as guidance for developing my interview questions	<p>-How do you engage with others? -What opportunities and challenges do you face in your context?</p> <p><i>(These two key interview questions are in accordance with two research questions, but the former are modified to be more understandable way in an interview context)</i></p>
Step 3: To break down the two key questions into ‘mini’ interview questions	<p><i>The first question that focuses on relationships can be approached in several questions, such as:</i></p> <ol style="list-style-type: none"> 1) What specific activities or practices do you engage in with other actors every day? 2) Are there different expectations, demands and interests between you? 3) How do you cope with these differences? 4) How do you build up relationships differently with different people? <p><i>The second question that emphasizes context can be approached in several questions, including:</i></p> <ol style="list-style-type: none"> 1) Do you think there are any opportunities or advantages in working with remote analysts without face-to-face engagement? Or limitations? 2) Do you think there are any constraints when working with managers in the same workplace, compared with collaborations with remote analysts? 3) What is/are the difference/s between face-to-face interaction and remote interaction? Which do you prefer? Why?
Step 4: To develop new questions in an interview context	<p><i>Except for the pre-defined interview questions above, I constantly formulated new questions during each interview, depending on what the interviewees talked about. All emerging interview questions were also consistent with the research aim. For example, when an interviewee mentioned that interacting with analysts was stressful, while working with managers was relaxing, I continued by asking:</i></p> <p>‘In what ways do you experience stressful and relaxing?’ ‘Can you give examples?’</p> <p><i>Again, I invited the interviewee to compare and contrast different experiences of working in physical and non-physical contexts.</i></p>
Step 5: To summarize and revise all the questions	After each interview, I revised the questions and added new ones to prepare for the next interview. So, the interview questions were constantly changing.

3.6 Transcribing and Translation

As Coffey and Atkinson (1996) state, ‘we should never collect data without substantial analysis going on simultaneously’ (p. 2). In this study, transcribing and translating interviews into data involved a preliminary stage of data analysis, because I had start to stay close to the data and make sense of them for later in-depth analysis. In this section, I discuss the techniques and stages to move from interviews to data I could employ to do analysis.

Transcription is a crucial step, as it moves our data from a verbal form to graphic representation (Kowal & O’Connell, 2013). Tilley (2003) points out that how a person engages in transcription seriously influences the data. I as a researcher was mindful of ‘continually making judgments about what to write down or record, what you have observed, heard and experienced, what you think it means’ (Mason, 1995, p. 52). There are diverse ways of doing transcription, but the choice of method should be ‘appropriate for the specific purpose of a given research project’ (Aufenager, 2006, p. 111). Given my interpretive stance, I suggest that their data did not exist independently, but emerged during the research process with a certain degree of influence from the researcher who made interpretations and analysis. This influence is strongly associated with a process of ‘constructing’ transcripts through ‘the close attention and interpretive thinking that is needed to make sense of the data’ (Lapadat & Lindsay, 1999, p. 82), rather than simply transforming tapes into written words. So, a transcript of an interview is not a replication of some objective reality, but something that captures the interviewee’s meanings and is ready for interpretation.

I combined ‘broad transcription’ and ‘focused transcription’ approaches to produce a comprehensive and nuanced overview of the data (Gee, 1999; Gibson & Brown, 2009). The former was used in the early stages of transcription, by reading and writing down all that was uttered in an interview, providing a broad overview of what occurred. At this stage, I did not hire transcribers to do this task because, taking into account the interpretive nature of transcription, I was the most appropriate person to make sense of the data. I was very careful with each decision I made during the transcription process. First, I did not transcribe all the interviews at once; I transcribed every interview the same day it was carried out. This helped to have a good recollection of what took place on the day. Second, during each transcription task, I listened to each interview at least once before transcription, and appreciated the underlying coherence of contextual meanings. Second, I tried my best to transcribe the interview tapes verbatim, but I paid attention to some intermittent sentences, which were organized in more fluent ways. I also paid close attention to the pitch, loudness and duration of spoken words, and marked them, which indicated interviews’ emphasis and stresses on particular points (Kowal & O’Connell, 2013, p. 72). For example, an interviewee emphasized in a clear tone that: ‘an analyst was my most important person during my work’. This produced a selective

way of reading and analyzing this sentence, as it may reveal some important issues that are particularly relevant to the subject of study (Gibson & Brown, 2009).

Regarding the second stage of more focused transcription, there was analytic awareness to examine how things were uttered in an interview. First, I highlighted recurring features of speech, and tried to mark sentences that delivered similar meanings and those I thought particularly relevant to the subject of research. While this step cannot be regarded as a coding step that classifies data into categories with particular descriptive meanings, it did at least involve producing ‘selective aspects’ of data and constituted a basis for later performance (Kowal & O’Connell, 2013, p. 66). Next, I left the transcript for a few days and then read it. When I came back, if I did not read and understand a sentence easily, I was sure that I wouldn’t understand it for later analysis. So, I reviewed and modified the versions until they flowed naturally. In the process, I also started my detailed analysis. The two stages of transcription resonate with Silverman’s (2017) idea that ‘it should not be assumed that the preparation of transcripts is simply a technical detail prior to the main business of the analysis’ (p. 343). During the process, transcription allowed me to develop some initial understandings of the participants’ meanings and their experiences through texts.

Furthermore, translating from one language into another is another crucial step to ensure the credibility and quality of the data. Most interviews were in Chinese, though a few were in English, but I did not rush to translate all the data into English versions; instead, I transcribed most of the interview data in their original language and then translated those in Chinese into English, especially when I needed to show my work to my supervisors during the analysis process. It is suggested that translation involves ‘the construction of meaning’, since it involves more ‘subtle issues of connotation and meaning’ (Marshall & Rossman, 2015, p. 111). A translator, in this sense, is ‘actually an interpreter who processes the vocabulary and grammatical structure of the words while considering the individual situation and the overall cultural context’ (Esposito, 2001, p. 570). This required the researcher to be more careful to translate ‘as literally as possible’, ensuring that meanings were not missing from the translation process (Resch & Enzenhofer, 2018, p. 139).

I read and re-read the transcripts and comprehended what the interviewees actually talked about. Second, I selected an excerpt of an interview transcript, such as one or two paragraphs, for pilot translation. This helped me to start experiencing and learning how to move from Chinese to English. I noticed that Chinese is a Sino-Tibetan language while English is a West Germanic language, so I paid close attention to phrases and key words I marked during the transcription process and sought ways to represent them in a comprehensive way. According to Venuti (1995), translation requires decisions to comply with the conventions of the target audience, but this carries the risk of losing precise meanings in the original language. Especially when there was no direct translation of phrases and words into English, I chose to retain and highlight those in the original Chinese language, serving as a reminder for later analysis. After

gaining a sophisticated understanding of what the data actually talked about and how they related to other pieces of data, I carefully chose words that revealed the meanings that the participant wanted to express.

Furthermore, in order to ensure the quality of translated data, I sought advice from my friend who was doing doctoral research in Linguistics, at Lancaster University, particularly focusing on Chinese-English Translation. She was capable of making some suggestions and giving some advice on particular words and phrases I found challenging to translate. Concerning ethical issues, I strictly adhere to the ethical regulations of Lancaster University, i.e. do not disclose interview transcripts to any third party or the public directly. I was given ethical approval to conduct this research by the FASS-LUMS Research Ethics Committee (FASS-LUMS REC).

3.7 Ethical Concerns

This section discusses the ethical concerns of this study, an issue which ‘pervades every aspect of the research process from conception and design through to research practice, and continues to require consideration during dissemination of the results’ (Goodwin et al., 2003, p. 567). While this study is considered to be low risk, as it does not directly ask sensitive issues and risks no harm to the participants in any way, there are some ethical elements that had to be seriously considered.

In accessing the participants and building positive relationships with them, as I have already discussed, I respected the decisions made by every potential participant and ensured everyone had an opportunity to ask questions about the research before it started. I provided all relevant documents for their inspection, including a consent form, a personal information statement, a letter of invitation and an advertising letter, which were approved by the FASS-LUMS Research Ethics Committee. Especially, the consent form and personal information statement provided detailed information about possible opportunities and risks of participation in the interviews. They also noted interviewees’ right to withdraw from an interview if they later felt uncomfortable (Wiles, 2012). Another key ethical consideration is the control and use of data by the researcher. It is commonly assumed that the researcher has the right to publish or circulate research outcomes, but this involves issues of confidentiality and anonymity (Hammersley & Traianou, 2012). The researcher must protect the privacy of interviewees and use alternative names and organizational codes (Wiles, 2012). I highlighted this issue prior to each interview and sought permission from every interviewee for my protective way of presenting data.

3.8 Conclusion

This chapter has presented key methodological decisions taken in the research process before data analysis. As addressed at the beginning of the chapter, there is no cookbook for an interpretivist study, because appropriate answers to research methodology and method considerations largely depend on the particular nature of the phenomenon under study, the theoretical perspective adopted and the research aim being addressed. In this chapter, I have demonstrated how each crafted step was consistent with the elements above, instead of simply following conventional norms. Now I specify five distinct and key components of the research design prior to the stage of data analysis. First, there are inter-subjective and interpretivist approaches in relation to inter-relational experiences of followership grounded in participants' understandings and interpretations of their contexts. Second, I employed a single interpretive case study to capture rich data about followership. Third, access to the organization and the participants was important to acquire multiple viewpoints of the participants about my research. Fourth, semi-structured interviews were conducted to generate descriptions and understandings of participants' experiences of inter-relations in specific contexts. Finally, transcription and translation were employed in a preliminary stage of understanding and analyzing the data. Based on these steps, the next chapter moves on to introduce the inductive analysis process employed, by explicating four major steps, from producing codes, categories and themes to theoretical understandings.

Chapter 4: Data Analysis

4.1 Introduction

In this chapter, I reflect on my inductive data analysis process. Data analysis is a critical stage of the research process, involving decisions about organizing and capturing participants' descriptions and interpretations that align with the research objective and the theoretical and philosophical positions of the study. Unfortunately, data analysis is often viewed as 'the black hole of qualitative research' (Lather, 1991, p. 149). So far there is very limited followership research specifically explaining how it moves from raw data to theoretical understandings. Underpinned by an interpretivist stance, I do not simply follow any of the mechanical ways used in the current followership and leadership work, but instead craft 'appropriate' steps, with the aim of providing a robust and compelling interpretation of empirical data.

Broadly speaking, I utilize an inductive approach to data analysis, that is, I get closer to participants' descriptions and understandings in the first place and develop interpretations of their meanings later. The most important reason why I take this inductive approach is its high suitability for the research objective, philosophical and theoretical positions of this study. Chapter 3 (Methodology) emphasized that this followership study is deeply rooted in inter-subjective ontology, describing the nature of followership as inter-relational experiences, and an interpretivist approach to develop 'bottom-up' interpretive understandings that are empirically grounded in the participants' contextual experiences (Cope, 2005, p. 167). An inductive approach is particularly well suited, as it produces themes and theoretical understandings that are 'grounded in the data and are not given a priori' (Lincoln & Guba, 1985, p. 344). Accordingly, I can understand followership from the standpoints of the interviewees, i.e. financial assistants, financial analysts and managers, from which to articulate their interpretations of inter-relational experiences as complexities of followership.

Data analysis, in this study, is an iterative process instead of a linear one. The four analysis steps shown in Table 4.1, below, appear to be tidy and straightforward, but they experienced many rounds of clarification and modification until achieving a robust and compelling interpretation of the accounts. Initial understandings of followership were often redefined in light of new understandings acquired from the data, and those new understandings were again subject to further enquiry in terms of the research objective and theoretical and philosophical stances. Openness and flexibility were essential to pursue the contextual and multiple nature of descriptions and interpretations of those whose inter-relational experiences were being

studied. In this way, every step of the analysis process can be viewed as ongoing and interdependent. Presenting a list of analysis steps is more than a mere description of what I have already done; rather, it reveals the issue of 'how' I move from an empirical level to a theoretical one. In order to present my analysis process as clearly as possible, in the following I draw on rich examples to illustrate how my analysis progressively developed.

Table 4.1: Steps of Interpretive Data Analysis

Step	Description
Developing emergent codes	Hundreds of emergent codes are developed to describe and summarize the participants' meanings. Most of the codes are directly borrowed from the participants' quotations; other codes are elaborated and amplified based on the participants' interpretations.
Developing categories and subcategories	Categories and subcategories are developed to build connections and linkages between emergent codes. Most of the categories are directly drawn from the participants' quotations.
Creating and reviewing themes and sub-themes	Four themes are developed to organize categories and subcategories into clusters of more abstract ideas that summarize the underlying assumptions of the participants' descriptions and interpretations. Meanwhile, relevant narrative accounts are linked with corresponding themes and categories, in order to help check whether the connections between elements (themes and categories) and empirical data are strong enough.
Developing a theoretical understanding	Theoretical understandings are created and developed to address two research questions and extend existing followership concepts and insights.

4.2 Developing Emergent Codes

The first step is to develop emergent codes, constituting ‘descriptive meanings’ of the participants’ accounts. There are diverse methods of coding including ‘grammatical methods’, ‘elemental methods’ and ‘affective methods’ (Saldana, 2009, p. 59), which I am not going to explain in detail. As Patton (2002) suggests, ‘because each qualitative study is unique, the analytic approach used will be unique’ (p. 433). The term ‘unique’ here means that the coding process should be conducted in terms of the assumptions underlying a study. As noted in the introduction, the research objective and philosophical and theoretical positions play a critical role in capturing and developing meanings of the followership under study. Especially underpinned by an interpretivist stance, my coding process makes sense of and organizes codes in terms of what participants talked about during their interviews. That is, a key criterion of my coding is to get closer to participants’ viewpoints and understandings as much as possible, instead of using my own personal knowledge and opinions, with the aim of developing the participants’ interpretations of their inter-relational experiences.

Accordingly, I rejected using predetermined codes from the literature. The current followership work appears to straightforwardly direct me how to understand the data, but it carries the danger of removing codes from their original contexts. As Silverman (2017) advises, ‘remember that no meaning resides in a single unit and so everything depends on how your units fit together’ (p. 323). A code does not exist independent of its relation to other codes, data and the original context where participants are embedded. If I was using a list of start-up codes from existing studies, such as Carsten et al.’s (2010) work that identified key codes including ‘loyalty’, ‘expressing opinions’ and ‘proactive behaviours’, I might fail to understand what my participants experienced and talked about in their distinct contexts. Notably situated in physical and non-physical contexts, followers’ inter-relational experiences may contrast sharply with what has been described so far, because Carsten et al. (2010) only consider the role of a physical context and its effects on followership. Hence, in the process of coding, I kept asking myself an important question: are the descriptive codes drawn from the participant’s descriptions? If not, I went back to the raw data and redefined codes that were representative of participants’ meanings.

In order to get close to participants’ contextual meanings, my coding aims to seek and retain ‘contextual connections’ between actual data. It is argued that when coding, as a means of sorting data, it is dangerous to separate some data from other data based on a similarity-based strategy (Maxwell & Chmiel, 2013). To identify similarities and differences, researchers often capture resemblances or common features of data, overlooking ‘actual connections between things in actual context’ (p. 22). Yet, Maxwell (2004) suggests understanding ‘juxtaposition in time and space, the influence of one thing on another, or relations among parts of a text’ (p. 462). This means that I do not merely capture a summative attribute for a portion of

interview transcripts, but also make sure that each summative code retains a degree of 'contextual' meanings, which describe inter-relational experiences of the participants. Two strategies are involved. The first strategy is to make use of participants' own words and concepts to create codes. For example, being asked about perspectives on working with peers in the same workplace, one assistant said: *'We feel like friends. Very comfortable!'* I used the code *'comfortable friendship'* to stay close to the participant's own meaning and did not introduce any prior knowledge. The code refers to a particular kind of inter-relations, i.e. friendship emerging among financial assistants, not with leaders.

My second strategy is to elaborate and amplify the meanings implicit in their descriptions. According to Coffey & Atkinson (1996), codes can 'expand, transform, and re-conceptualize data, opening up more diverse analytical possibilities' (p. 29). Some contextual meanings are not directly related to participants' terms, but instead refer to what implicit meanings an issue has for participants. To take another example, an assistant commented: *'I heard from others that the number of cameras will increase to each corner of an office next year. Oh my God!'* This account describes the fact that the number of cameras would be increasing in this physical workplace in the near future. More importantly, the sentence *'They (analysts) could see us from each angle'* reveals that the assistant and other peers were very aware of the increasing number of cameras and might feel a sense of pressure and uncertainty regarding the near future. Accordingly, I used two codes. 'increasing number of cameras' and 'growing pressure', to summarize the meanings underlying the account. In this case, the participant's feelings about cameras were not self-evident but required the researcher to understand how these were expressed in the data.

A third strategy for retaining contextual connections between data is to assemble relevant codes from different participants' accounts together to see 'multiple aspects' of an issue. It is not appropriate to see each interview account as an independent entity in its own right, because there are 'substantive relations' about how actors inter-related to each other (Dey, 1993, p. 152). This is consistent with an inter-subjective ontology that assumes 'realities' to be multiple, dynamic and complex, rather than single and coherent. So, it is critically important to see how different participants elaborated one issue from diverse perspectives. To continue to discuss the example of *'friendship'* above: I started one participant's account at the beginning and identified an issue or code the participant thought important from his or her contextual experience; next, I did not close the code based on this individual account but sought to see how other participants made sense of the issue; as a result, I collected multiple accounts of the same issue and summarized and interpreted the meanings underlying the issue. In this way, *'comfortable friendship'* serves as a guiding code and three other codes, *'no senior-junior'*, *'no interest conflict'*, and *'did tasks independently'*, were identified as explanatory codes of elaborating why and how peer friendship occurred. In this way, the codes are helpful in constituting a rather 'comprehensive answer to the issue of 'peer friendship'.

After several rounds of coding, I developed a table to represent three important elements of coding: data extract, representative code and code description. In the middle column is the representative code; the left column shows interview transcripts that are relevant to this code; the right column describes basic meanings of the code. In the second row, two code labels are used to describe how financial assistants perceived the education degrees of financial analysts. This is because one single code cannot fully capture the contextual meanings of parts of interview transcripts. Especially at this initial data analysis stage, it is reasonable to use more than one code for text parts, showing more clues how to develop further insights in later stages.

Table 4.2: Examples of Codes and Code Description

Data extract	Coded for	Code description
<i>'If I can see the facial expression (eye contact and smiles), then I can judge whether he (the analyst) agreed with my opinion or not; I can also see nods, or a shaking head'</i>	Non-verbal signals	Non-verbal clues such as facial expressions, a nodding or shaking head, help assistants to understand the meanings of their managers.
<i>'Like my analyst, he has seven degrees from MIT, a genius. His background is automation in industry and display panels. Seven degrees! He learnt finance latter, not initially. In my view, for this field, it requires a strong education background, especially for those on-shore. At least being a graduate from HKUST and ZJU, this is the worst. But for our part, we are lower than them, although we have good degrees. A degree is a fixed threshold, very difficult'</i>	Extraordinary education background; Degree as a fixed threshold;	An education degree was perceived as a 'gap' that the assistant felt difficult to bridge. It was also considered to be an important aspect via which analysts were believed to be very capable of doing analysis work.
<i>'I heard from others that the number of cameras will increase to each corner of an office next year. They (analysts) could see us from every angle. Oh my God!'</i>	Increasing number of 6.cameras; Increasing pressure;	Increasing numbers of cameras in office corners made the assistants feel stressful.
<i>'We are young people, and the age difference is less than five years. We communicate with each other very easily. Also, we have studying aboard experience, so we have lots of hobbies in common'</i>	Similarities in personal characteristics	The assistants perceived similarities in ages, study experience and hobbies, which are important elements shaping their strong personal connections.

4.3 Developing Categories and Subcategories

The second step of data analysis is to develop categories and subcategories, establishing interconnections and linkages between codes. There is a distinction between coding and categorizing here. In the first step, my coding strategies are very similar to ‘open coding’ (Strauss and Cobin, 1990), examining texts for salient meanings attributed by the participants. This step of developing categories has some resonance with ‘axial coding’, a process of allocating codes into categories by making comparisons (Strauss and Corbin, 1990). It is argued that interconnections are not easy to identify: ‘when we chop them (interview transcripts) up into separate coded segments, we are in danger of losing the sense that they are accounted’ (Coffey & Atkinson, 1996, p. 52). New categories may replace original sets of contextual relationships in raw interview transcripts in a different structure, leading to ‘neglecting the actual relationship’ between participants in their specific contexts (Maxwell, 2004, p.16). To reduce such a risk, I kept the research aim of this study in mind. My categorizing strategy is not just to resort to putting initial codes into discrete categories, but also to understand that ‘interconnections’ among categories should be located in a real context, revealing inter-relational dimensions of what participants talked about.

The first strategy is creating and defining ‘manifest’ categories and subcategories in terms of the participants’ terms and concepts, instead of my own words. The interconnections established among a set of codes are not just to retain them, but to reveal what ‘actual relationships’ exist for the participants in specific contexts within the codes, instead of relations in terms of superficial similarities and differences in codes. For instance, I used the participants’ term ‘*promote response speed*’ as a category to integrate a set of codes, including ‘*exclamation mark*’, ‘*quick response*’ and ‘*every minute counts*’. This category concerns a particular inter-relational way that the assistants presented themselves to remote analysts in a non-physical context. The codes represent different ways that assistants made contact by email or telephone. In this way, the category tied codes and relevant data into an integrated whole, putting them into original contexts.

The second categorizing strategy is to create ‘latent’ or ‘indirect’ representations by making sense of underlying meanings in locally produced descriptions and experiences, especially when I was unable to find appropriate participants’ terms to serve as categories or subcategories. For example, in terms of codes such as ‘*provide limited guidance*’, ‘*provided guidance only available*’, ‘*no guidance provided*’ and ‘*encourage self-learning*’, they collectively reveal a situation in which many remote analysts did not provide adequate feedback and guidance on assistants’ performance and tasks. To explore the reasons why, one assistant said, ‘*My analyst did not want to waste every minute on my questions*’ An analyst gave another explanation: ‘*I do not necessarily answer their questions, because learning by themselves is basic*’ and ‘*I will answer questions when I think it is necessary*’. Referring back to these accounts from different participants, I recognized a deliberate sense of limiting support and feedback to assistants, hence I used the

category of *'reluctant to provide support'* to highlight this issue. In this case, while the category was not directly associated with the participant's term, it specifically addressed what was experienced and perceived by the participants.

The third categorizing strategy was to create two different sets of categories to retain contradictory meanings within those codes. This is consistent with my purpose of categorizing, analyzing and establishing the connections made between actual data themselves, rather than between codes. As my interpretivist stance argued previously, all my interpretations should be contextualized, referring to what participants perceived and experienced in their own contexts. Some accounts show two opposing ways in which assistants related to remote analysts. For example, when the assistants discussed how they responded to analysts' emails and telephone calls, they *'provided timely responses'*, while in the meantime they chose *'delayed response speed'* and even *'recreated at own speed'*. I used two categories in parallel: *'promoting response speed'* and *'delayed response speed'* to highlight contradictory situations. Developing categories, therefore, is not merely a process of grouping some things together, but allowing data to continuously reflect their own contextual meanings.

Refining categories are also necessary, in order to ensure that each datum and code are allocated to appropriate categories. If not, I re-read the text and re-allocated codes into a different category. In this step, I recognized that categories initially created became redundant and the interconnections between codes and categories were weak. For example, after a first round of allocating codes into preliminary categories, I recognized that accounts relating to the code *'delayed response at the weekend'* were missing from the category *'delayed response speed'*. Only one assistant mentioned this in two short sentences, while most assistants focused on other strategies. This does not mean that I should ignore this, because *'delayed response at the weekend'* is a good illustration of how assistants strategically delayed their responses to remote analysts on mobile phones. Hence, I re-allocated the missing text into the category; at the same time I highlighted this code, because the strategy appeared to be not pervasive among assistants.

Table 4.3 emphasizes the relations among categories, subcategories and codes. In the left-hand column, the codes helped me to focus on specific features of the data; in the right-hand column, the example quotes formed a context from which to understand what the data and representative codes described. Based on the quotes and codes, I needed to look very closely at the underlying meanings and create subcategories or categories as *'interconnections'* among codes, revealing contextual meanings of how the participants inter-related to each other in particular ways. So, codes and categories were combined with direct quotes to achieve an understanding of participants' descriptions and meanings that neither could provide alone. The table also highlights that categorizing and coding involve an iterative process of moving forwards and backwards. I needed to constantly pay attention to the research aim and provisional research questions, in order to do my analysis and interpretation in a reasonable way.

Table 4.3: Example of Codes, Subcategories and Quotes

Codes	Subcategories	Example quotes
Exclamation mark; Quick response; Every minute counts;	Promote response speed	<i>'I often received emails entitled 'urgent', adding an exclamation mark. The telephone is also like this. He required me to give a response in ten minutes. I had to do it very quickly, to find something that was impossible to find. I felt every minute counted'</i>
Delayed response at the weekends; Classify emails in terms of urgency;	Delay response speed	<i>'No, at the weekend I often responded after hours'</i> <i>'Sending emails needs categorization. I will see which are most urgent, which are less so. I can only reply to one at a time, so it is important to consider the importance of emails'</i>

4.4 Creating and Reviewing Themes and Sub-themes

Having established my categories, I was in a position to look for themes emerging in the data. A theme refers to something broader or more abstract than a code or a category, it ‘runs right through data and is not necessarily confined to specific segments of text’ (Morse & Rochards, 2002, p. 121). In this study, I treat a theme as establishing a primary relationship among a set of categories, and categories are regarded as ‘types’, ‘factors’ and ‘ways’ of constituting a corresponding theme. After being refined and organized, a category becomes a sub-theme under a key theme. The relationships between themes and sub-themes represent underlying meanings and assumptions of the data (Attride-Stirling, 2001), especially retaining the connection of the theme to its original context (Ayres, 2008). According to the primary research objective, creating themes in terms of my categories requires identifying the inter-relational experiences of the participants. Put differently, all themes reveal how the participants inter-related with each other.

For instance, I created the theme ‘*Managing Surveillance*’ to summarize the ‘ways’ remote analysts and managers conducted two forms of surveillance (*camera surveillance* and *managerial surveillance*, as two sub-themes under this theme); this theme also illustrates the diverse ways in which assistants coped with surveillance. This required many rounds of reading and re-reading categories, codes and relevant accounts dispersed throughout different parts of the data set, instead of one single part. By identifying this theme, I enable the reader to concentrate on particular types of relationships that were constructed and reconstructed between financial assistants and remote analysts, between assistants and managers, in terms of surveillance.

In contrast, the theme of ‘*Managing Presence*’ shows a different type of assistant’s inter-relational experience. The theme does not show how assistants and other actors engaged in monitoring and being monitored issues, but highlights the ways assistants made efforts to create and navigate their presence in a non-physical context by making use of email and telephone. I identified two categories, ‘*providing a timely response*’ and ‘*matching working hours*’, which reveal two active and proactive ways in which assistants presented themselves, rather than more or less passively accepting and coping with surveillance by other actors. At this point, this theme of ‘*Managing Presence*’ is more than a summary: a summary of data provides a mere description of what was happening, while a theme tells the reader something specific or underlying about what was happening. As suggested by Braun and Clarke (2016), a theme ‘captures the core point of a coherent meaningful pattern in the data’ (p. 4). The themes ‘*Managing Presence*’ and ‘*Managing Surveillance*’ imply underlying drivers and outcomes of inter-relational experiences of followers.

Moreover, after identifying themes, I went on to review them and rename sub-themes, in order to make them focus tightly on a particular theme. For instance, the sub-themes '*Providing Timely Response*' and '*Matching Hours*' explicitly identify two major ways of '*Managing Presence*'. By this point, I ensured that these two sub-themes stayed close to what actually happened and did not become an abstract and disconnected concept. The process of reviewing themes and sub-themes was time-consuming, and this analysis was inevitably influenced by the researcher's perspective and understandings. As discussed previously, a crucial criterion to ensure the quality of my interpretive analysis is to establish and reinforce strong consistency among the philosophical and theoretical positions and the research objective. This issue is particularly pertinent in the process of creating themes, because themes do not just reflect empirically grounded data, but also constitute the meanings and interpretations that this study is primarily interested in. In the process, I recognized the importance of inviting my supervisors to discuss and evaluate each theme with relevant categories and codes. Their comments and suggestions on each theme contributed to producing a comprehensive understanding of my data.

Table 4.4: Reconfiguration of Subcategories into Themes and Sub-themes

Subcategory	Sub-theme	Theme
Work experience Professional ability Education background Cultural background	Building up trust	Establishing Productive Work Relationships
Answer questions and give feedback Engage in central tasks Reluctance to provide feedback and support Dominate key decisions Issue strong critiques Manager support	Sharing knowledge	
Facial expression Body language Email text Telephone voice	Using non-verbal clues	
Managers' responsibilities Normal working practices Provide support only when called upon Empowerment	Managerial surveillance	Managing Surveillance
Door cameras Office cameras Hiding bags Escaping office cameras	Camera surveillance	

Promote response speed
Delay response speed
Classify emails
Shifting from telephone to email in advance

Providing timely response

Managing Presence

Matching start and finish times
Overworking till midnight
Work at the weekend
Insert personal activities during work
Play tricks

Matching hours

Similar age, education, background and hobbies
The nature of work

Perceived similarities

Cultivating Belonging

Mutual support
Comfort each other
Reproduce informal norms

A sense of community

Distinction between real friendship and workplace
friendship
Specific skills and abilities
Different education background

Not feeling part of the group

4.5 Developing a Theoretical Understanding

Develop a theoretical understanding of followership is the final step of my analysis. As stated previously, the aim of my interpretive study is to access participants' descriptions of their particular ways of inter-relating to each other, elucidating these as carefully as possible and communicating meaningful interpretations to the reader. It should be noted that my interpretation is 'not objective reality', rather 'an interpretation of an interpretation' (Leitch & Hill, 2015, p. 237). This means that the interpretive researcher should provide a 'detailed, compelling and powerful' account of evidence to allow the reader to determine whether a story or theoretical understandings developed are faithful or not (pp. 237–238). In my analysis process, direct interview quotes, codes, categories and themes were used to constitute the fundamental material of theoretical understandings of the followership phenomenon.

An important issue that emerged from this stage was a complex relation between data and theoretical understandings. Some suggest the importance of referring to previous theoretical insights or existing knowledge, as 'the world is always perceived through the lenses of some conceptual network or other and they provide an ineliminable tint to what we perceive' (Laudan, 1977, p. 15). Indeed, taking a critical approach to studying followership has already informed a particular way of thinking about my data, by having an appreciation of followers' inter-relational experiences with others in specific contexts. However, using too precise definitions and hypotheses from prior studies may overlook the possibility of articulating understandings from empirical data (Becker, 1988). The researcher should instead put herself 'in the position of the subject who tries to find his or her way in this world' (Shaw, 1966, p. 3). In this study, a critical perspective is more concerned with being open to look at situated participants, actual contexts and the ways they actually inter-related to each other, rather than a theoretical lens limiting my understandings of a situated phenomenon.

After a process of accumulating codes, categories and themes, I gradually recognized that 'Follower-Leader Distance' can serve as an explanatory lens through which to theoretically understand meanings of follower-leader relationships and followership contexts, which are constituted as two aspects of followership complexities. There was no specific intention to focus on this issue during the research design process, but the way in which participants understood and made sense of how this could be interpreted as it had appeared. This means that their accounts provide empirical inspiration for developing a theoretical understanding of followership in terms of follower-leader distance. Several steps were involved in this process. First, I re-read the empirical data again and was inspired by certain accounts that mentioned different dimensions and degrees of distance. For instance, when an assistant, Zhou, described her relationship with an analyst, she noted that: '*the distance impeded the efficiency of our communication*'. Here *distance* was not just used to describe the relationship with a remote analyst, but also relate to the

geographical constraints between them. The second example is from Kin who summarized his relationship with an analyst: *'we have a sense of distance, because we grew apart from each other.'* Linking with the context of the sentence, I recognised that *distance* here was more about a subjective experience, i.e. a feeling that the analyst was far away from the assistant himself. Here is another example: an assistant linked *distance* with formal structures and positions: *'there is a very great distance from my analyst. This is about our ranks.'* Distance was linked with a hierarchical sense of positions, and the term 'great' denotes a degree of separation. Hence, these accounts demonstrate the need for critically thinking the nature of distance between followers and leaders.

The second step was to interpret the relationship between the emerging concept and the research questions and refine the concept of follower-leader distance. It is important to note that while physical, psychological and structural dimensions of distance are recurring in the raw data, the researcher cannot use them directly to interpret data, but considered very carefully the nature of research problem to be investigated and thought through how the concept may most appropriately be understood in the particular case (Leitch & Hill, 2011). As stated previously, the research questions informed of a focus on follower-leader relationships and contextual issues, which required me to capture and describe how the participants interpreted inter-relational experiences. The emerging dimensions and degrees of distance should be understood in a followership orientation, i.e. how followers constructed and reconstructed the distance with formal and informal leaders. After a round of close reading and analysis, it became clear that there was a very level of agreement on the significance of distance across different participants' accounts. For instance, a psychological dimension was captured to refer to subjective perceptions of feelings close to or far away from someone. I rejected naming the category as emotional dimension, because it particularly refers to intense and intuitive feelings such as anger, fear, sadness and guilt. Unfortunately, the available data does not denote these emotional aspects, but show how participants neutrally describe their subjective distance with others. Another example is the data related to category of structural distance, where the participants talked a lot about differences experienced arising from asymmetric structures, positions and surveillance. Leadership scholars often conflate the term with social distance (Antonakis & Atwater, 2002; Shamir, 1995), but I suggest making a subtle distinction between them based on the accounts. Being more specific than social distance, the category of structural distance I used is particularly helpful to highlight the conditions of a degree of formal relationships existing between followers and leaders, which needed for further exploration of its potentially processes and outcomes.

In a similar manner, the degrees of distance, i.e. closeness and separation, were captured according to contradictions of distance were located in the follower-leader relationships. Under each dimension related to a part of texts, I see that the interplay between the closeness between followers and leaders and the separation between them, giving me a complicated view of the dynamic and fluid nature of relationships. For instance, while financial assistants expressed the desire of moving closer to remote analysts and

learning skills from them, they did not hide the feelings of moving away from those analysts, as they did not perceive similarities from them, but deeply experienced ‘inaccessible gap’ in terms of large differences in knowledge and education background. The texts, in this sense, appeared to express the interdependence of both closed and separated relationships where participants were in continuous movements towards each other, and neither of them were finalized at certain points of relationships.

Finally, after this time-consuming conceptual definition and analysis, we checked all the text allotted to individual categories and ensured that the allocation of every piece appeared suitable. If not, I went back to the data and re-allocated the data to a new category. This practice is similar to the ‘theoretical sensitivity’ used in the grounded theory approach, in that researchers remain sensitive to the data and have the ability to develop theoretical insights into the data (Strauss & Corbin, 1990). A critical perspective played an important role here, as it enabled me to have a clear mind how to conceptualise a piece of data from a dynamic and followership perspective. I went beyond merely reporting and describing what participants did, by constructing a meaningful narrative of follower-leader relationship in physical and non-physical contexts, and adding new insights into the existing body of literature on followership as well.

4.6 Conclusion

In this chapter, I have presented four steps of data analysis. As followership is a multiple, inter-relational and dynamic phenomenon, I contend that analysing and interpreting the phenomenon should be conducted in a robust and systematic way. Although quality for an interpretive study cannot be defined in terms of a set of fixed rules and criteria, my data analysis process has responded to a call for a better interpretive research by elaborating and justifying every key decision made. Of course, the process of data analysis is not linear but recursive, involving much dialogue between the researcher’s interpretation and the participants’ descriptions and understandings. I was constantly aware of how the data informed the creation of codes, categories, themes and theoretical concepts; meanwhile, I primarily focused on the primary research objective, philosophical positions and theoretical perspective, which provide a broad direction as to how to interpret the data.

For the purpose of producing empirically grounded interpretations and understandings of followership, I began the analysis by creating hundreds of codes that represented the meanings of the participants’ descriptions and perceptions. I then sought to group them into categories and subcategories with the interconnections being substantive in relation to how the participants actually related to each other. Next, I identified themes that represented the underlying meanings of categories and subcategories, linking all relevant data into an integrated whole. Finally, I developed a theoretical understanding by identifying

underlying linkages between the themes, aiming to provide a coherent and compelling interpretation about follower inter-relational experiences in two contexts. Thus, Chapter 3 and Chapter 4 have dealt with the fieldwork design and analysis, laying the foundation for the next two chapters. In Chapter 5, I move on to present the key findings of this study, based on actual data quotes and themes. In Chapter 6, I group the themes into an integrated whole, moving towards establishing a comprehensive theoretical understanding of followership.

Chapter 5: Findings

5.1 Introduction

This chapter presents the key findings that emerged from the empirical data. It shows the participants' experiences of inter-relating with each other in physical and non-physical contexts, drawing upon four themes, ten sub-themes and hundreds of codes. The chapter is underpinned by the primary research objective, i.e. to explore followership in two specific contexts. It is also grounded in a philosophical position, i.e. to understand followership as inter-relational experiences, which can be accessed and interpreted through participants' descriptions and interpretations of their situated experiences. My analysis thus tries to generate and present findings that are consistent with the research aim, and philosophical stance. In this chapter, I structure the chapter around four major themes, as shown below, and I will discuss each theme in turn, referring throughout to direct quotations from the participants' accounts.

Theme I: Establishing Productive Work Relationships

Theme II: Managing Surveillance

Theme III: Managing Presence

Theme IV: Cultivating Belonging

5.2 Theme I: Establishing Productive Work Relationships

Financial assistants, remote analysts and managers talked a lot about how they constructed work relationships in physical and non-physical contexts. *Work relationships* included not just assistants' daily data collection and analyses for remote analysts, but also assistants' physical interactions and communications with managers in the same workplace. Their accounts reflected '*productive*' forms of work relationships, in terms of being collaborative, engaged and positive. Their accounts also revealed *unproductive* forms of work relationships, in terms of being unsupportive, disengaged and negative. In this section, I interpret the theme using three sub-themes, comprising three major ways of constructing productive and unproductive work relationships between assistants and remote analysts, between assistants and managers. They are *Building Trust*, *Sharing Knowledge* and *Using Non-verbal Clues*, which are structured as three subsections below.

Sub-theme: Building Trust

This sub-theme relates to how assistants developed trust and distrust towards remote analysts, so as to shape productive and unproductive relationships. Trust, emerging from empirical data, refers to assistants' positive expectations that their analysts could be relied on. Distrust, based on available evidence, refers to assistants' negative expectations that their analysts could not be relied on. Under this sub-theme, I present four important drivers of building trust and distrust in remote analysts, namely, the work experience, professional ability, education background and cultural background of analysts.

First, work experience and professional ability facilitate assistants developing trust. A typical instance mentioned was about Lin: she recognized the analyst as '*competent*', based on his rich industrial work experience and desired to '*learn from him*' (LIN 1). In a similar manner, Hai said: '*his (analyst's) research methods and writing reports, compared with other analysts, is perfect. He never made mistakes and mastered every detail very accurately. At the beginning, I really expected him to guide me*' (HAI 1). Professional ability and skill in writing up reports concern a key driver of building trust. Both these assistants firmly believed that their analysts could '*guide*' them and they could '*learn from*' these analysts; in this way, they had positive expectations towards their analysts.

Second, education background enabled some assistants to rely on their analysts. This was evident at the very beginning of some work relationships. When Hai had just started to work with an analyst, he was attracted by the analyst's extraordinary education background: *'like my analyst, he was a genius. No one can do things better than him. I want to learn as much as possible from him'* (HAI 2). During the interview, he passionately mentioned *'seven degrees from MIT'* many times. Clearly, this education background was so attractive that Hainan certainly created some scope for putting trust in him. Qing also demonstrated trust towards his analyst by referring to his education background: *'I feel, everyone (the analysts) has a strong background. In terms of education background, they are better than me. So, when I communicate with them, I often want to be modest'* (QING 1). He continued to elaborate what *'modest'* means: *'I am always ready to learn knowledge from him and happy to accept criticisms'* (QING 2). The term *'modest'* indicates that the assistant believed his analyst could be relied on and the analyst could guide him to a significant extent. The term also reveals the development of a clear hierarchical relationship, establishing who was in control and who was under control.

However, this extraordinary education background provoked a *'highly unachievable gap'* from the analyst. Hai highlighted that *'he is very special, because his intelligence is above everyone else. I feel it is highly unachievable, there is a gap between him and me, impossible to walk across'*. (HAI 3) He clearly distinguished himself from the analyst in terms of education degrees, and as a result he was unwilling or hesitated to *'ask him (the analyst) many questions'* (NAI 3). Of course, this *'gap'* does not necessarily indicate trust or distrust, it can be seen as normal and even what the analyst might desire this relationship to a certain extent. For this assistant, education background prompted him to rely on his analyst, while at the same time it prevented assistants from moving closer to their analysts by separating them into two different groups.

Third, the analysts' cultural backgrounds both helped and hindered assistants to develop trust towards them. The assistants tended to trust those analysts whose cultural backgrounds were Japan and Taiwan. A Japanese analyst gave Ying *'more comfortable feelings'*, as the analyst was always *'friendly, gentle and polite'* (YING 1). Here, she attributed the reason why the analyst engendered these comfortable feelings to the cultural environment where the analyst was located. She implied that a set of beliefs and behaviours (e.g. friendly, gentle and polite) in Japanese culture might positively influence analysts' behaviours. Kant also noted that Japanese analysts could be relied on, because they were *'very friendly, nice, pointing out mistakes kindly'* (KANT 1). Interestingly, she compared them with those from Hong Kong: *'They face a high pace of life and high pressure there, so they focus more on work. This caused them sometimes to lose their tempers'* (KANT 2). She identified cultural signals, *'a high pace of life'* and *'high pressure'*, as influential on analysts' behaviours; in this way, she put her trust in Japanese analysts, instead of those from Hong Kong.

It was also found that the assistant demonstrated distrust towards analysts from South Korea. Han claimed that: *'Koreans treats human as tools, they do not respect them. They don't explain why, they just expect you to be fully obedient'* (HAN 1). In her view, the Korean analysts were deeply influenced by their cultural environment, where high levels of asymmetric control and deep loyalty exist. Bligh (2017) explains that one who trusts may privilege 'culture-consistent signs' and downplay 'inconsistent ones' in the process of evaluating an unfamiliar partner. Here, I cannot provide a conclusive explanation, as the available data only offer a glimpse of what happened, instead of indicating why. What I can infer is that cultural background was an important driver of trust and distrust, allowing assistants to move closer to or away from their analysts. Viewed collectively, four sources of trust and distrust served different functions for work relationships between assistants and analysts, i.e. professional skills, work experience, education background and cultural background. The first two sources, i.e. professional skills and work experience, enabled assistants to build trust to a large extent, while the last two, i.e. education and cultural background, produced contradictory experiences in some instances.

Sub-theme: Sharing Knowledge

This sub-theme relates to assistants' experiences of exchanging finance-related knowledge with remote analysts and managers, and consequent shaping of productive and unproductive work relationships. *Knowledge*, drawn from their accounts, refers to opinions and judgement on financial markets and technical information (e.g. format and grammar of analysis report). The participants revealed three positive and productive ways of sharing knowledge with remote analysts: 1) analysts *'answer questions'* and *'provide feedback'*; 2) analysts invited assistants to *'engage in central tasks'*. There are three ways pointing out that sharing knowledge was not always productive, as many analysts: 1) *'became reluctant to provide feedback and support'*; 2) *'dominated the key decisions of reports'*; 3) *'issued strong critiques'*. These experiences prompted assistants to withdraw their questions, learn by themselves or seek help from managers, instead. Concerning the influence of managers, the assistants' and managers' accounts highlighted much more positive and engaged relationships during knowledge-sharing than those with remote analysts.

The first way of *sharing knowledge* is that some analysts were willing to provide feedback on assistants' documents and even encouraged them to challenge opinions. One analyst, John, commented that it is *'important to encourage my assistants to challenge me'* (JOHN 1); his assistant confirmed this point: *'I felt, trust comes from affinity and caring, He is willing to explain why; sometimes, I would ask him questions and he was willing to answer. He also welcomes me to challenge opinions anytime I feel something is not reasonable'* (JING 1). The terms *'affinity'* and *'caring'* imply that they did not just develop effective solutions to financial issues, but also significantly developed a strong sense of personal connection and attachment through their communication. But it is worth noting that such high levels of communication were not commonly found in my empirical data, because most the assistants still struggled with the process of sharing knowledge with their analysts, as will be demonstrated later.

The second way of *sharing knowledge* is analysts' willingness to delegate some decision rights to assistants. 'Central' tasks, unlike 'repetitive' tasks (e.g. collecting financial data and adjusting the formats of reports), required more '*independent judgements and arguments about the data*' (RUI 1). Very few assistants could gain such precious opportunities, but Qing was a lucky one who was allowed to write a central part of an analyst's report. His analyst, Mark, explicitly said: '*I believed my assistant could complete the task and often finished it perfectly*' (MARK 1). Qing responded positively: '*I hope to take up more tasks, and they also expect this. My team is moving towards this goal and I can take up more central, financial modelling tasks*' (QING 3). The analyst expressed strong confidence in the assistant, and the assistant also held a strong conviction in his own ability. This may have been a factor enabling Qing to successfully complete the report. Qing, in this way, increased his self-control over tasks, and established a collaborative relationship with his analyst.

However, some assistants, such as Xiang, increasingly experienced the pressure of doing such 'central' tasks.

'For every report he (the analyst) produced, there are a few mistakes. He also required me not to make mistakes. This is rather stressful, especially when I was required to complete an advanced task. Initially I felt very happy, wow, because this is a huge responsibility. But later I felt very depressed' (XIANG 1)

He used four emotional terms, 'happy', 'wow', 'depressed' and 'stressful', to describe a transition from feeling positive to somewhat negative. The 'stressful' feeling was largely due to the 'huge responsibility', i.e. the analyst had strong expectations in the assistant's ability, but the assistant felt incapable of accomplishing it. He continued to explain why: '*I was like a person who can't speak English but was required to read a book on IELTS reading, overwhelming*' (XIANG 2). He used the term 'overwhelming' to indicate his inability to complete this task, creating a potential challenge to continuing to maintain high levels of collaboration with analysts like Qing. After several failures to present satisfactory reports, the analyst concluded that: '*I had to adjust my expectations from then on.*' The analyst assessed his expectations of the assistant and lowered them to a level that was appropriate for his current ability. In this case, although it began with a negative experience of working with the analyst, it was possible that adjustment and negotiation might enable both parties to continue developing a productive relationship in the long term.

Now I would like to shift the reader's attention towards three disengaged ways of sharing knowledge with analysts, which was seen by the participants to lead to unproductive work relationships. The first form was that many analysts were reluctant to answer questions and provide support. For instance, Hai tried hard to ask questions at the beginning of collaboration but received rejections, so *'Now I don't want to ask him (the analyst) many questions'* (HAI 3). A number of assistants expressed such negative experiences. For example, Kin noted:

'We can't have deep communication. I don't know why I did this task, because he didn't explain why. Sometimes he just gets a glimpse of my ideas, but actually he doesn't use them in his own reports. What is the purpose of asking me to do this and that!'

In the quote, she emphasizes the lack of sufficient explanation and justification for many decisions. Kin explained: *'My analyst did not want to waste every minute on my questions'* (KIN 1). His analyst confirmed this point: *'I don't have enough time to do so. I am very busy every day'* (ZHENG 1). The analyst viewed self-learning as an important skill to be a financial assistant. Kin noted that: *'What I know is what I mostly learnt by myself. My analyst often told me to develop self-learning ability, when I asked a question'* (KIN 2). Self-learning was seen as a necessary and important skill. The analyst supported the idea: *'I do not necessarily answer their questions, because learning by themselves is basic'* and *'I will answer questions when I think it is necessary'* (ZHENG 3). As for the terms *'not necessarily'* and *'basic'*, it can be partly interpreted that the analyst might not view answering questions as part of his job and held different expectations of what a financial assistant's role was. There was another possibility, that the analyst made a deliberate decision to withdraw support. Unfortunately, self-learning did not enable assistants to fully develop valuable perspectives on financial markets. Because *'(the knowledge required is) huge, I have to learn a lot, lots of things, it is really impossible to form a coherent knowledge system'* (TU 1). That is, the assistants appeared unable to learn knowledge by themselves.

Second, in the process of sharing knowledge, most analysts were unwilling to grant any decision rights to the assistants. I have illustrated two cases where some analysts assigned central tasks to their assistants, but this was not normal in the group I interviewed. Rather, most analysts still dominated the main argument of every report. Lan claimed, *'I could propose my points, but the final argument is constructed by my analyst. He doesn't need to persuade me'* (LAN 1). Other assistants frequently used phrases such as *'in charge'*, *'consistent with my analyst's view'* and *'determine direction'* to express similar perspectives. In this sense, they had little doubt that the analysts were the key persons dominating viewpoints in analysis reports. The analysts seemed not want to explain their reasons during interviews. Only one analyst, Tom, mentioned that *'dominating final arguments is normal for every analyst'* (TOM 2). The term *'normal'* here reveals a clear hierarchical relationship, establishing who was in control and who was under control.

Third, the assistants often received strong critiques from their analysts. For instance, Ying complained a lot about her analyst's bad temper: *'His attitude was often very bad, he was very demanding and urgent. I had to bear it and keep silent most of the time'* (YING 2). She also told me that even if she did not make mistakes in reports, she was still questioned and criticized strongly by the analyst. In her view, the analyst maintained considerable levels of doubt and suspicion about her professional ability. To cope with these strong critiques, Ying chose to *'keep silent'*. In contrast, Xue held a different attitude: *'Email is more comfortable, because it is a record. Seventy per cent of misunderstandings were my analyst's fault, for instance, he didn't read clearly, or he didn't understand what the client wanted. At these moments I found previous emails to make him feel not worried'* (XUE 1). It is clear that rather than remaining silent, Xue referred to the history of email replies as evidence to prove that she did not make mistakes; meanwhile, she implicitly questioned the analyst's prejudice or suspicion. Hence, there is a possibility that keeping silent and checking email shaped negative and unproductive relationships between the two parties.

The discussion above presents the issue of knowledge sharing between assistants and analysts that occurred in a non-physical context. Interestingly, those negative and disengaged experiences with analysts stimulated the assistants to turn their attention towards their managers and establish positive and engaged ways of sharing knowledge. For instance, *'The manager helped me to resolve technical problems and I could tell him unhappy stories about the analyst'* (TU 2). Recounting unhappy experiences to managers had become an important way of releasing the pressure and negative emotions in their relationships with the analysts. The managers played a critical role in *'providing support to the assistants'* (XUE 2). At this point, I can see that what the managers provided was clearly different from what the analysts provided. As discussed in the paragraphs above, the assistants expected the analysts to provide professional guidance and feedback on their documents; in contrast, knowledge constituted and shared between managers and assistants was not just about professional financial viewpoints and judgements, but also about personal and emotional experiences.

Sub-theme: Using Non-verbal Cues

The assistants talked about how they employed various *non-verbal cues* to build up productive and unproductive relationships with remote analysts. *Non-verbal clues* can be classified into two parts based on participants' accounts: facial expressions and body language were often used in physical interactions when assistants occasionally travelled to analysts' workplaces, while texts (email) and voices (telephone) were employed when analysts communicated remotely with assistants. In the following I will illustrate how assistants felt and experienced emerging opportunities and challenges arising from the use of non-verbal clues and how they were influenced to develop productive and unproductive relationships with analysts.

First and foremost, physical or face-to-face communication was viewed as an efficient way to develop mutual meanings. One assistant expressed the viewpoint: *'Actually, face-to-face is very important for our work to be conducted. Making a call and meeting a person physically are different, since many things about the person should be felt'* (JING 2). The reason why face-to-face meetings were considered efficient was that: *'I could see the facial expression (eye contact and smiles), then I could judge whether he (the analyst) agreed with my opinion or not; I could also see nods, or a shaking head. But now he wants me to explicitly say "Yes, I see"'* (LIN 2).

In Lin's perspective, facial expressions, such as eye contact and smiles, and body language, such as nods and a shaking head, are important drivers for understanding each other and building up working relationships. Another assistant added: *'Even if a person is competent in English, he still employs certain terms to actually express his meanings. But they can use facial expressions and body language to reduce misunderstandings and express direct feelings'* (HAN 2) At this point, non-verbal clues had another function: conveying far more vivid meanings than words, and reducing misunderstandings. It is worth pointing out that some assistants still had limited chances of travelling to analysts' workplaces, staying there and working physically with them for several weeks. During the interviews, Wen happily described this precious experience: *'When I sat next to him (the analyst), he could directly show me how to operate the system. I could understand his personality, when we had lunch together. We shared perspectives together'* (WEN 1). At this point, a physical mode of working kept them close to each other, which might affect concentrating on work and improving productivity.

In contrast, non-physical elements were regarded as less helpful to develop productive relationships. Most of the time, the assistants were geographically separated from their analysts and both parties used email and telephone to contact each other. Some assistants felt stressful when they received emails from their analysts: *'When I did not pick up calls in a timely fashion, he often resorted to sending me an email with an exclamation mark. This means "urgent"'* (RUI 2). Without verbal communication, an exclamation mark was used to express the analyst's urgency; this did not just force the assistant to feel *'every second counted'* (FANG2), but also prevented him initiating conversation or discussion. In this way, a productive and engaged relationship might break down.

There was another example of using email that resulted in less productive work relationships with analysts. One assistant emphasized a *'cold'* and *'impersonal'* feeling, when *'he (the analyst) writes emails very briefly, just using one sentence. His emails are like program orders or instructions, for instance, "this looks good", "this hasn't been mentioned", "very, very impersonal"'*. (WEI 2) Although no available data can explain the analyst's intentions, it can be partly interpreted that the analyst wanted to deliver instructions efficiently, which is part of his job. He may consciously or unconsciously break a whole sentence into several shorter, separate components, such as *'this looks good'*, *'this hasn't been mentioned'*, *'very, very impersonal'*. Despite this, based on the assistant's experiences and feelings, the analyst did not communicate much with him and the assistant felt a sense of an unequal relationship emerging from the use of email.

In contrast, some assistants expressed complicated feelings about analysts' voices on the telephone. Kant heard her Taiwanese analyst speak in a *'gentle, polite tone'*, and the analyst *'pointed out my mistakes very softly'* (KANT 1). With such positive non-verbal clues, their *'conversations and discussions are very comfortable'* (KANT 1). In contrast, Ying pointed out that her analyst criticized her in *'a serious tone'* and at *'a high volume'*, which provoked stress (YING 3). Facing these situations, as mentioned previously, she chose to *'keep silent'* (YING 3), so she did not develop a mutual understanding with this analyst. Thus, voice control and manipulation led to different effects: some established productive relationships while others experienced unproductive relationships.

To conclude, different non-verbal clues shaped the assistants' relationships with analysts differently. Productive relationships were cultivated through making use of facial expressions and body language in a physical context; an unproductive relationship often resulted from a non-physical context where email (text) and telephone (voice) were employed to a great extent.

5.3 Theme II: Managing Surveillance

This theme relates to the experiences of assistants when they felt that they were being watched and monitored by managers and remote analysts, which is here termed *surveillance*. Their experiences revealed two kinds of surveillance: *managerial surveillance* and *camera surveillance*. On the one hand, managers described how they used eye-to-eye surveillance to observe assistants' performance in offices and gave reminders to those who delayed progress. But the assistants' accounts indicated that sometimes they discounted or resisted managerial surveillance, but not always. In the following, I will present how managers and assistants contributed to shaping a flexible and friendly work environment, influencing assistants' attitudes and behaviours towards surveillance. On the other hand, it was found that remote analysts used cameras to observe assistants' performance. Based on rich evidence, I will show that they appeared to accept and even maintain camera influence over their behaviours; yet, in the meantime, it was evident that the assistants had certain resistance activities challenging the exercising of camera surveillance.

Sub-theme: Managerial Surveillance

To start with, a manager described how *'we (managers) stare at someone, remind them about work progress, and explain operating issues regarding how to communicate with analysts via email'* (TU 3). This was viewed as a form of monitoring from the perspective of a few assistants. *'The managers sit with us in the offices. Their responsibility is to monitor employees, but not in a coercive way'* (WEN 2). This seemed to involve a form of eye-to-eye observation and surveillance of assistants' behaviours in the physical workplace.

However, when asked how they felt about being watched, many assistants said that they did not feel any monitoring power over their behaviours. For instance, Xin pointed out: *'In my view, they did not do anything, but were always walking around and around'* (XIN 1). The use of eye-to-eye monitoring, from the perspective of the assistants, did not lead to any enhanced environment where their behaviours were under the eyes of the managers. Rather, they explicitly expressed how the workplace environment was *'less hierarchal'*, *'friendly'* and *'relaxing'*. At this point, managers saw *'walking around'* as a normal working practice without any explicit managerial purpose. There is further evidence explaining why a number of assistants did not experience a degree of surveillance. Part of the reason was the managers. James, a manager, provided some interesting clues. *'We aimed to help the assistants build up communications with analysts, and provided reminders only when they delayed progress'* (JAMES 1). The objective here was to create a workplace environment where the *'hierarchy was very simple, very friendly. We helped each other'* (KEN1), as described by another manager, Ken. Even in the workplace, the assistants' accounts show that they often talked about *'hobbies, movies and other personal topics'* while working with their managers. Ken noted that *'they (the assistants) really need time to have a rest, as they were too busy and their work*

was hard' (KEN 2). Unsurprisingly, this evidence shows that the managers did not engage in a strict form of monitoring, measuring or recording assistants' behaviours and performance, but chose to allow assistants to decide on own work progress and establish collaborations with analysts in active and proactive ways.

Sub-theme: Camera Surveillance

Under this sub-theme, I depict two types of camera surveillance of assistants' behaviours. One is door cameras used to check if assistants '*take any documents relevant to company information out of offices*' (MIKE 2). The other is office cameras, arranged in the corners of assistants' offices, warning assistants that '*we (assistants) can't take photos of screens. Any movements such as lifting arms are risky*' (YING 6).

Concerning the first form, door cameras, some assistants expressed that this was designed and employed as surveillance of their handling of confidential documents. Kant explained: '*It (door camera) helps to ensure that we leave all documents in the office, it's fine*' (KANT 3). The word '*fine*' indicates that she seemed to be comfortable with being checked. She continued to emphasize that the cameras functioned to check if they left their bags outside offices: '*According to regulations, we cannot bring bags into offices. Only if you hide it from the camera, can you take one in. Of course, we cannot take papers out*' (KANT 3). I did not access any data on formal regulations about this, I was more interested in how the assistants understood and coped with the cameras. Kant revealed how to '*hide it (a bag) from the camera*', and other assistants also confirmed this point during the interviews, that they often took their bags into the offices by using their bodies to hide them. Based on this account, she was making a judgment that it was reasonable to take bags in but not take papers out, and she was prioritizing what was or what was not allowable by their actions, which was in conflict with company policy. It can also be inferred that this involved a degree of dissent and resistance towards door cameras.

Regarding office cameras, they were fixed in the corners of each office to capture any movements of the assistants. As Ying explained, '*We can't take photos of screens. Any movements such as lifting arms are risky*' (YING 6). When asked about how they felt working in their offices, importantly, many assistants did not express any stress or resistance explicitly, but used such terms as '*relaxed*' and '*free*' instead. To explore the reasons why, I saw that, during the interviews, many assistants came downstairs from the offices and sat with me to conduct the interviews naturally. When I asked them whether it was appropriate to do interviews during working hours, they explained that they often '*stood outside offices*' and '*chatted with each other*' for a short period of time (YING 7). It was clearly pointed out by an assistant that places outside the offices '*were out of view of the cameras*'. Along with the assistants' responses to door cameras, these accounts also reveal that the assistants displayed a significant degree of dissent and resistance to office camera surveillance. Activities such as '*purchased coffee and snacks downstairs*' might not be resistant, as they were assumed to be normal practices, but others, including '*stood outside offices*' and '*chatted with each other*', can be viewed as resistant activities. This is because, in later forms, the assistants

devised a deliberate and strategic classification of where to work and where to chat, considering the places where cameras were arranged.

Despite their efforts to avoid the cameras, they expressed worries about the future. *'I heard from others that the number of cameras would increase to each corner of the office next year. Then they (analysts) can see us from every angle. Oh my God!'* (YING 8) In this account, she displayed not just a clear awareness that cameras were increasingly watching and monitoring them, but also revealed the possibility that they might be involved in more negotiations over cameras in terms of adjustments to their behaviours.

To summarize, although managers and analysts employed surveillance differently, they exerted a certain degree of monitoring of and control over assistants' behaviours. The assistants decided to downplay and discount the role of managerial surveillance, but there was still the possibility that they were constantly being watched by managers. Concerning camera surveillance, it served a much more explicit and powerful role, causing assistants to increase their awareness of their work states in the physical workplace; yet, meanwhile, the assistants appeared to make deliberate and strategic decisions to challenge and resist camera surveillance.

5.4 Theme III: Managing Presence

All the assistants talked about the diverse ways they managed showing their presence to remote analysts in a non-physical context. *Presence* does not simply refer to a kind of physical presence, such as being in the same workplace, it also highlights an inter-relational experience of ‘being together’, associated with the use of telephone and email. According to the assistants’ accounts, they intended to make remote analysts aware that they were working consistently and effectively in their offices, although the parties were geographically separated and in two different locations. In this section, I will go into the details of the theme *Managing Presence*, by explaining two sub-themes, *Providing Timely Responses* and *Matching Hours*, representing two main ways of showing and managing presence to remote analysts in a physical context.

It seems that the discussion in this section has some resonance with the sub-theme of *Using Nonverbal Clues*, which displays that non-verbal clues, such as voice and text, arising from email and telephone, significantly restricted assistants in establishing productive relationships with their remote analysts. While the use of email and telephone has brought challenges for gaining mutual understanding, this section highlights new opportunities when using telephone and email. More importantly, the section has some overlaps with the theme of *Managing Surveillance*, which has acknowledged the importance of camera surveillance of assistant behaviours. Yet, this theme of *Managing Presence* differs in exploring the strategic response of assistants, by showing how assistants employed email and telephone to resist, without crossing work boundaries or regulations.

Sub-theme: Providing a Timely Response

This sub-theme shows how assistants employed different features of email and telephone to deliver timely responses, so as to make a positive impression on analysts and show that they were working constantly. It is normally assumed that there is a distinction between email and telephone in response speed: email is an asynchronous tool that normally delivers information with a time lag, while telephone can synchronically deliver messages to the receiver without a time lag. The time lag in email made the assistants and analysts feel that ‘*its efficiency was bad*’ (TOM 3 & HAN 3). Here ‘*Efficiency*’ was treated as a measurable idea that was related to speed or the rate of sending and replying to emails. It was explained that, since ‘*he (the analyst) always asked me to find something that couldn’t be found at all, I felt every second counted*’ (RUI 3) Responding to analysts’ expectations and demands, assistants generally agreed that “*replying to an email within seconds is reasonable*” and prioritised sending emails over other tasks. In a similar manner, the assistants attempted to make their presence known by picking up telephones quickly. Mei said: ‘*I picked up calls very quickly. Very rarely did I delay calls. Because this work itself requires high efficiency*’ (MEI 3). The term ‘*efficiency*’ arose again, and Mei further explained that: ‘*making reports is closely associated with*

market information. *If a report is delayed, it cannot provide useful information about a changing market*' (MEI 4). This account revealed that the assistant did not just emphasize the importance of providing timely responses to market information, but also associated it with a display of her ability and skill.

However, while engaging in offering a timely response and demonstrating an efficient presence, some analysts occasionally delayed answering calls. Wen recalled: *'It is not the case that analysts will always answer your calls. We have to wait for them when they are free. Or we have to sit in the office all day, because I'm afraid of failing to answer calls from analysts'* (WEN 5). This account revealed that assistants were not sure when they would receive calls or orders from their analysts. This can be interpreted as a reaction to surveillance, but more importantly, there was a possibility that their analysts might try to balance their accessibility and inaccessibility, in order to maintain a significant degree of control over their own working pace.

Concerning assistants, there is rich evidence showing that they used different coping strategies to respond to analysts. For example, some *'delayed'* emails and calls and worked at their own pace. As Lao explained, *'it really depends on which one is more urgent. I need to classify emails in terms of their degree of urgency'* (LAO 1). On this point, he compared the response speed of an Indian analyst with an analyst from Hong Kong. *'The Indian analyst sends you something, but he forgets after a week; an analyst from Hong Kong sends you something in the morning and he urges you to reply in the afternoon'* (LAO 1) By making sense of the different response speeds of the analysts, this assistant chose to *'cope with the one who urged me to reply. The Indian analyst can wait'* (LAO 1). He classified them into two groups, based on different response speeds, which allowed the assistant to better manage *'my own time'*. The analyst from Hong Kong evaluated the performance of the assistant positively: *'We had a very good collaboration and he performed excellently'* (LAO 2). He seemed very satisfied with his performance. While the India analyst was not engaged in the interview, there is a possibility that he did not notice this particular situation. In this instance, presence did not completely break down, rather it was deliberately decided upon and controlled by the assistant; in this way, he gained a certain autonomy and discretion while simultaneously continuing to present a positive impression towards his analysts.

The second example is the shift from telephone to email. Jack elaborated the differences between the use of these two tools: *'telephone calls are very pushy, but emails are relaxing'* (JACK 1). I mentioned the features of asynchronic and synchronic tools at the beginning of this theme, the two tools imposed quite opposing experiences on the assistants. As Qing said, *'his telephone calls may push me to provide direct feedback or perspective. This makes me a little nervous'* (QING 5). Clearly, the telephone was viewed as a tool that required an immediate response. To cope with the *'pushy'* problem, Qing *'wrote an email first to ask whether my analyst had time to discuss with me'*. This was helpful because *'I can have time to prepare questions'* (QING 5). Han and Zhou told me of similar practices. In this example, a deliberate shift from

asynchrony to synchrony allowed them to extend their autonomy and discretion for a very short period of time (e.g. several minutes), by shifting. In other words, this presence creates a new temporal experience. In this way, it can be interpreted that at least they were able to manipulate and control the sense of them being constantly available to a certain extent.

Sub-theme: Matching Hours

The assistants' accounts reveal how they matched their working hours to the analysts', to give the impression of constant availability. Their experiences also point to how they made use of the telephone and even mobile phones to manage and manipulate a positive impression given to the analysts.

First, the assistants began and finished work based on the analysts' working hours. This was quite different from many traditional organizations in China that commonly share an eight-hour working system (from 9 a.m. to 5 p.m.) and have a lunch break at noon. Some assistants were told by their analysts that it was unnecessary to come into the office in the morning, if there was no task allocated; others were required to begin work early in the morning around 7 a.m., in order to produce morning reports for financial markets in different time zones. A different arrangement also existed for the time they left work. It was surprising to learn that many assistants left the office very late at night, especially in busy seasons. This was partly because the analysts often issued tasks very late and expected assistants to work overtime to accomplish them. But what is interesting is that they expressed strong understanding and willingness: *'My analyst was still working there, how could I leave earlier?'* (KANT 4). In this comment, the term *'there'* revealed the fact that while the assistant was physically separated from her analyst, she tried hard to give the impression of always being *'there'*, together with the analyst. In this way, staying late at night was considered a powerful means of transcending geographical constraints and presenting themselves efficiently and positively.

Second, some assistants matched their lunchtime to the analysts'. *'Sometimes, he (the analyst) would suddenly called me, and I (the assistant) had to put down my lunchbox'* (WEN 6). After many instances of this, Wen decided to give up going out to eat and ordered food delivered to the office instead. This reflects her strong willingness to comply with the working hours of the analyst. After four years of work interaction with her analyst, she confidently said: *'I can figure out when he will have lunch, about 80 per cent of correct'* (WEN 6). In this way, she gave an efficient and positive sort of presentation. In similar manner, Han also told me that she restricted the time for lunch to within one hour, from noon to 1 p.m., because *'in this period, he would not come to talk to me'* (HAN 4). Matching lunchtimes was like eating with their analysts *'there'*, and this made it much easier for the analysts to access their assistants. Other assistants agreed that they needed to be non-physically present in order to provide support for their analysts at any time.

Third, a few assistants worked at the weekend based on analysts' requests. I conducted some interviews on Saturday and Sunday and found that the interviewees were still working hard in their offices. *'I often work at the weekend, especially on Saturday. My analyst always worked the whole week and did not take any rest'* (XIN 3). From analyst Tom's viewpoint, he did not require the assistant to work at the weekend, but *'if I found some mistakes in their reports, I would call them on a mobile phone or use Wechat to ask the reasons why'* (TOM 4). In this instance, in addition to email and office telephone, mobile phones were employed to access assistants and even afforded a degree of monitoring, which was similar to face-to-face encounters that require synchronous communication and performance. But, while the analysts made use of mobile phones to extend assistants' working hours, this was not always successful. Hai revealed that: *'I would reply to him (analyst) after a while, but not immediately at the weekend'* (HAI 8). In this example, the assistant deliberately delayed his response, and thus took control of his working hours to a certain extent, although he still extended his working hours at the weekend.

Thus, there are another two typical examples where the assistants arranged their working hours so as to manipulate and present their availability as constant. First, the sub-theme of *Camera Surveillance* mentions situations where many assistants stood outside their offices for a break or went downstairs to purchase coffee and snacks, in order to *'escape'* from the cameras. Here, these activities reflect their concerns with improving their autonomy and independence during long working hours. Zhou pointed out that: *'I have more space and I can arrange my time freely, as no one is constantly watching you'* (ZHOU 2). The *'space'* she mentioned was created and expanded during agreed working hours. This is not to say that the assistants did not actively adjust their presence to suit analysts, but they sought new possibilities to sustain their presence while at the same time supporting their own independence. In this sense, they were striking a balance between responding to others' demands and expectations and using their own discretion.

The second interesting instance is *'playing tricks'* during telephone meetings. Jack, a junior assistant, was very proud to tell me: *'I often did my own thing, drawing pictures, reading books, during telephone meetings. The meetings were boring'* (JACK 2). This was feasible, because he *'pretended to listen to the calls and, at the same time, say "mm", "yes" and "ok" in response'* (JACK 2). He further explained that: *'if it's face-to-face, I can't do that; but at a certain distance, I can do whatever I want'* (JACK 2). In this example, the telephone provided a new opportunity to manage presence: even though the phone always requires a presence that is similar to a physical one, Jack sustained his presence by using simple symbols while simultaneously holding the phone away from his ear. To a certain extent, this was still experienced as a positive and efficient presentation, but this allowed the assistant to improve his flexibility in managing long working hours.

5.5 Theme IV: Cultivating Belonging

This theme relates to experiences when assistants constructed and reconstructed their availability to peers in a physical context. *Belonging* refers to a kind of personal connection and attachment to the assistants he or she works together in the same workplace. Based on rich accounts from the assistants, belonging to peers has become a distinguished inter-relational experience for them, compared with those related to remote analysts and managers. There is rich evidence highlighting that these inter-relational experiences with peers did not just shape positive and engaged relationships with peers, but also significantly affected their own understandings and actions of their relations with managers and remote analysts. That is, my data here reveal how followers' relations with peers were influential in shaping their relationships with leaders. The theme comprises three sub-themes. The first one is *Perceived Similarities*, describing how assistants made use of the personal characteristics of peers and the nature of tasks to perceive and identify a high degree of similarity with peers, allowing for the emergence of strong personal connections. The second is *A Sense of Community*, explicating the ways peers mutually supported each other and rebuilt certain norms inaccessible to managers and analysts. Third, *Not Feeling Part of the Group* portrays how assistants were uncertain whether they belonged to this group in terms of distinct personal skills and qualifications that peers displayed and they were struggling to build up a strong attachment to this group. The three sub-themes are presented as three subsections below.

Sub-theme: Perceived Similarities

This sub-theme shows two key factors allowing assistants to identify similarities with peers: personal characteristics and nature of the task. The perception of similarities in these factors enabled them to build connective and engaged relationships with their peers. Xue highlighted the first factor, personal characteristics.

'We are young people, and the age range is less than five years. We communicate with each other very easily. Also, we have study abroad experience, so we have lots of common hobbies' (XUE 4)

In this account, she emphasized three personal characteristics she perceived as similar to her peers, i.e. age, education experience, hobbies. She continued and elaborated: *'You don't need to pretend to be extraordinary because of study abroad experience. This doesn't exist'* (XUE 4). Clearly, perceived individual differences in terms of education background were reduced and even eliminated. It can be interpreted that they implicitly promoted in-group similarities associated with education background, because such perceived similarity provided them with a sense of security and affirmed their acceptance into their peer group.

The second important factor contributing to perceived similarities is the nature of work. Interestingly, all the assistants interviewed used the term ‘*friends*’ to describe the role of their colleagues. This term highlights that their relationships involved less structural and competitive conflicts with each other. Kin commented that: ‘*The way we get along with each other is very similar to mates at university. I don’t see any difference from that*’ (KIN 4). He equated peer relationships with university mate relationships and seemed to overlook the formal organizational context they were embedded in. Kin explained: ‘*I am an employee, it’s true. But all the employees are on the same level, although above us there are managers. We don’t have superior-subordinate differences*’ (KIN 4). They described having ‘*flat*’ relationships with each other. ‘*Flat*’ means that they ‘*have no conflicts of interest, no competitive relationships and no hierarchical sense. They just needed to perform tasks individually and one’s work progress did not interrupt others*’ (KIN 4). Other assistants expressed similar viewpoints. Based on their quotes, they did not take their positions, such as senior assistant and junior assistant, seriously, but privileged work relationships as independent and autonomous. As mentioned previously, their key objective was to meet the needs and demands of remote analysts. This allowed them to have a high degree of self-control of tasks and not have conflicts of interest with peers. In this regard, a high level of independence without destroying each other and a key focus on analysts served as an excellent foundation to develop belonging to peers.

Sub-theme: A Sense of Community

This sub-theme describes the feeling of community when they understood and supported each other, especially when they ‘*helped to resolve technical problems*’ and ‘*comforted each other*’. A sense of community was also evident when the assistants reproduced shared norms that prescribed how they ought to act and changed these norms.

First, the assistants expressed a strong desire to get together and build a mutually supportive atmosphere. Lao previously worked for a local company that ‘*did not provide set tables, so for a group of people working with me, it was first come, first serve, to occupy a seat*’ (LAO 3). This co-working environment was attractive in the beginning, as he had a certain flexibility in deciding where to work (office or home) and with whom to chat, but he gradually found it ‘*boring*’, as he did not meet a group of colleagues doing similar tasks. As he explained:

‘I really need a community, a social group, because humans are social animals. I can’t survive being by myself. Just like it rains heavily in this city and the traffic jams are serious. You can’t feel you belong. So I think to cram into buses is also a good experience’ (LAO 3)

He described as *'social animals'* those having everyday communication and interactions with others. Using the example of *'cram into buses'*, he expressed the desire to build some relationships with others, which concerned an essential part of his work. So, what did the assistants actually do when they got together in the physical workplace or other places?

Mei claimed that: *'I cannot work without office culture, without people who can drink and eat with you'* (MEI 5). More than these activities, she noted: *"some colleagues can help me to resolve technical problems and we often discuss problems together in the office'* (MEI 5). Han added *'we often comfort each other, especially when someone is strongly criticized by an analyst'* (HAN 5). The quotes indicate that peers did not just discuss task-related issues, but also shared emotional aspects with each other. In previous themes, they revealed situations where they established, and engaged in, productive relationships with remote analysts, but now they faced new kinds of surveillance from analysts and even from managers. It can be inferred that pressure from analysts and managers may stimulate the assistants to seek help and comfort from peers. When Han's analyst was reluctant to answer her questions and provide feedback, she said: *'My colleagues are more influential, because they can tell me how to operate this or that'* (HAN 5). In doing so, the assistants actively moved closer to each other and developed personal attachments.

Furthermore, the assistants attempted to reproduce and adopt informal norms that prescribed how they ought to act. It was interesting to hear from Wen that: *'We helped each other to pick up calls from the analysts'* (WEN 7), meaning that *'we often helped each other to make excuses to the analysts, for instance, he (an assistant) was told they were in the toilet for a while, in fact my friends were out purchasing snacks'* (WEN 7). *'Making excuses'* here shows that peers became important partners to help manipulate their *'presence'* to analysts. At the beginning of the interview with Wen, she asked Yinghui to *'look after'* calls. The term *'look after'* means that *'if my analyst asks where I am, you tell him I am in the toilet and will come back soon'* (WEN 7). Similar statements were also made by other assistants. The interpretation of these accounts cannot be separated from previous accounts about managerial surveillance, where managers allowed assistants to control work progress and did not exercise coercive forms of monitoring. This means that assistants' behaviours were still under the eyes of managers, although this was not explicitly pointed out. Of course, there was another possibility, i.e. that assistants themselves created a safe and secret environment where their behaviours were not easily discovered thanks to mutual support from their peers. At this point, peer relationships differ from their relationships with analyst and managers, as assistants appeared to play a proactive and strategic role in coping with the demands and expectations of other parties.

Sub-theme: Not Feeling Part of the Group

While the assistants mutually supported each other and cultivated a sense of community, some of them did not feel part of the group, because they perceived differences in personal characteristics and qualities. There is evidence showing that some assistants made a clear distinction between a ‘*workplace friendship*’ and a ‘*real friendship*’. As Zhou explained:

‘Real friendship is different from workplace friendship. I need two kinds of friendship. Real friends and workplace friends have different social functions. Real friends do not often talk about work, but workplace friends often discuss work-related things’ (ZHOU 4)

In this account, the assistant clearly recognized the difference between two kinds of friendship, workplace friendship and real friendship. Although the available data show a high level of engagement and connections among peers at work, some of them still spent a significant portion of their time communicating with ‘real friends’ in their daily lives. Indeed, friendship is an inescapable part of most people’s daily lives, but an interesting point emerges from Zhou’s explanation: friendship with peers, in her eye, was not ‘real’, as it was filled with many work-related elements, not personal feelings and emotions that ‘real friends’ often deal with. The judgement of ‘not real’ friendship reveals a sense of suspicion or uncertainty about workplace belonging or friendships. It served as an important signal that peer belonging might not as strong and stable as they describe above. It is still possible that peer belonging was being continuously questioned and transformed in their inter-relations at work.

There is further evidence showing that the assistants appeared not to attach relationally to their peers, according to two factors, specific skills and abilities, and education background. Hainan gave a detailed explanation of the first factor. *‘There are two reasons highlighting differences between assistants. First is language. Someone may be able to speak Japanese or some other non-universal language. Second is a special background. Someone studied medicine before, so he knows better than others in this field’*. (HAI 2) In this account, language and specific knowledge were perceived as critical drivers invoking perceptions of difference among assistants. This perceived difference might enable assistants to distinguish themselves from their peers, and also have a feeling that they were not qualified to be in this group. That is, they might become less attached to their peers.

In a similar manner, the second factor, a distinct education background, also discouraged a sense of belonging to peers, by distinguishing some assistants from others. Almost all the assistants I interviewed mentioned that they had previously studied abroad, but a few did not have such experience. For instance, having studied as an undergraduate and on a postgraduate programme at a Chinese university, Ying described a strong feeling that she was unable to ‘*compete with other assistants*’ who had master’s degrees from universities in the UK and other countries (YING 9). The term ‘*compete*’ seemed to imply that she

had a sense of competing for recognition, but after a close reading of her subsequent statements, it was evident that she was thinking more about how to integrate herself into this group. She mentioned '*I'm a bumpkin among my colleagues, because they studied abroad starting in junior school*' (YING 9). She particularly pointed out one peer: '*he (another assistant) was extraordinary among our assistants, because he graduated from Tsinghua University*' (YING 9). The metaphor of '*bumpkin*' implies that she did not seem to want to compete against others for recognition but recognized a clear distinction between her education background and theirs. It is possible that this perceived difference from her peers caused her to become uncertain whether she belonged to this group or was struggling to attach it.

5.6 Conclusion

This chapter has presented the major findings of this study, structured by four themes and ten sub-themes. Under the first theme of Establishing Productive Work Relationships, it is evident that assistants were constructing and reconstructing work relationships with analysts and managers in terms of trust, knowledge sharing and nonverbal clues. Under the second theme of Managing Surveillance, I have provided rich data that the assistants were also experiencing considerable levels of camera surveillance conducted by remote analysts; at the same time, the assistants were facing some forms of eye-to-eye monitoring from managers, although they discounted the influence of this to a significant extent. Concerning the third theme of Managing Presence, it illustrates that the assistants were forming and managing their impression of constantly working to remote analysts, by making use of different features of email and telephone. Regarding the final theme of Cultivating Belonging, there are adequate findings suggesting that they were cultivating a high level of belonging to peers in the physical workplace and establishing certain norms inaccessible to managers and analysts.

Thus, in this chapter, I have presented interpretations of the findings, that is, financial assistants' experiences of inter-relating with remote financial analysts in non-physical contexts, and managers and peers in physical contexts. Based on this, a further level, a theoretical interpretation of the empirical findings, is particularly pertinent, in order to understand how these themes illustrate existing arguments and perspectives featured in the Literature Review, and to identify where new insights emerge from the data. In the next chapter, I will demonstrate how these findings shed light on the concept of follower-leader distance via which to advance a new understanding of followership complexity in terms of the follower-leader relationships under study.

Chapter 6: Discussion

6.1 Introduction

This chapter aims to extend existing understandings of followership by drawing on key findings. In Chapter 2 (Lit. Review), I emphasized follower-leader relationships and followership context as two key aspects constituting followership complexity. However, the existing followership literature provides very limited understandings of two important gaps. First, the studies tend to investigate followers in isolation with leaders, other actors and contexts, putting too much emphasis on individual traits, characteristics and roles (Collinson, 2006, 2011; Empson & Alvehus, 2019). Second, they treat the followership context as one or more independent or external variables of the followership phenomenon and fail to consider the possibility that the followership context and follower-leader interrelations reproduce each other.

In addressing these two gaps, the findings chapter presents four themes. i.e. *Establishing Productive Work Relationships*, *Managing Surveillance*, *Managing Presence* and *Cultivating Belonging*. The central idea behind the themes is about different ways in which financial assistants interrelated with managers in a physical context and with financial analysts in a non-physical context. To further discuss how the key findings demonstrate the research aim of the construction of follower-leader relationship and two contexts, it is important to introduce the perspective I adopt to analyse these issues. In the Literature Review, I have acknowledged that the post-heroic perspective, especially relational and processual leadership studies, help us to shift part of the attention away from the internal and external aspects of followership towards a more relational, socially constructed and dynamic version. At the same time, I point out the potential limitation of marginalising or even eradicating the role of follower agency, which is increasingly central in leadership debates (Collinson, 2017; Ford & Harding, 2018; Einola & Alvesson, 2019). To not make followership and leadership processes fully shared and keep leadership and followership as distinct aspects, I introduced the critical perspective to further address the relational, dynamic and contradictory asymmetries and inequalities in which followers and leaders engage in constructing new meanings of relationships in terms of a degree of external social orders and other hierarchy creating drivers (Einola & Alvesson). Hence, I draw upon the critical perspective to understand not just aligned relationships and shared perspectives, but also divergent and ambiguous meanings and constructions in the context.

6.2 Usefulness of follower and leader categories

Before introducing the distance lens, it is important to reflect critically on why ‘follower’ and ‘leader’ are useful terms to conceptualise the participants and also why I am not just looking at working relationships. Learmonth and Morrell’s (2017) article is helpful and relevant to this discussion, as they warn of a category problem in that people are simply locked into follower and leader identities without a critical reflection. They highlight the difficulty of constructing critical analysis in the language of leadership, which has become an important routine way to talk about hierarchy within groups, which has little distinction from the terms ‘management’ or ‘management development. As a result, they point out that some studies taking a critical perspective ‘appear to use the leader/follower dualism just like the mainstream’ and imply that ‘leadership and followership are neutral, natural and necessary categories of analysis’ (p. 265).

I agree with their view on the importance of taking a critical stance towards using the terms and avoiding equating leader and follower with formal positions or titles. However, this does not necessarily mean to directly reject the usefulness of the terms and simply link the terms to those conventional meanings. I broadly adopt Collinson’s (2017) critical response to Learmonth and Morrell’s (2017) paper and suggest preserving the terms in my analysis in order to reveal ‘deep-seated divisions and conflicts’ arising from various structural and hierarchical differences (p. 276). From his perspective, ‘leader’ and ‘manager’, ‘follower’ and ‘employee’ are similar but cannot be overlapped, as ‘manager’ and ‘employee’ can ‘obscure internal managerial hierarchies, differences, tensions and struggles’ (p. 277). As I will show in the remaining of this chapter, the empirical evidence demonstrates that financial assistants as followers and managers as physical leaders did not just adopt and maintain the hierarchical form of distance in which the followers had to adopt the formal roles and responsibilities; rather, the followers played an active role in reconstructing alternative versions of distance to express suspicion and dissatisfaction towards the physical leaders. This case allows us to catch a glimpse of the significance of followers that express more than subordination as the term ‘employee’ delivers. So, labelling participants into the categories of ‘follower’ and ‘leader’ means locating them into structural, organisational, cultural, social and economic contexts where the actors are involved in understanding, maintaining, reinforcing and transforming asymmetries and inequalities in terms of external structures and drivers.

Moreover, the follower-leader relationships constructed shown in this chapter below address wider forms based on multiple dimensions and degrees than those smooth or fully aligned relations in the accomplishment of organizational objectives. Hierarchical relation is one type of the relationships only: there is a formal contracted relationship between financial assistants and managers belonging to the same outsourcing company and a formal outsourcing contracted relationship between financial assistants and analysts as well. Yet, my data indicates that these formal relationships remained

open to multiple interpretations, understandings and (re-)constructions by those individual participants, and the (re-)construction of the relationships involved variation, conflict and fragmentation, producing disrupted and contradictory rather than fully shared relations as the literature describes. Therefore, I conclude that the terms of ‘follower’ and ‘leader’ are useful to capture complex realities of followership and leadership in specific contexts and the notion of follower-leader relationship may be a helpful way of understanding more diverse and subtle versions of followership dynamics in this study.

6.2 Concept of Follower-leader Distance

In this section, I explain the concept and how it comprises five dimensions, physical, psychological, cultural, functional and structural, plus degrees of proximity and detachment. Based on the key findings of this study, follower-leader distance can be understood as a contextual element of the follower-leader relationship and describes a state of there being a certain separation between followers and leaders. I would highlight at the outset that the term follower is foregrounded, because this study broadly adopts a followership perspective in which followers play a key role in inter-relating with leaders. More importantly, the term distance is primarily concerned with ‘how’ followers interrelate with leaders to negotiate and construct distance between them, instead of ‘what’ the distance is. In this sense, distance does not embrace a narrow and static perspective of followership, which often describes followers and leaders as mutually exclusive and independent of each other; rather, it promotes a dynamic and complex perspective, capturing the dynamics and multiplicity of follower-leader relationships and followership contexts. So far the concepts of distance, leadership distance and leader distance have becoming increasingly significant in the field of leadership. The literature reveals an appealing situation where distance can be a valuable notion defining and shaping the leader-follower relationship (Bligh & Riggio, 2013; Shamir, 2013), but it tends to undervalue the role of followers who are active in expressing and constructing distance from leaders (Collinson, 2005). In the following, I elaborate two important aspects of Follower-Leader Distance, dimensions and degrees of distance, emerging from the key findings. My intention is to illustrate how and why both aspects resonate with a broad movement in the literature and to suggest how they advance our understanding of the followership phenomenon.

Dimensions are the first and critical aspect of Follower-Leader Distance. This illuminates ‘various forms that distance might take and what relationship it might portray when particular dimensions are activated’ (Lewandowski & Lisk, 2013, p. 21). That is, dimensions represent different types of follower-leader relationships. According to the findings of this study, follower-leader relationships emerge from differences along physical, psychological, cultural, functional and structural dimensions. For example, when a follower

and a remote leader are physically separated, this means that their relationship can be understood as physical to a certain extent. Meanwhile, their relationship may be psychological, cultural or structural, in terms of particular ways of interrelating. Moreover, dimensions also represent different features of two contexts, which are not simply external and independent, backgrounds versus followers, but rather influenced and shaped through follower-leader interrelations which determine what opportunities and challenges followers may have, which in turn influence their interrelations with leaders. In other words, dimensions provide a contextual understanding of follower-leader relationships. So far, leadership scholars have portrayed how leaders create and manage different dimensions of distance (e.g. Antonakis & Atwater, 2002). However, my findings suggest a different focus on how followers interrelate with leaders to make use of contextual resources to create and recreate dimensions, although there is a certain overlap with existing labels and dimensions. This new focus expands our understanding of follower-leader distance as multiple, inter-relational and constructed.

A second important aspect of the concept follower-leader distance is degree, that is, the extent to which a follower acts very differently according to whether a leader is close or distant. Simply put, degree represents the extent to which a follower accepts, sustains or challenges the distance a leader establishes. This notion highlights the relational tense of follower-leader distance in each dimension, which cannot be simply assumed, as followers and leaders are rarely viewed as fixed at certain points with a definite separation in-between. I have addressed how the existing leadership literature tends to put too much emphasis on leaders who create and sustain distance from their followers to a certain degree (e.g. Antonakis & Atwater, 2002; Shamir, 1995, 2013). A 'reasonable' degree of leader distance, from their perspective, is useful to fulfil effective leadership, such as improving followers' perceptions of charismatic leaders (Howell et al., 1998; Katz & Kahn, 1978; Popper, 2013) and conveying a group vision (Berson et al., 2015). However, are followers likely to engage in evaluating, accepting and even creating distance from their leaders so as to facilitate or challenge leaders' influence?

The rich evidence from the findings of this study reflects that followers played an indispensable role in creating and recreating follower-leader distance. Degree enriches our understanding of follower-leader relationships in terms of their relational tense. A combination of degree and dimension is particularly useful to develop a broader understanding of distance. Focusing only on dimensions fails to make sense of the extent to which followers and leaders interrelate with each other in daily working lives. Focusing on degree only, in a similar manner, may not explain how particular contexts shape and are shaped by their relational dynamics. I present Table 6.1, below, showing definitions and elaborations of degrees and dimensions of Follower-Leader Distance. By combining degrees and dimensions, I aim to present how each type of distance is created and recreated in terms of different degrees, therefore gaining a comprehensive understanding of the issue of follower-leader distance under study. Subsequently, I theorize follower-leader distance by explaining two degrees of proximity, i.e. proximity and detachment, and five dimensions, i.e.

physical, psychological, cultural, structural and functional. Next, in the main body of this chapter, I will illustrate the concepts above based on each theme and sub-theme, with reference to the literature already critiqued in Chapter 2 (Lit. Review). The key reason why I present a detailed discussion in this way is the interpretive position I adopt, which allows me to convey my interpretation of the participants' interpretations in a compelling and detailed way.

Five Dimensions:

• *Physical Distance*

Physical distance is broadly defined as an objective or geographical length between two people or objects. The concept of physical distance has been widely recognized by leadership scholars, suggesting that physical distance plays an indispensable role in influencing and shaping leadership relationships (Howell et al., 2005; Kerr & Jermier, 1978). My findings partly support this view: indeed, assistants and analysts may be physically detached in two different countries while assistants and managers can physically meet each other in the same workplace; it may be tempting to wonder whether psychical proximity or detachment enhances or weakens follower-leader interrelationships, based on a view in the literature that distance is a wholly separable object from other dimensions. But the accounts above call for a broader understanding of physical and other dimensions, because few assistants explicitly mentioned physical distance, but largely focused on talking about their experiences of developing inter-relational experiences. As mentioned above, dimensions such as physical distance can be influenced and understood through their inter-relational experiences in order to make sense of and decide what opportunities and challenges physical distance pose, which in turn influence their interrelations. In this sense, as physical distance influences and shapes follower-leader interrelations and relationships, it can be recognized as an integral part of follower-leader relationships already under way, which cannot be treated as independent and external to those followers and leaders.

• *Psychological Distance*

Psychological distance can be defined as the subjective perception of proximity or detachment a person feels from a relational partner (Popper, 2013). Based on the available data, I suggest that psychological proximity emerges from interrelations between assistants and remote analysts in a non-physical context, and also emerges from interrelations with peers in a physical context. For example, the diverse personal characteristics of remote analysts (e.g. work experience, professional skills, education backgrounds) invoked trust and distrust, enabling assistants to construct two levels of psychological distance from remote analysts; perceived similarities in personal characteristics (e.g. education background, personal hobbies) and tasks did not just produce a high level of belonging towards peers, but also invoked a significant degree of psychological proximity. While my interpretation resonates with the literature that deals with the issue of psychological distance from the standpoint of followers (Berson et al., 2015; Shalley & Gilson, 2004), my analysis considers the inter-relational aspect of psychological distance, instead of its purely subjective

aspect. This helps to explain, on the one hand, how followers were subject to others and contextual factors, and on the other hand how they might choose to perceive and create subjective distance from others.

- ***Cultural Distance***

Cultural distance describes a culturally embedded experience of proximity or detachment. Follower-leader distance can be defined as culturally constructed, relying on how followers understood the cultural backgrounds of remote analysts and how they believed that analysts would behave in those cultural environments. There is evidence that analysts' cultural backgrounds (e.g. from Hong Kong or Japan) enabled Chinese assistants to build a sense of trust. Some interpret that both Japan and China have high power asymmetry culture where followers view their leaders as role models and desire to mimic their behaviours, so as to build up cultural proximity with them, based on Hofstede's (2003) Power Distance Index. However, other evidence shows that analysts' cultural backgrounds (e.g. from South Korea), in contrast, limit assistants being able to build trust, based on negative work interactions. This suggests that an examination of cultural distance at a collective level downplays the possibility that followers may understand, assess and have different interpretations of remote leaders' cultural elements. Taking a critical followership perspective, cultural distance is not pre-determined, but is shaped and reshaped through particular inter-relations between two parties.

- ***Functional Distance***

According to Napier and Ferris' (1993) definition, functional distance refers to 'the degree of closeness and quality of the functional working relationship between the supervisor and the subordinate' (p. 337). In this study, it is especially suited to explain levels of follower and leader participation and engagement in task-related issues. This study shows the emergence of functional proximity between assistants and analysts. For example, when analysts provided useful feedback and guidance on assistants' work, assistants in turn became active and proactive to engage in communication and desired to promote interconnection and communication. Followers can recognize their work as valuable and meaningful, so the quality and frequency of engagement between two parties increases and functional distance reduces (Richard, 2013). In contrast, when analysts expressed reluctance to answer questions, and assistants chose to withdraw their engagement, these practices may imply that both parties were very likely to increase their distance from each other.

• ***Structural Distance***

Structural distance refers to aspects of distance arising from ‘perceived differences in status, rank, authority, social standing, and power’ (Antonakis and Atwater, 2002, p. 16). It should not be surprising that the leadership literature on distance has recognized that a degree of formal asymmetry plays an important role in shaping and reinforcing structural detachment between subordinates and managers. But the rich evidence in this study argues for a broader and dynamic perspective of this notion. On the one hand, managerial surveillance and camera surveillance enabled managers and analysts to exert considerable control over assistants’ behaviours and to establish a clear separation between assistants and themselves. This part of the evidence aligns with viewpoints in the literature, describing how individual leaders create and sustain a hierarchical distance from followers (Cole et al., 2009; Shamir, 1995). However, other evidence indicates that assistants discounted managerial surveillance and sought ways to resist camera surveillance by analysts. Followers can prevent leaders from exercising too much control over distance and even transcend the contextual constraints of hierarchical distance to a certain extent (Collinson, 2005b; Grint, 2009; McCabe, 2013). In this sense, my analysis illustrates a more dynamic and inter-relational perspective of structural distance, in contrast to the concept in existing literature.

Two important insights emanate from five dimensions. First, as mentioned above, the dimensions display five particular characteristics of follower-leader distance and propose what types of follower-leader relationship might occur in terms of particular contexts. An analysis of every dimension aims to cast light on a nuanced understanding of the characteristics of follower-leader relationships. Taking a critical followership perspective, each dimension is shaped and reshaped by the participants who experienced inter-relations with others. This responds to criticisms of existing leadership research on leadership distance, reviewed in Chapter 2 (Lit. Review). Studies tend to adopt a narrow and limited viewpoint, describing physical, psychological, cultural, structural and functional dimensions having a stable and fixed nature.

Second, these five dimensions shed light on the particular characteristics of physical and non-physical contexts. While followership research has examined the significant role of followership context, it does not explicitly address how contextual features are shaped and reshaped during follower-leader interrelations. In this study, it was found that context and follower-leader interrelations mutually influence each other. The focus here is not just on how interrelations shape five dimensions of distance, but also on how these dimensions, representing particular features of physical and non-physical contexts, influence followers and leaders to respond and deal with them. For example, physical and non-physical contexts and the *structural* dimension describe equal and unequal relationships between followers and leaders. Physical and non-physical contexts with the *functional* dimension show task-related aspects of contextual information, including the ways actors negotiate with each other about knowledge sharing, working speed and working hours. The five contextual dimensions, in this sense, can be viewed as both a resource and a product of follower-leader interrelations. Accordingly, non-physical contexts display unpredictable and shifting

opportunities and challenges for followers. The context provides a rich environment for followers to navigate and make decisions about when and how to follow their remote leaders so as to bring rich meanings to their relationships. Meanwhile, the context prompts followers to react in ways that leaders expect to see, although there is room for navigation and discretion. The physical context plays an equally important role in influencing followers. The context is much more complex than what is described in the literature, as it stimulates followers to actively build up positive and engaged relationships with leaders and peers in a physical context, although they are clearly positioned within a formal hierarchy. At the same time, the context carries risks for followers experiencing subtle and hidden types of control and influence from those leaders.

Two Degrees of Follower-leader Distance:

Proximity and Detachment

I have addressed above that degrees of distance help to explain the relational dynamics of follower-leader relationships, especially pointing out the important role of followers in enabling the dynamics. Here I introduce two further core degrees of distance, i.e. proximity and detachment, in order to explain how relational dynamics take place between followers and leaders. Proximity denotes followers' and leaders' desires and actions to move closer to each other so as to improve familiarity, engagement, interdependence and commitment. For example, it was found that some followers (or assistants) expected to learn professional knowledge and skills from remote analysts, and gradually have strong trust in them. It was also evident that some made efforts to provide timely responses to remote analysts by making use of the features of email and telephone. These examples show that those assistants desired to transcend geographical separation and create a significant level of proximity and engagement with analysts. Detachment, in contrast, indicates their desire and actions to move away from each other, in order to promote independence, disengagement and autonomy. It was found that many assistants became unwilling to ask their analysts questions and kept silent, intentionally detaching themselves from their analysts.

Two sets of implications emerge from two degrees of distance. First, as addressed in Chapter 2 (Lit. Review), while the current leadership literature uses 'close' and 'distant' to explain different degrees of leadership distance, it puts too much emphasis on a separated and static nature, describing how followers and leaders are either in a state of moving closer to each other, or moving away from each other. However, the available evidence offers an alternative explanation, i.e. that both parties are in a 'double' action of proximity and detachment. A 'double' stance indicates that followers and leaders are never finalized at certain points, but always in tension, constantly moving closer to and away from each other. Resonating with Collinson's (2005b) viewpoint, proximity and detachment are better viewed as 'inescapable, mutually embedded and shifting features' of followership relationships (p. 244).

The second implication is the interdependence of physical and non-physical contexts arising from the proximity and detachment between actors in two different contexts. To date, the followership literature has taken an interest in either a physical context or a non-physical one, without any ‘both-and’ thinking; leaders are then treated as those capable of operating and managing contextual meanings. However, my evidence challenges this assumption, illuminating how both followers and leaders are very active in both contexts and their construction of proximity and detachment shapes the overall interdependence of two contexts. It was found that many assistants and managers in a physical context established a significant level of proximity; this proximity partly emerged when assistants experienced negative and disengaged interactions with remote analysts in a non-physical context. In this situation, as assistants were moving away from their remote analysts in a non-physical context, they simultaneously drew closer to their managers in a physical context. It was also evident that when assistants developed a considerable level of belonging and commitment to peers and moved closer to them, they created certain norms within this group that were inaccessible to managers and analysts. In this way, proximity and detachment in two contexts mutually influence each other, shaping an inseparable relationship between the two contexts. Overall, both physical and non-physical contexts can be seen as two highly uncertain and shifting settings, where the dynamics of follower-leader interrelations and relationships are central to shaping and constituting particular opportunities and challenges for followers to respond.

Table 6.1: Definitions and Elaborations of Follower-leader Distance

Dimensions of Distance	Degree of Distance: Proximity	Degree of Distance: Detachment
<p>Physical distance: Geographical or objective length between two people.</p>	<p>Geographical closeness between assistants and managers (same workplace).</p>	<p>Geographical separation between assistants and remote analysts (in different workplaces, organizations and places).</p>
<p>Psychological distance: Subjective perceptions of feeling close to or far away from someone (Trope & Liberman, 2010).</p>	<p>Subjective perceptions of familiarity and interconnections with others.</p>	<p>Subjective perceptions of feeling distinct differences from others.</p>
<p>Cultural distance: Culturally embedded experiences of proximity or detachment.</p>	<p>Proximate experiences of similarities in cultural backgrounds with others.</p>	<p>Detached experiences from differences in cultural backgrounds</p>
<p>Functional distance: Levels of participation and engagement based on task-related issues.</p>	<p>High levels of assistant participation in providing opinions, advice, crafting presence and other task-related tasks.</p>	<p>Low level of assistant engagement in task-related issues.</p>
<p>Structural distance: Experience differences arising from asymmetric structures, positions and relations.</p>	<p>Clear asymmetric differences between assistants and remote analysts, and between assistants and managers.</p>	<p>No clear power differences between two parties.</p>

6.3 Examining Distance under Theme I: Establishing Productive Work Relationships

The aim of this section is to understand the role of distance in establishing productive work relationships and how distance helps to explain my findings. I emphasize discussing psychological, cultural and functional distance in both physical and non-physical contexts. I do not explicitly talk about the role of physical distance, because I have introduced above how physical distance plays a facilitating or constraining role in follower-leader interrelations and relationships, but it is related to other aspects of distance and is therefore evident throughout. Besides, it was found that most distancing activities occurred between assistants and remote analysts in non-physical contexts, where they were involved in constructing three types of distance in both proximate and detached settings. Only a few distancing activities took place in a physical context where assistants and managers engaged in relatively more positive and engaged relationships, compared with those in a non-physical context. In the following, my discussion is structured around three sub-themes, *Building Trust*, *Knowledge Sharing* and *Using Non-verbal Clues*.

Building Trust

The assistants' accounts on this sub-theme, *Building Trust*, highlighted the creation of psychological and cultural distance from remote analysts. Trust relates to assistants' positive expectations that their analysts can be relied on. This significant level of trust involves an increased awareness of their analysts' personal characteristics, such as work experience and skills. For example, some interviewees talked about their strong desire to have in-depth communications and strong connections with their analysts. This supports research that indicates how followers view their leaders as charismatic people and role models, and expect to heighten their similarities with them in terms of specific characteristics. In this way, psychological proximity is created and sustained. However, there are other accounts showing that analysts' cultural backgrounds served as an important driver of distrust. Relating the evidence to ideas of cultural distance, I suggest that assistants intentionally or unintentionally, combined their inter-relational experiences with the cultural element to make judgements as to whether they felt it necessary to move closer to or away from their analysts.

First of all, psychological proximity was shaped when assistants demonstrated trust towards analysts in terms of work experience and professional abilities. Some assistants clearly recognized the strengths of their analysts and expected to be '*guided*' (LIN 1 & HAI 1). This emphasis on appreciating personal characteristics highlights that psychological proximity relies on the capacity and opportunities to engage in charismatic leadership (Razin & Kark, 2013). It can be interpreted that the analysts might talk and display

leadership clues in the eyes of assistants; the assistants then viewed the analysts as ‘role models’, perceiving potential similarities to themselves and desiring to heighten those similarities by imitating their characteristics (Shalley & Gilson, 2004, p. 136). Second, psychological proximity was also shaped in terms of analysts’ education backgrounds. It is similar to the first circumstance: Qing, an assistant, developed a very strong willingness to be ‘guided’ by his analyst, ‘*I was always ready to learn knowledge from him and happy to accept critiques*’ (QING 2) (QH3). The assistant was motivated to develop similar qualities to his analyst and sought subjective proximity to him.

According to the accounts above, I can see that when followers and leaders were physically separated, personal characteristics such as work experience, professional ability and education background were very likely to become critical resources to enable connection and proximity that might transcend physical distance. Some claim that followers may lack ‘feeling the leader’s presence’ due to a lack of facial expressions and body language (Avolio & Kahai, 2003, p. 327). But the accounts can be interpreted as offering an alternative interpretation whereby physical distance did not prevent assistants from experiencing leaders and leadership, and so they constructed a certain level of psychological proximity and commitment towards leaders. This also supports one of my perspectives articulated in Chapter 2 (Lit. Review), i.e. physical distance cannot be analysed in isolation, it needs to be understood in terms of other dimensions. Psychological distance is important in these instances, but its relation to physical distance cannot be overlooked, as the latter represents a contextualized challenge or opportunity, which may discourage or encourage assistants to develop relationships with their remote analysts.

Despite a certain degree of psychological proximity, detachment was simultaneously involved with reference to analysts’ education background. Hai’s account is illustrative, as he described his analyst as a person who had ‘*seven degrees from MIT*’, ‘*very special because his intelligence is above everyone else*’ (HAI 3). His reading of the analyst, his education background and his abilities, can be viewed as developing an understanding that the analyst was extraordinary, intimidating and unreachable. Popper (2013) explains that when followers do not access detailed but only abstract and generalized information, they tend to discern leaders as detached. As Hai described, there was a ‘*highly unachievable gap*’ that was ‘*impossible to walk across*’, and so the assistant became unwilling to ‘*ask him (the analyst) many questions*’ (NAI 3). His account offers important evidence that personal characteristics were not always motivating followers to build subjective proximity with their leaders, sometimes it discouraged them to move closer to their analysts, especially when distinct characteristics were viewed as magnified and extraordinary, impossible to be achieved through learning.

Under this sub-theme, *Building Trust*, not only was psychological distance created between two parties, but also cultural distance was involved, indicating culturally embedded experiences of being proximate and detached. Kant's and Ying's accounts of viewing analysts from Taiwan and Japan as '*friendly, gentle and polite*' provide an example of cultural proximity as a form of expressing their connections and commitments to analysts (KANT1 & YING1). Other evidence that assistants viewed analysts from Hong Kong and South Korea as harsh and unfriendly is an instance of cultural detachment from those analysts (HAN1). On the one hand, I can interpret their descriptions as revealing proximity and detachment at a collective level. While there are many critiques of Hofstede (1997), the concept of power distance is helpful here because it helps draw attention to the creation of cultural proximity. Power distance refers to 'the extent to which the less powerful members of institutions and organizations within a country expect and accept that power is distributed unequally' (Hofstede, 1997, p. 28). This means that cultural proximity is generally created and operates when people experience similarities of power distribution in another country, and vice versa (Lewandowski & Lisk, 2013). In the first instance, I can interpret that followers such as Kant and Ying, situated in China, a high-power culture, are willing to adopt and admire their leaders who are also in a hierarchical inequality environment, e.g. Japan or Taiwan (Hwang & Francesco, 2010). In making this judgement, the followers were very likely to implicitly position themselves at a proximate distance from their leaders.

On the other hand, there are accounts that reveal contradictory results to the literature. While followers are suggested to have the tendency of moving closer to leaders who are in similar power distribution environments, I recognize that a few followers such as HAN did not do so. Particularly, as Han pointed out: '*Korean people are all like that, without exception. They push you at very high levels*' (HAN1). Both South Korea and China are often positioned in an asymmetric power environment, which might invoke a degree of cultural proximity between two persons; however, her account indicated that she did not express admiration for the analyst from South Korea, but expressed distrust and dislike towards him. As Han added: '*Koreans treats human as tools, they do not respect them. Because they don't explain why, they just expect you to be fully obedient*' (HAN1). She therefore perceived a certain detachment in terms of cultural background from the analyst. This cultural distance shares some subjective aspects with psychological distance, but it puts emphasis on cultural elements. The examples above illustrate a more nuanced understanding of cultural distance between followers and leaders. Although an examination of cultural distance at a collective level is important to understand the role of different values and beliefs, followers' perspective on distance from leaders is crucial to make sense of what cultural distance actually means to those actors.

Sharing Knowledge

The accounts under this sub-theme highlight the construction of functional distance between assistants and remote analysts, and between assistants and managers. As mentioned above, most distancing activities took place in a non-physical context where diverse ways of sharing knowledge stimulated assistants to move closer to or away from their analysts. A few occurred in a physical context in which positive and productive ways of sharing knowledge contributed to a significant level of proximity between assistants and managers. In this subsection, I discuss how knowledge-sharing reshaped distant relationships between them, and how contextual resources and challenges influenced followers to think and enact relationships. I also offer a glimpse of the interdependence between two contexts, arising from the different ways of sharing knowledge between actors in two contexts, enabling followers to build different relationships with different actors.

Assistants' experiences of receiving support and feedback from remote analysts indicate the creation of functional proximity, i.e. the frequency and quality of task-related communication were improved. For example, Lin engaged actively in discussions with her analyst, when she received encouragement and feedback from her analyst. This supports research by Richard et al. (2013) who propose that leaders' support and coaching help to reduce the distance between leaders and followers, as followers recognize their work as valuable and meaningful. Research by Berson et al. (2015) suggests that functional distance can be significantly reduced when leaders communicate future plans, visions and goals and link followers to specific task performance, and based on these visions and plans, leaders can inspire followers to become more open to new experiences and curious about work goals. Qing's account in this study is particularly useful to explain this perspective. He was encouraged to conduct '*central*' or '*advanced*' tasks, based on his analyst's expectation that he was capable of accomplishing tasks other assistants could not do. He commented: '*I hope to take up more tasks, and they also expect this. My team moves towards this goal and I can take up more central, financial modelling tasks*'. (QING 3) His account reflects how this new work experience and goals not only had a positive impact on his attitude towards the analyst, but also kindled a new kind of collaboration that may result in a more positive and engaged relationship with the analyst. It can be interpreted that when leaders allow followers to engage in tasks beyond normal expectations, there is a possibility of a reduction in functional distance (Anand et al., 2018).

However, there is also a possibility that adjustment and negotiation enabled both parties to continue developing functional proximity in the long term. In Xiang's example, he revealed: '*Initially I felt very happy, wow*' (XIANG 1), but he gradually found it '*stressful*' and felt '*depressed*', because such a '*huge responsibility*' required high levels of professional skill that he lacked (XIANG 1). The account points to a rather more complex construction of functional proximity between two parties. In the beginning, new objectives and new expectations may have been risky and caused a certain degree of stress and uncertainty for this assistant, but he nonetheless recognized that he might lack the skills and abilities to fulfil this important task. But after adjustment to the expectations of his analyst, he felt comfortable with the new tasks and saw them as appropriate for his current ability. I can see that both parties dealt with a potential challenge in their relationships, and they created a new proximity and connection with each other. Thus, the construction of functional proximity was not a one-time effort, but required leaders' continuous and considerable learning about followers, including awareness of when followers might or might not be capable of more.

The analysis of assistants' negative experiences of sharing knowledge enhances our understanding of the construction of functional detachment from remote analysts. As introduced in Chapter 4 (Findings), this involved three negative ways of knowledge sharing: 1) analysts' reluctance to provide support and feedback; 2) analysts' dominance of decision rights; 3) issuing harsh critiques.

Looking at the first form, I see that analysts maintained a certain functional detachment from their assistants, by withdrawing their engagement and communication with them. The analyst explained: '*I do not necessarily answer their questions, because learning by themselves is basic*' and '*I will answer questions when I think it is necessary*' (ZHENG 3). The terms '*not necessarily*' and '*basic*' imply that the analysts might not view answering questions as part of his job and had different expectations of what a financial assistant's role was. There was another possibility, that the analyst made a deliberate decision to withdraw their support. Whatever the reasons, Katz and Kahn (1978) explain that day-to-day immediate feedback may destroy an image of a charismatic leader. In other words, providing feedback may decrease functional detachment (Zhe et al., 2009). In this study, the assistants' experiences have some resonance with this perspective: the accounts in the previous sections show that when leaders provide tailored guidance, followers have sufficient information concerning how to improve their performance and engagement so as to improve proximity; the account here indicates that when leaders promoted followers' own self-control over task performance and became inaccessible, followers were also influenced to withdraw their engagement so as to reduce functional proximity. Leaders, therefore, play a key role in the construction of functional proximity and detachment.

The second way of creating functional detachment relates to analysts' dominance of decision rights. Based on many assistants' accounts, analysts tended to decide on the main arguments of analysis reports, and assistants did not disagree with this, frequently using the terms '*in charge*', '*consistent with my analyst's view*' and '*determine directions*'. This attitude can be understood as enabling structural distance, not functional distance, as a clear unequal relationship was created and maintained between the two parties. But this kind of unequal work relationship indicates clear responsibilities and roles might be clearly stated in work contracts, with analysts responsible for making key decisions while assistants were responsible for conducting detailed tasks. So, my interpretation focus is not on structural distance, but functional detachment, continuously developed and enhanced by their practices. In explaining the reasons why followers often express a high degree of commitment and obedience, Collinson (2006) notes that followers might try to 'shelter in the perceived security of being told what to do and what to think, viewing this as a less threatening alternative to responsibility of making decisions for themselves' (p. 184). In this example, although assistants fully complied with analysts' orders and instructions, this does not mean that they did not dissent or disagree, as such conformist followers might have different levels of commitment to leaders, based on Collinson's (2006) perspective. Rather than challenging the status quo and revealing resistance, they may choose to conceal their concerns and doubts.

Concerning the third negative way of knowledge-sharing, the accounts of assistants' experiences of being subject to harsh critiques also indicated considerable functional detachment from remote analysts. One example of keeping silent and another example of using email history to prove that she did not make errors in tasks resulted in assistants reduced positive communication and engagement with their analysts in the long term. In relation to Collinson's (2006) sense that silence can be viewed as an expression of resistance and dissent, the first example shows that the assistant may have established detachment through the use of silence. Especially the second example can be interpreted as offering an alternative interpretation about functional detachment, compared with previous instances. Here, the assistant sought to establish a more visible distance by using email history to express dissent. This distance might be positioned in terms of knowledge and information the assistant acquired, which is important for her in learning when and when not to put herself forward and establish a distance from her analyst.

In the remaining paragraphs, I turn to discuss that a focus on functional proximity is also reflected in the physical context where assistants experienced high levels of connection and engagement with managers. An important reason is that managers played an influential role in empowering task self-control and open dialogue and communication by talking about '*hobbies*' and '*movies*' and listening to '*unhappy stories*' from assistants. According to Richard (2013), when followers are invited to access necessary and sufficient resources to improve job autonomy, they are very likely to move closer to leaders by engaging in more communication (see also Anand et al., 2018). It is particularly important when those managers can identify

the strengths and limitations of followers, and then offer specific guidance (Zhu et al., 2009). In this instance, managers may position themselves as intimate ‘*supporters*’ of assistants, encouraging assistants to move closer to them.

It is unsurprising to find that physical distance plays an important role in shaping this functional proximity. The interpretations of the non-physical context above highlight the emerging risk of assistants and analysts getting involved in creating and reinforcing psychological, cultural and functional detachment from each other. The key feature of physical separation and distance was itself a condition of these detached experiences. But the accounts of assistants’ experiences of physical interrelations reflected a positive role for physical proximity. An important part of this physical proximity is related to understanding facial expressions and body language, which will be explored in the next section. Here, I want to stress that functional proximity in this context was inseparable from physical distance.

There is another reason why functional proximity between them was created. It is the significant degree of detachment created in the non-physical context that stimulated assistants to act contrarily towards managers. I addressed at the outset of this chapter that proximity and detachment do not just suggest a double stance of followers and leaders, they also highlight the interdependence between physical and non-physical contexts. Based on these accounts, I can see that assistants and managers in the same physical workplace established a significant level of proximity, and this proximity was partly created when assistants had negative experiences of remote analysts and then came to reveal those experiences to managers in a physical context. When assistants were establishing a certain degree of detachment from their remote analysts in a non-physical context, they, intentionally or unintentionally, drew closer to their managers in a physical context instead.

This responds to a limitation of the followership literature that focuses on the role of either a physical or non-physical context and treats individual leaders as capable of managing and dominating contextual meanings. The accounts above call for an understanding of the inseparable relationship between the two contexts, by describing mutual influences between proximity in a physical context and detachment in a non-physical context. As suggested, followers can identify a disconnect from leaders’ policies and decisions, and then facilitate the construction of a ‘back region’ largely inaccessible to leaders (Collinson, 2005b). I interpret that this ‘back region’ in a physical context was not just co-constructed by assistants and managers, but also influenced and shaped by assistants and analysts, as their non-physical experiences of functional, psychological and cultural detachment contributed to this ‘back region’.

Using Non-verbal Clues

In this subsection, I conduct an analysis of how assistants' accounts of experiencing non-verbal clues in two contexts shaped structural detachment from and functional proximity to remote analysts. My analysis casts light on the relation between an understanding of using non-verbal clues and an examination of distance, which is inadequately explored by the literature. Given the influential role of physical distance, an important question that must be asked is how followers and leaders establish and develop their communications when they are geographically separated. As Avolio and Kahai (2003) suggest, highly connected information technology is 'creating new patterns of who has access to information and how information is acquired, stored, interpreted, and disseminated' (p. 68); yet there are limited studies applying the notions of distance to the use of technology and communication tools; especially, few scholars direct their attention to the ways in which followers experience the distance or relationships brought about by specific tools. The following interprets how assistants perceived and experienced distance via different non-verbal clues arising from different tools in a non-physical context, and also analyses assistants' experiences of distance in a physical context.

To begin with, rich evidence illustrates that some analysts employed telephone voice and email text to help issue instructions and orders so as to create an unequal relationship with assistants. For example, in Wei's case, during email communication, his analyst always used '*one sentence*' and '*brief language*' to issue tasks, instead of detailed explanations (WEI 1). Wei perceived these emails as '*program orders*' and '*instructions*', leaving limited room for further communication and negotiation. As analyzed in Chapter 4 (Findings), while no further account can explain what the analyst's intention was, it is nonetheless evident that the analysts wanted to deliver instructions efficiently, which was part of their job. In this case, a whole sentence was often broken down into several shorter and separate components, such as '*this looks good*', '*this hasn't been said*', '*very, very impersonal*'. This has resonance with research by Hill et al. (2014), who suggest that this is an important way of undermining empowerment via electronic communication, as leaders, consciously or unconsciously, simplify feedback and orders, and gain the chance of distinguishing themselves from assistants. In Darics' (2017) opinion, these short phrases are particularly useful to prevent followers initiating conversations and increasing awareness that leaders' orders are unquestionable. Drawing upon scholars' viewpoints, I can interpret that this email practice resulted in a certain degree of detachment in terms of perceived asymmetry.

Moreover, the assistants' experiences of telephone communication also highlighted a structural detachment from remote analysts. Kant's account of her reflections on feeling the analyst's voice had a '*gentle, polite tone*', for instance, suggests a possibility that her analyst was creating a perception of charismatic leadership via voice, which has been recognized in the literature on political leadership (Schyns & Mohr, 2004). Ying's account of her reflections on feeling her analyst's voice had '*a serious tone*' and '*high volume*', for example, suggest that the leader was engaged in creating a perception of leadership in a coercive way. This has some resonance with Remland et al.'s (1994) work that explains that speaking in a soft voice enables followers to relate to a perception of supportiveness, while speaking in a firm voice may be perceived as being unsupportive. In this case, Ying chose to conceal her questions and concerns, and often kept silent, noted previously. It can be interpreted that this may be a deliberate way of avoiding attracting unwanted attention from her analyst. Whatever her intention, she positioned herself at a distance from the analyst, and at the same time did, nonetheless, accept and strengthen the unequal relationship with him.

So far, I have addressed how assistants and analysts incorporated email and telephone to co-construct structural distance in a non-physical context. However, in a few instances, assistants gained opportunities to work with analysts in a physical context, as assistants travelled to analysts' workplaces and worked there for a few weeks. This latter positive experience highlighted the possibility of developing a sense of mutual understanding and personal interconnection, thereby creating functional proximity to each other in terms of the frequency and quality of communication and engagement. As some assistants mentioned, physical interaction '*reduces misunderstandings and gives direct feelings*' (HAN 2). Here '*direct feelings*' may be related to the use of facial expressions and body language, which are viewed as 'the main carriers of emotional communication' (Purvanova and Bono, 2009, p. 344). In this case, analysts were likely to exhibit and maintain non-verbal elements to show their inspiring power (e.g. Awamleh & Gardner, 1999). Of course, their '*eye contact*', '*smiles*', head '*nods*' and '*shakes*' indicate diverse meanings. For example, it is suggested that frequent and intense smiles allow followers to attribute high charisma to their leaders (Shea & Howell, 1999), and direct eye contact can improve the experience of power (Aguinis & Henle, 2001). While these accounts did not explicitly reflect the assistants' experiences of experiencing a smooth or unequal relationship, the accounts at least reveal that assistants and analysts engaged in considerable communication and interaction, developing functional proximity to each other.

6.4 Examining Distance under Theme II: *Managing Surveillance*

In this section, I use the theme of *Managing Surveillance* to illustrate the construction of structural distance in two contexts. In the previous section, I mentioned how the use of non-verbal clues created equal and unequal relationships between assistants and analysts. Yet, the notion of structural distance is far more complicated than this, when taking into account camera surveillance and managerial surveillance. On the one hand, there is evidence from managers and a few assistants showing a degree of eye-to-eye monitoring from managers of assistants' behaviours within offices. But most assistants' accounts revealed a contradictory situation, in that they did not experience surveillance and discounted the managers' roles. On the other hand, concerning camera surveillance, their experiences of being watched and monitored were much more obvious than those under managerial surveillance. Responding to office and door cameras, it was found that, most of the time, assistants chose to behave in the way expected by remote analysts, while sometimes they engaged in certain resistance activities to challenge the cameras.

I suggest that the structural distance at issue here is more related to everyday interrelations that produced and reproduced new meanings of what constitute equal or unequal relationships between assistants and analysts, between assistants and managers. While there is important research on leadership distance in terms of the structural dimension (Antonakis & Atwater, 2002; Shamir, 1995), it maintains a conventional viewpoint that structural distance derives from formal positions and structures and fails to consider the issues of relational dynamics between followers and leaders, which may reinforce or question the exercising of leadership control. In particular, the current work on distance does not explicitly address the potential and impact of surveillance on distance. Responding to this limitation, I theorize structural distance in terms of surveillance to gain an in-depth understanding of the relationship between surveillance, leaders' efforts to control, and followers' efforts to cope with being controlled. In so doing, I add to our understanding of the complexities and interdependencies involved in follower-leader relationships and specific physical and non-physical contexts.

Camera Surveillance

In Chapter 4 (Findings), I illustrated that camera surveillance performed a prominent role in a non-physical context, where assistants' movements were constantly observed by cameras. I also highlighted that assistants strived to cope with this situation in various ways. In this subsection, I further discuss how the analysis of assistants' experiences of dealing with camera surveillance enhances our understanding of the complex nature of the structural distance between two parties.

My argument concerning structural distance is based on Foucault's (1975, 1977, 1979) ideas of disciplinary power and his interpretation of the Benthamite model of the panopticon. Drawing upon Foucault's work, surveillance can be viewed as a pervasive and creative, and sometimes dangerous, expression of power relations in contemporary organizations (Knights and Willmott, 1989; Sewell & Wilkinson, 1992). I will discuss how camera surveillance, especially by door cameras and office cameras, played a key role in creating an asymmetric relation between assistants and analysts, focusing on how cameras induced assistants to accept and shape desired norms, and become compliant to a significant degree towards remote analysts. I will continue by drawing upon assistants' accounts of their experiences of engaging in resistant activities to illuminate the possibility of countering this stable or fixed nature of structural distance between two parties, emphasizing how assistants employed and manipulated the decentralized and intangible features of cameras. In this way, I can establish my argument that the structural distance at issue here should not be confused with the structural constraints or repressive force that are applied to assistants; rather, it can be viewed as more complex and dynamic than what is recognized in the literature

To start with, the assistants' accounts of camera surveillance reflected a significant degree of inequality in relationships. That is, structural detachment existed. In their eyes, analysts sought to employ door and office cameras to watch and monitor their behaviours. These cameras had the effect of creating self-disciplined behaviours, which scholars have explored under the heading of surveillance (Grey, 1994). For example, under the gaze of door cameras, assistants obeyed the rule that they cannot '*lift arms to take pictures of screens*' (YING 6); working under office cameras, they often chose to keep working in offices for a long time. This has resonance with what Foucault (1977, 1979) argues in his work, that self-disciplined behaviours stem from disciplinary power, which does not exist externally, but is shaped in micro-interactions where people are subjected to the modalities of power and then become part of this disciplinary system. In this case, it is unsurprising to see that the most common way in which the assistants coped with cameras was doing what they were expected to do. This reflects a significant degree of compliance and obedience emerging from this physical context, so camera surveillance achieved the anticipated results.

An important question arises here: is it the power of cameras inducing or forcing assistants to act in such a self-disciplined way? While these cameras are important in shaping this asymmetric detachment between assistants and analysts, their potential and direct relevance to those assistants need to be carefully examined. In the following, I pay specific attention to how cameras were operating invisibly but pervasively over assistants, developing a nuanced understanding of how structural detachment was constructed in terms of cameras. Before this, I want to illustrate disciplinary power using Foucault's interpretation of Bentham's idea of the panopticon. The concept of the panopticon is not just a vivid way of showing how discipline is implemented, it also resonates with the analysis of camera surveillance.

According to Foucault (1975), the panopticon is a machine 'for dissociating the see/being seen dyad: in the peripheric ring, one is totally seen, without ever seeing; in the central tower, one sees everything without ever being seen' (p. 202). Within such a system, people become subjected bodies and they render themselves visible, calculable and self-disciplined, ultimately. This panoptic structure is similar to how I describe structural detachment under camera surveillance. Based on the above accounts, I can see that while the assistants were aware of the risk of being monitored, they were still uncertain whether remote analysts were watching them constantly, when they would be punished and what extent of punishment they would endure. Especially, the managers and analysts I interviewed did not mention the cameras at all, and some changed the subject when asked about their perspective. As Foucault (1977) notes, the panopticon or surveillance is not simply a monitoring machine, but also a kind of social-material assemblage for sorting and arranging assistants into subordinate positions. The power of the camera was characterized by ambiguities, uncertainties and multi-interpretations; I can interpret how, for this reason, many assistants chose to self-discipline themselves to a large extent, avoiding any risk of being punished. Structural detachment, therefore, was constructed and sustained by assistants themselves who may be influenced by the cameras.

Moreover, remote analysts also contributed to establishing this structural detachment, by exercising leadership power in 'more disguised and concealed' ways (Collinson, 2020, p. 10). As mentioned above, the analysts I interviewed were largely silent on the details of camera surveillance. This can be interpreted as a way of increasing the uncertainties and ambiguities around this issue, whether intentional or unintentional, highlighting the assistants' awareness that there is at least a degree of danger of being watched and punished in terms of misconduct. This interpretation supports McCabe's (2013) research on surveillance, drawing upon Kafka's novel *The Castle*, which suggests: '*the Castle* operates through "distant" authorities that are never seen and sometimes decisions are made as if by the official machinery itself without the aid of the officials' (p. 64). Functioning in a similar way to the *Castle*, analysts conducted camera surveillance from a certain physical distance and provided limited information and regulations on punishment, inducing assistants themselves to learn to be self-disciplined. In this way, instead of physical

distance, the structural distance between those who exercise power and those who are subject to disciplinary power becomes intensified and reinforced.

Nevertheless, although both parties seemed to sustain and reinforce this structural detachment, this is not to conclude that followers were fully compliant with these asymmetric relations and the relations were totally repressive and constraining. According to Sewell and Barker (2006), ‘the disciplinary effects of workplace surveillance have been exaggerated and opportunities for employee resistance still exist’ (p. 948). In drawing upon Foucault’s work to analyze follower-leader distance in this way, there is a risk of objectifying their relations as stable and fixed, so that self-disciplined assistants are equated with an ‘empty vessel waiting to be led, or even transformed, by the leader’ (Goffee & Jones, 2001, p. 148). In the remaining part, I move my attention to the assistants’ accounts revealing resistant activities through which to advance an understanding that followers become “skilled choreographers of self, using impression management techniques” (Collinson, 2020, p. 12; Goffman, 1959), especially when they were increasingly aware of themselves as watched objects. I can then develop the argument that structural distance is much more dynamic and shifting than what is portrayed in the literature on leadership distance.

In moving beyond Foucault’s concept of disciplinary power as all-determining, Whitaker raises an important argument in his book ‘The End of Privacy’ (1999): the Benthamite model of the panopticon is outdated, as technological advances offer a new conception of the panopticon with distinct features of ‘intangible’ and ‘decentralized’. First, ‘intangible’, in this study, means that the value and power of cameras was abstract and ambiguous, although they have physical shapes that are noticed, As discussed above, this feature may induce assistants to become self-disciplined and reinforce the asymmetric relationship with remote analysts. But at the same time, this may also give these assistants a chance to discount the cameras’ influence, based on their accounts reflecting that sometimes they forget the cameras’ existence while working. At this point, I interpret that the assistants did not fully forget the cameras, but related the intangible features of cameras to develop a strategy of devaluing camera surveillance and challenging the situations of being observed and monitored. After all, unlike a physical watchman who is employed to watch over prisoners, this new watchman, cameras, in a less tangible form, may enable assistants to overlook the fact that they were under surveillance at all. Hence, this strategy combined with the intangible nature of cameras was important in expressing a degree of dissent and dissatisfaction towards asymmetric relations.

The second character of 'decentralized' cameras offers a deeper explanation of structural distance. In Foucault's (1975) view, a perfect panoptic structure would be 'a central point that would be both the source of light illuminating everything, and a locus of convergence for everything that must be known; a perfect eye that nothing would escape and a center towards which all gazes would be turned' (p. 173). However, regarding the camera surveillance in this study, there is no such centralized effort that makes every person feel isolated from each other and keeps them disciplining themselves. Decentralized, in this sense, means the absence of a physical watchman or force. I suggest that this decentralized feature may compromise the effectiveness of the panoptic power of the camera. The assistants' accounts show that assistants often escaped the cameras altogether by seeking '*places away from the cameras*' for temporal conversations with peers (YING 7). There was no such force that isolated assistants from each other; instead, they communicated with each other and even colluded to challenge the surveillance power. These experiences highlight that although camera surveillance may have a legitimate role in improving every one's performance, personal freedom and discretion were not sacrificed in terms of concealed collaboration and support. My argument here is that when surveillance became decentralized and subtle, by placing gazes everywhere in the offices, its power did not derive from a hierarchical centre, but relied on the intensity of every assistant. In this situation, there emerged a possibility that the power was being challenged and transformed, and it may become less repressive and effective than traditional forms.

My overall argument is that structural distance in terms of camera surveillance can be much more dynamic and ambiguous when those assistants were increasingly aware that they were visible objects and their leaders were exercising control in coercive ways. This means that in this non-physical context, although disciplinary behaviours became pervasive, there are still new possibilities that cannot be fully anticipated and explained in relation to the idea of power mechanisms alone. Rich evidence indicates that assistants displayed a significant degree of thinking, evaluating and enacting, and contributed to unintended and contradictory consequences. As suggested by Iedema and Rhodes (2010), camera surveillance stimulates the watched person to 'reflectively reconsider his or her relationship with herself or himself' (p. 211). The space under surveillance can be extended and creative, encompassing different beliefs, interests and actions.

Managerial Surveillance

In this subsection, I demonstrate how managerial surveillance contributed to constructing, developing and transforming the structural distance between managers and assistants in a physical context. On the one hand, in contrast to camera surveillance, managerial surveillance appeared to function in a much more traditional way: eye-to-eye monitoring of assistants' behaviours, intended to establish a clear separation from assistants. On the other hand, assistants' accounts reflected developing a very complex understanding of distance, particularly relating to situations when these assistants tended to discount this form of surveillance. Their experiences highlight that while there was a certain degree of asymmetric differential shaped by managerial control, structural detachment may be shaped in relation to a significant degree of proximity between two parties. I will focus on how managers played a critical role in empowering assistants to control their own tasks, and inducing them to reinforce mutual proximity, which implicitly reinforces the asymmetric relationships in-between. I will also pay attention to how assistants made use of so-called proximity to challenge and transform these asymmetric relationships with managers. In addition, I will explain how their relationships in one context (physical or non-physical context) potentially triggered the redefinition and reconstruction of relationships in the other.

First of all, there is at least some degree of formal hierarchy that existed between managers and assistants. Clear positioning as superior and subordinate called for a minimal level of agreement as to how task performance should play out. Based on this, managers conducted and enhanced their responsibility through eye-to-eye monitoring, that is, '*star(ing) at someone, remind(ing them of) their work progress, and explain(ing) operating issues on how to communicate with analysts via emails*' (TU 3). I can interpret that the managers were acutely aware of this opportunity to differentiate themselves from assistants as two different groups, and intended to use their eye-to-eye surveillance to further reinforce this asymmetric distance. This supports research in leadership distance where many scholars have attributed distance to formal structures and positions. As Srinvas (1999) points out, 'bureaucratic organizations increase social distance. The division of labor, the hierarchy of command and execution ... increasing our distance from the Other' (p. 611). Status and distance mutually reinforce each other: status creates distance and distance creates power and status differentials (Shamir, 2013).

However, the available evidence highlighted that many assistants discounted managerial surveillance so as to de-emphasize structural detachment. They felt the workplace environment was '*less hierarchal*', '*friendly*' and '*relaxing*'. Some said that they did not clearly experience a sense of monitoring of their behaviours. Instead, what they often mentioned was that, while at work, they talked about '*hobbies, movies and other personal topics*' with managers and organized '*hiking*' at the weekend (YING 5, KEN 2). These accounts support Napier and Ferris' (1993) viewpoint that the distance between supervisors and subordinates is inherently questionable, and there is no construct so fundamental to determine interpersonal interaction. That is to say, a degree of formal asymmetry did not imply that their distance was relatively

fixed and stable. As Collinson (2005b) argues, distance cannot simply be assumed, as micro-interactions in everyday contextual settings play a key role in shaping the dynamics and distance between leaders and followers. One interpretation drawing upon the assistants' accounts is that managers as leaders deliberately promoted proximity with assistants to boost harmonized and smooth relations, thereby sustaining their leadership control over asymmetric detachment from the assistants. Instead of conducting coercive monitoring, managers chose to define and reinforce positive, engaged and productive relationships with assistants, so as to increase the ambiguity of status differentials. This is consistent with Collinson's (2020) point: leaders' power can be operated in more disguised and concealed ways. Managers acted to challenge the traditional manager's role of direct monitor (Huy, 1999, 2002), and they believed it necessary to build up emotional connections with assistants, instead of technical connections (Katz and Kahn, 1978).

However, managerial surveillance should not be overstated as an oppressive force eliminating follower discretion and judgement on their distance from managers. At this point, I suggest that this structural proximity may partly derive from an increased awareness of their situation as valued objects and managerial surveillance in a subtle and concealed way; the assistants then preferred to implicitly accept and make use of this proximity to voice dissent and dissatisfaction towards managers. In this way, structural proximity is not just a way of expressing commitment and loyalty, but also reveals deeper conflicts, dissent and resistance towards managerial surveillance. It is evident that assistants treated managers as '*unimportant actors in our work relationships*' (FANG 2), in contrast to remote analysts; in their eyes, managers merely addressed '*life-related*' issues while analysts dealt with '*technical-related*' issues (WEN 3 & HAI 4). These accounts reflected that the assistants intended to classify managers and analysts into two distinct groups, and privileged remote analysts while downplaying managerial influence. It seems that these assistants were particularly concerned with the different roles managers and analysts played. One important way to sustain their relations with those managers was through involvement in the co-construction of proximity with them. Proximity could be understood by the assistants as an effective way to shelter themselves in perceived security, and to express themselves freely. In other words, they may take advantage of so-called empowerment to '*camouflage*' their actions and expand room for their autonomy and independence (Collinson, 2005b, p. 241). Therefore, structural proximity entailed a degree of oppositional intent, whose impact undermined managerial control and power.

Last but not least, I further suggest interdependence between physical and non-physical contexts, due to the interplay between actors in the two different contexts. As stated previously, structural detachment under camera surveillance in the non-physical context revealed a considerable extent of detached, conflicted and separate relations between assistants and remote analysts, while structural proximity in the physical context showed a degree of positive and smooth relations between assistants and managers. Based on this evidence, it is reasonable to interpret that the two types of distance were not mutually exclusive, but rather influenced and reinforced each other. This proximity with managers partly emerged when assistants talked with

managers and told 'unhappy' stories about collaborating with analysts. In this way, when these assistants were attempting to move away from their analysts through these stories, they were, intentionally or unintentionally, simultaneously drawing closer to their managers in the physical context. In a similar manner, a considerable detachment from remote analysts can be understood as being partly caused by experiences of proximity with managers. Accordingly, this moves away from a narrow understanding of the followership context in the literature towards a new understanding that the two contexts are inseparable and mutually reinforce each other.

6.5 Examining Distance under Theme III: *Managing Presence*

The aim of this section is to analyse how assistants managing their presence demonstrates the construction of functional distance. In the previous section, what I emphasized was assistants' multiple responses towards surveillance; now I direct my attention towards how they actively and proactively made use of email and telephone to create and navigate proximate and detached relationships with remote analysts. Theorizing functional distance in this way demonstrates their practices as creative and strategic and allows a nuanced understanding of followers' efforts to construct distance and their relationships with leaders in a non-physical context. As such, invoking functional distance as an important aspect of follower-leader distance has the potential to challenge a narrow conception of followership relationships and followership contexts.

There is rich evidence showing two ways of constructing a significant degree of functional proximity, involving high levels of engagement and communication in task performance. They are *providing timely responses* and *matching working hours*, which are two sub-themes of the major theme. To begin with, *providing timely response* denotes how assistants employed email and telephone to offer timely and efficient responses to remote analysts, so as to improve engagement and communication on tasks and reduce the distance between them. It was found that assistants chose to reply to analysts' emails '*within seconds*', imagining that '*every second was counting*' (WEN 4); they also '*picked up calls very quickly*' (MEI 3). By this point, I could see that email and telephone with their different features enabled assistants to create proximity with analysts in different ways. Email normally has a time lag, so most of the time the assistants wanted to reduce the delay and thereby avoid disconnection; concerning the telephone as a synchronic tool, picking up calls immediately was a powerful way of improving connection. An examination of these accounts resonates with what Kahai (2013) refers to as 'constant contact', which is crucial for shortening functional distance, because 'successive communications are nearer in time ... leaders and followers are more accessible to each other than before' (p. 79). At this point, I want to highlight that while the existing work on leadership distance in a non-physical context tends to focus on the leader's role in building up connections with followers, there is rich evidence demonstrating that followers play a key role in overcoming physical constraints and connecting with leaders in order to improve their relationships with them.

Functional proximity was also evident, when assistants made efforts to *match their working hours with analysts*. The assistants' accounts show that they attempted to match analysts' working hours, including when to start work, when to have lunch and when to finish work. Indeed, different locations and different working timetables posted new challenges for ensuring timely and effective task execution. To deal with this problem, assistants actively built up their connections with remote analysts, by aligning their working hours with them. A typical example is that many assistants often worked late at night: '*My analyst was still working there, how can I leave earlier than him?*' (KANT 4) In this account, the assistant intended to create an experience of interconnection or being there together with the analyst, through staying late at night with analysts at a different location. This increased the number and length of real-time conversations and maximised communications, creating a non-physical environment where they were constantly accessible to remote analysts. While this example is merely one of many drawn from the study, the insights from this example add new meanings to our understanding of how followers interrelate with leaders and establish relations in non-physical contexts. It suggests that followers viewed matching working hours as a powerful way of constructing proximity with remote analysts, the example challenges the current work on leadership distance, which fails to address this practice and its effects on follower-leader relationships.

So far, I have demonstrated the significance of functional proximity through *providing timely responses* and *matching working hours*. There is other evidence demonstrating that this proximate relation was not so stable and harmonized, but was in fact characterized by conflict, friction and uncertainties. In other words, functional detachment was also involved in the assistants' practices of managing presence, revealing a low level of engagement and communication. On the part of analysts, they, intentionally or unintentionally, delayed taking calls from assistants, making them inaccessible to assistants. As one assistant complained, '*We have to wait for them when they are free. Or we have to sit in the office all day, because I'm afraid of failing to answer calls from the analysts*' (WEN 5). This example of delayed connection resonates with analysts' other practices, including reluctance to provide feedback and support, which is discussed in section 6.2. It is unrealistic to think that all analysts will have the time to sustain high levels of interaction with their assistants; yet, this is not to say that analysts did not know how to influence assistants' behaviours, based on the rich evidence previously presented. Such situations seemed to reveal that the analysts were striking a delicate balance between engaging in connection and withdrawing their accessibility. This not only enabled assistants to perceive analysts as detached and inaccessible, but also allowed them to accept and enhance this low level of engagement.

On the part of assistants, they engaged in transforming working with analysts at a distance in four ways: 1) delaying replying to emails; 2) shifting from telephone to email; 3) engaging in their own activities during working hours; 4) playing tricks during call meetings. I selected two typical examples to illustrate how functional detachment occurred through assistants' efforts. The first example is to play tricks during call meetings. An assistant revealed how he often pretended to attend a telephone meeting and at the same time was doing other tasks. In this case, the assistant took advantage of the invisible nature of physical separation and said 'errm', 'yes' and 'ok' only to maintain a degree of engagement ((JACK 2). This supports Kahai's (2013) research suggesting that 'the digital nature of communication via electronic channels makes it easy to store, duplicate, forward, and manipulate the message' (p. 70). In this way, a leader may be easily misled by a follower who may manipulate communication and create a distance from the leader.

Another example is the assistants' experience of actively shifting from telephone to email, since '*the telephone is pushy but email is relaxing*' (QING 5). This is in a sharp contrast to assistants' efforts to provide a timely response via telephone and email, with the aim of improving accessibility and connection to remote analysts. In this example, the idea of 'resistance through distance' was much more evident (Collinson, 2006, p. 185). By shifting from synchronized to asynchronized communication, the assistants tended to create and separate their own response speed from the expected speed, privileging the former and de-emphasizing the latter. In this way, they kept a distance from their analysts. This example also supports the dramaturgical notion of followers (Collinson, 2006), who were clearly aware of the expectations and demands of leaders, they became 'skilled manipulators of self and information' (p. 185). The assistants were still complying with the analysts' expectations of providing a timely response, but meanwhile they employed the asynchronized feature of emails '*rehearse*' and '*reprocess*' what and when to deliver (Baralow & Tsoukas, 2015), thereby reducing connection frequency and keeping a distance from the analysts.

6.6 Examining Distance under theme IV: *Cultivating Belonging*

This section describes assistants keeping a psychological and functional distance by cultivating belonging to peers in the physical workplace. While the previous sections largely focused on the interrelations and relationships developed between assistants and remote analysts, and between assistants and managers, this theme is primarily concerned with assistants' strong attachment and connections to peers. It illuminates how assistants interrelated with each other to create subjective proximity and detachment in terms of perceived similarities and differences in personal characteristics and the nature of tasks, and to create a high degree of functional engagement and communication. Theorizing distance in this way offers an in-depth understanding that follower-leader relationships were also influenced by followers' interrelations with peers, based on which followers were enabled to grow new senses and navigate ways of developing their relationships with different leaders in two different contexts. Theorizing distance in terms of peer interrelations also promotes an understanding of how interrelations in the physical context influenced and were influenced by interrelations in the non-physical context, shaping inter-dependent meanings of the two contexts, which are under-developed in the followership literature.

To start with, this involved psychological proximity being established between assistants in terms of perceived similarities in personal characteristics and the nature of the job. In previous sections, I illustrated how assistants constructed psychological proximity towards analysts in terms of analysts' personal characteristics, such as work experience and professional skills. The literature also identifies attributions such as degree of information transparency (Popper, 2013) and vision communication (Berson et al., 2015) performed by individual leaders. Yet, there is little knowledge about how followers perceive and create psychological proximity towards peers or colleagues, instead of leaders. The accounts reveal that 'similarities in age, educational experience and hobbies' and 'similarities in jobs' (XUE 4) enabled assistants to become close 'friends' (WEN 7). At this point, I cannot deny that direct and physical contact between assistants was a central aspect of the explanation of this subjective proximity. As Liberman et al. (2007) define psychological distance, it relates to 'a direct experience of here and now. Anything else – other times, other places, experiences of other people, and hypothetical alternatives to reality, are a mental construal' (p. 353). This definition highlights that the physical or geographical proximity between assistants enabled them to engage in personal conversations on topics including age, education background and hobbies, thereby moving closer to each other at a subjective level. This is in contrast to the psychological proximity to remote analysts, where they did not have much physical contact.

Furthermore, the assistants' accounts reflected a considerable level of functional proximity, that is, engagement, communication and mutual support emerging from assistants. Particularly interesting, these assistants' experiences involved certain behaviour norms co-created and shared among assistants. It was

found that they sometimes ‘helped each other to pick up calls from the analysts’ (WEN 7). This supports Endrissat and Arx’ (2013) research on leadership context: leaders and followers create and use behavioural patterns to solve typical problems; eventually, these patterns represent important features of the leadership context. In this case, I can interpret that shared norms may also start to shape how assistants should behave in the physical workplace. As suggested, a high degree of functional proximity together with shared norms may constitute a different ‘back region’ inaccessible to remote analysts and managers (Collinson, 2005b). One ‘back region’ was addressed in the section 6.2, where assistants talked with managers about negative interactions with remote analysts. Yet, the example here shows a new possibility whereby assistants mutually supported each other to constitute a ‘back region’ with the aim of hindering manager accessibility. Accordingly, the proximity among assistants contained forms of follower dissatisfaction and resistance.

My interpretation, which deals with functional and psychological proximity among followers, is somewhat different from the ideas in a number of followership studies on peer relationships. The latter believe that most peer relationships can contribute to positive relationships between followers and leaders (Chaleff, 2008; Howell & Mendez, 2008; Stech, 2008). For example, followers can co-lead teams, manage each other in a positive way, and even provide emotional support to peers; these are important drivers building up positive and trustworthy relationships with leaders (Cunba et al., 2013). Yet, my accounts reflecting functional proximity among assistants challenge this perspective and propose that so-called positive and engaged peer relationships may encourage followers to give more consideration to their own interests, expectations and voices, although they still comply with leaders’ goals, visions and orders. More importantly, it is possible to see that functional proximity among peers was an important driver influencing and shaping the relational dynamics with managers and remote analysts. As addressed previously, there emerged some interplay among actors in the two contexts. Here what is considered was how the assistants’ interrelations among themselves influenced their understanding and judgements of their relationships with managers and analysts.

However, when I address the fundamental issue of functional proximity among assistants, there is other evidence showing the emergence of psychological detachment in terms of perceived differences in personal characteristics. A few assistants expressed sensitivity about ‘specific skills and abilities’ (HAI 2) and an ‘excellent education background’ (YING 9). Howell & Mendez (2008) has suggested that peer pressure is becoming a new challenge for followers, and this pressure may derive from ‘team expectations’, reflected in team norms and objectives (p. 37). In Ying’s account, *‘I’m a bumpkin among my colleagues, because they studied abroad from junior school’* (YING 9). I can see that she experienced and made a clear distinction between her education background and peers’ backgrounds. This can be considered subjective detachment, which originated from a feeling of respect or admiration for a leader or others who were perceived as more experienced or complete (Popper, 2013). Other assistants’ accounts also reflected a clear distinction between ‘workplace friendship’ and ‘real friendship’. The term *‘real’* clearly expressed a sense

of suspicion and uncertainty about this proximate relationship with peers. It is possible to see that the followers did not just identify similarities with peers in terms of personal characteristics, but also found differences in terms of characteristics. Hence, I propose here that the distance between assistants in terms of functional and psychological dimensions was not durable or fixed, but was continuously developing and transforming in the long term, depending on their everyday interrelations.

6.7 Conclusion

This chapter has conducted a theoretical discussion of the key findings structured by four themes. From the discussion, a number of insights to the existing followership literature have been obtained. I briefly outline two key insights before I present the two major theoretical contributions in the final chapter.

The most important insight has been generated through the development of the overarching concept of follower-leader distance, which demonstrates how assistants interrelated with managers, remote financial analysts and peers to establish their relationships in physical and non-physical contexts. These kinds of relationship are shown in an analysis of five dimensions, and they can be considered multiple, dynamic and constructed, with the followers' capability to understand, learn and manage their interrelations with those actors. In the Conclusion (Chapter 7), I will explain how this key insight makes a significant theoretical contribution to the existing literature and expands our understanding of the dynamics of follower-leader relationships.

The other important insight relates to two degrees of follower-leader distance, the ways in which the two contexts shaped and were shaped by followers' interrelations with other actors, which in turn became distinct contextual opportunities and challenges followers needed to address. This means that how followers engage with others is significantly influenced and shaped by specific contexts that may facilitate or constrain their understandings and behaviours. In the next chapter, I will suggest that this insight helps to develop a more nuanced understanding of the nature of physical and non-physical contexts in particular and the complexity of followership in general.

Chapter 7: Conclusion

7.1 Introduction

This final chapter has four sections. First, I revisit the research aim, research questions for this study and the limitations of our knowledge about followership. Second, I propose two principal theoretical contributions of the study. Next, I propose future directions for followership research, introduce how I intend to move forward, and present the limitations of the study. Finally, I present sincere personal reflections on the whole research journey and on the global impact of COVID-19 on remote working, which provides an opportunity for further exploring followership.

7.2 Knowledge Limitations, Research Aim and Research Questions

The topic of followership is receiving growing attention in the followership field, as it potentially moves away from a leader-centric assumption in leadership research (Bligh, 2011; Carsten et al., 2010; Uhl-Bien, 2014; Riggio, et al., 2008). However, it is argued that followership research is following a similar trajectory to leadership research, by identifying effective followership models and effective followers (Collinson, 2006, 2011, 2014; Einola & Alvesson, 2019; Ford & Harding, 2015; Tourish, 2014, 2015), because this body of work is underpinned by a conventional managerial focus on followers' contributions to organizational performance (Collinson, 2011). Consequently, a follower is simply placed within a traditional asymmetric structure in relation to a leader, and he or she still remains 'an empty vessel waiting to be led, or even transformed by the leader' (Goffee & Jones, 2001, p. 148).

As highlighted in the literature review (Chapter 2), I note two significant research gaps identified in the followership literature. First, existing studies tend to investigate followers in isolation from leaders, other actors and their situated contexts, and to reproduce a binary oppositional relationship between followers and leaders. Although the dominant followership approaches, including trait-based and role-based approaches, have identified follower characteristics, traits and roles as important aspects of followership (e.g. Carsten et al., 2010; Kelley, 2008; Sy, 2010), they implicitly assume that followers are situated in formal positions and hierarchies. This may repeat the mistakes of traditional leadership studies that focus exclusively on individual leaders (Collinson, 2011; Ford & Harding, 2015) and fail to conduct a nuanced analysis of how follower-leader relationships are shaped and reshaped. To advance this work, this study

suggests that how followers interrelate with leaders and peers to construct their relationships so as to influence shaping follower-leader relationships is a central question to be explored in the followership field.

The second gap is a narrow viewpoint of the complex nature of physical and non-physical contexts where followership and follower-leader relationships occur. Prior studies have started to recognize different types of followership contexts in terms of different contextual opportunities and challenges followers may need to cope with (Uhl-Bien & Carsten, 2016); however, they undervalue the importance of the impact of follower-leader interrelations on shaping the meanings of contexts. A hierarchical context where followership occurs, for instance, is merely described as a setting where followers have to adopt and obey leaders' directions and instructions, arising from formal positions, to a large extent (Carsten et al., 2010; Kelley, 2008). This has the danger of undervaluing the importance of the dynamic and constructed nature of context. To advance this work, i.e. to explore how physical and non-physical contexts influence and are influenced by follower-leader interrelations, is a further important question to be considered in followership research.

Responding to two research gaps I have identified in the followership field, this study aims to explore followership as a complex phenomenon in terms of follower-leader relationships in physical and non-physical contexts. To achieve this, informed by a critical approach to studying followership, this study shifts the research gaze away from viewing followership as an internal and individualistic phenomenon measured and identified by various personal characteristics and traits, towards viewing followership as a social, dynamic and inter-relational phenomenon. Accordingly, this study develops two research questions that focus on addressing two research gaps, respectively, in the literature:

Q1: How are follower-leader relationships shaped and reshaped through followers' interrelations with other actors?

Q2: How do physical and non-physical contexts influence follower-leader relationship construction?

7.3 Theoretical Contributions

There are two specific theoretical contributions arising from the key insights of the study. The beginning of this section offers a brief summary of the two contributions and the following paragraphs provide the details. First, bringing the dynamics of follower-leader relationships into focus, especially analyzing the multifaceted, dynamic and tense aspects of relationships, can extend our limited knowledge of the binary oppositional relationship between followers and leaders. Second, developing a more nuanced analysis of how physical and non-physical contexts shape and are reshaped by follower-leader relationships, especially conceptualizing the constructed and interdependent nature of the two contexts, can extend critiques of the followership context to settings where followers are confined within hierarchical structures, and inform a broader interpretation of the complexity of the followership context and the followership phenomenon.

To answer my first research question – *How are follower-leader relationships shaped and reshaped through followers' interrelations with other actors?* – This study has provided rich findings to suggest that the development of follower-leader relationships rests on the construction of follower-leader distance in terms of five dimensions: physical, psychological, cultural, structural and functional; and two degrees: proximity and detachment. As already discussed in this chapter, the five dimensions illuminate five different types of follower-leader relationships and how relationships are multifaceted and constructed, and two degrees of distance reveal the tense state of follower-leader relationships. I do not offer a detailed explanation here, instead I focus on what these insights can contribute to the followership literature.

Expanding on these points, the first contribution of this study is to move beyond the relatively static, fixed and objective conceptualization of follower-leader relationships, towards a more social, dynamic and situated conceptualization, which would be a valuable way to appreciate followership as a rather complex phenomenon. My study highlights that the dynamics of follower-leader relationships are at the heart of studying the followership phenomenon, although we know surprisingly little about how relationships are shaped in specific contexts. So far, the contemporary followership literature has progressed from traditional follower traits and characteristics (Junker & Dick, 2014; Sy, 2010) to draw upon follower roles and interpersonal aspects (Carsten et al., 2010; Cunba et al; Kellerman, 2008; Shamir, 2007). However, the literature has been criticized as taking hierarchical positions and structures for granted, reproducing a binary oppositional relationship where followers are trapped within formal asymmetries and inequalities (Collinson, 2006; Tourish, 2014; Ford & Harding, 2015). In contrast, I have provided an expanded viewpoint of this. Rich and clear evidence has illustrated that follower-leader relationships are much more diverse, dynamic and shifting than those recognized in the literature. A superior-subordinate relationship is one type of follower-leader relationship, and there are data demonstrating that a certain degree of formal hierarchy between assistants and managers has an influence on the development of follower-leader relationships. But my study, based on more evidence, argues that follower-leader relationship is an

inter-relational and situated construct, relying on followers' daily interrelations with different leaders in two different contexts. In other words, my study shows the need to conduct a rich empirical investigation of followers' interrelations with leaders, which is an important vehicle for identifying the dynamics of follower-leader relationships. 'How' followers interrelate with different leaders in a physical context and a non-physical context becomes a vital question to help define their relationships in a more nuanced way. This resonates with the viewpoint on a critical approach to studying followership, viewing followership dynamics as 'often reproduced, frequently rationalized, sometimes resisted and occasionally transformed' (Collinson, 2011, p. 182). An exploration of the multiple, dynamic and tense aspects of follower-leader relationships are critical to broadening our understanding of followership dynamics and followership as a complex phenomenon.

An analysis of peer relations goes beyond the binary opposing aspects of follower-leader relationships. This study argues that peer interrelations and relations are influential in shaping follower-leader relationships. While this has been mentioned in the literature (e.g. Cunha et al., 2013; Howell & Mendz, 2008), there is still a lack of solid evidence to elaborate how this occurs. On examining my data, I recognize that followers' inter-relational experiences with peers did not just influence them to shape their relations with peers, but also significantly affected their own understandings and actions in developing relations with different leaders in two contexts. This resembles followership scholars taking diverse actors into account except leaders, whose interrelations with followers are relevant and important in shaping follower-leader relationships. In so doing, a new perspective on dynamics of follower-leader relationship can be developed and extended to a significant extent.

Moreover, this study proposes the notion of follower-leader distance as a valuable lens to conceptualize and view follower-leader relationships and go beyond the existing narrow viewpoints in the literature. I recognize that the followership research has made some attempts to shift the gaze from individualistic and internal aspects of followership towards social and inter-relational aspects. Unfortunately, there is still a lack of innovative and helpful concepts to improve our thinking on follower-leader relationships. One way to address this problem is to explore how follower-leader distance is shaped and reshaped in specific contexts, which differs from existing studies relying on capturing independent variables of followership. Follower-leader distance helps to define the multifaceted, dynamic and tense aspects of follower-leader relationships, and it goes beyond relatively stable and objective forms of relationships. While I have seen increasing recognition in the leadership literature of the implications of leadership distance to expand our understanding of leadership relationships (Antonakis & Atwater, 2002; Bligh & Riggio, 2013; Shamir, 2013), this study highlights investigating the importance of shifting the attention somewhat from leadership distance to followership distance (Collinson, 2006). Rich evidence offers important implications for developing an expanded view of follower-leader distance based on its development, so as to establish a basis for articulating new insights into the complex nature of followership.

To answer my second question- *How do physical and non-physical contexts influence shaping follower-leader relationships?* –My study with its rich evidence suggests that physical contexts offered followers distinct opportunities and challenges to construct diverse relationships with different leaders and peers, and followers were active in understanding, evaluating and managing these emerging contextual elements. Five dimensions theorize five different contextual resources that followers need to cope with, and two degrees of follower-leader distance stress the interdependent nature of physical and non-physical contexts.

Accordingly, the second theoretical contribution of this study is to go beyond the narrow viewpoint on the fixed and objective nature of physical and non-physical contexts and inform a more nuanced perspective on contexts where followership occurs. First, my study helps to make a distinction between a context where followership occurs and a context where leadership occurs, which are often conflated in the followership literature. Although it is generally agreed that followership can be better understood only in the context in which it arises (e.g. Carsten et al., 2010), prior work on conceptualization of the followership context follows a similar trajectory to traditional leadership research that merely capture a leadership context in terms of a list of variables of how leaders think and act. This remains the case in the followership literature, as followers and leaders are still assumed only to be locating in hierarchical relationships. To make a clear distinction from traditional viewpoints of leadership context, my study develops a new mind-set for understanding physical and non-physical contexts: they are viewed as more of an inter-relational construct where followers construct relationships with leaders and peers; these relationships help to shape the meanings of two contexts, which in turn become contextual opportunities and challenges followers need to address. As such, a followership context is ‘unique’ and these features cannot be simply replicated by traditional leadership research (Uhl-Bien, 2014). A followership context, whether physical or non-physical, can be better understood as an issue equal in importance to a leadership context, rather than a sub-issue contributing to the development of leadership effectiveness models.

Furthermore, my study has extended the analysis to explore and establish an important link between two specific contexts where followership occurs, which is under-developed in the literature. Although my focus on the followership context here has been on its constructed and multifaceted features and its implications for followership research, there is still a need to reflect on how physical and non-physical contexts mutually influence each other, as it is relevant in developing an enhanced understanding of followership contexts and followership. The findings provide clear evidence that physical and non-physical contexts are inextricably linked, because followers’ interrelations with different actors in the two different contexts are influential on the dynamic interplay between the contexts. The value of the evidence does not just broaden our interpretations of how followership contexts are at play, it also moves beyond existing either/or thinking towards a both-and or more integrated perspective of contexts where followership occurs. In so doing, followership scholars are invited to further develop and expand a less static and objective perspective on

the dynamics of followership and open up points of tension, paradox and contradictions inherent to the followership phenomenon.

7.5 Research Direction

Based on the theoretical contributions of the study, it provides potential for further research on followership. First, the time is ripe for more empirical investigations of how followership occurs (Bligh, 2011). What the majority of existing studies share is employing a positivist approach to measure and identify the variables of followership, but they are unable to appreciate how followers interrelate with different leaders and other actors to build up relationships. Followership researchers could continue to employ more diverse approaches such as an interpretive approach to expand our understanding of the complex nature of followership. Regarding the appropriate theoretical and conceptual foundations for this field, researchers can further explore various and unpredictable dimensions and degrees of follower-leader distance. This has already been highlighted as a valuable lens to make sense of followership as a complex phenomenon, and it is also reflected in the recent developments of leadership studies that view leadership distance as a fundamental type of leadership relation (Bligh & Riggio, 2013).

Second, there is a call for more investigations on other types of contexts, including different sectors, socio-economic and cultural ones, through which to obtain richer understandings and behaviours of followership. The notion of context is vast and my study focuses on a relatively small aspect, i.e. physical and non-physical. In the wake of the COVID-19 pandemic, it is a challenge for organizations to switch to and reshape remote working over an unpredictable and long term. There are many new opportunities and challenges for followers and leaders to generate diverse experiences of different situated contexts. Some teams may work effectively and build productive relationships between leaders and followers, while other teams may encounter problems of communication, interaction and participation. Followership researchers can pay close attention to these unpredictable contextual elements and rethink how and why contexts are critical to follower-leader relationships in such circumstances.

My short-term research plan is to develop journal articles based on my key findings and theoretical contribution articulated in this thesis. In the long-term, I would like to expand the research area in terms of two aspects.

□ **Gender and Followership**

I aspire to undertake further research on the relationship between gender and followership. While there are important empirical studies related to gender, women and leadership in the workplace (e.g. Elliott & Stead, 2013, 2018), there is limited work that explicitly addresses how women's experiences of being followers contribute to advance our understanding of follower-leader relationships. In this empirical site, a large percentage of the participants are female followers and studies mention women's work experiences when collaborating with remote male leaders. A considerable level of pressure comes from balancing their work and personal lives, securing their positions, and seeking promotion to senior levels. With a primary interest in non-physical and other emerging contexts where technology, media and communication tools are increasingly employed, I believe that important issues around gender, women and followership may emerge from the data, which can enhance our understanding of followership as a complex phenomenon.

□ **Distance, space and followership**

Taking this study on follower-leader distance forward, I expect to bring distance and space together to explore how followers and leaders construct and reconstruct their relationships in emerging contexts. Space and place have been central concepts in understanding organizational practices and subjectivities (Cnossen & Bencherki, 2018; Halford & Leonard, 2005; Weinfurtner & Seidl, 2018). There is a growing number of studies that explicates leadership as being produced and reproduced in a process between people and space (e.g. Ropo et al., 2013; Salovaara, 2018). Especially, distance, space and place are inseparable from each other, as space can be understood as 'patterns of distance' (Taylor & Spicer, 2007, p. 341) or 'distance along dimensions' (Abler et al., 1971, p. 73). Not only does distance define leadership and followership relations and dynamics, but space plays a role, too. Especially in a non-physical context, while followers and leaders are geographically distant, they can be perceived as dwelling relationally within a space. My future research will seek a clear and in-depth understanding of the nature of follower-leader relationships in terms of space and distance.

7.6 Limitations

No research process can be perfect (Alvesson & Skoldberg, 2009). In assessing my whole research process, I clearly recognize three issues that can be improved in a future research design.

The first issue is that my interview skills need to improve. While I spent a considerable amount of time accessing and interviewing participants and provided a full-grained presentation of the process, I was still far from developing and sustaining relationships with them in a more productive way. In my empirical site of the financial analysis industry, it is a fast-paced and high-pressure work environment; my participants were constantly facing long working hours, huge responsibilities for clients, and external pressures to deliver compelling results. The researcher recognized the challenges of making the transition from working as a doctoral student to conducting interviews at such a site. The participants presented not just new knowledge and experiences related to their work the researcher had never heard about, but also irregular working hours, different locations and time zones the researcher needed to deal with. I clearly recognized implicit power relations arising from those remote analysts who did not try to comply with the expectation of providing a rich and detailed account of their experiences. They emphasized their busy schedules and talked about their inter-relational experiences to a limited extent. This is very challenging for my future research in this empirical site, but it can be overcome if more attention is paid to conducting electronic interviews with remote individuals. In this scenario, I need to build comfortable and trusting relationships before interviews, which will help interviewees better understand what the interview aims are and how they are expected to participate. I must also pay specific attention to different features of communication tools, such as Skype, Teams, What's app and Wechat, through which to use a wide range of strategies to deliver information clearly and establish connective and engaged interview relationships.

The second issue is the possibility of conducting comparative or multiple case studies in future projects. A single interpretive case study is valuable to generate in-depth understandings and experiences of participants. Despite this, with sufficient time, I am willing to engage in a more complicated project that requires extensive data for followership research. It would be very interesting to examine one case where participants are located in both physical and non-physical contexts, and another case where participants are situated in a physical context. This is likely to provide fresh insights into the potential impact of a non-physical context on followership dynamics. Of course, there is no doubt that any methodological decisions should be consistent with the philosophical and theoretical positions of projects. Besides, as mentioned in the previous section, physical and non-physical dimensions are one way of looking at contexts where followership occurs. I wish to become more aware of diverse types of contexts and the impact of those contexts on shaping follower-leader interrelations. Even if I still focus on physical and non-physical contexts, more opportunities are there to explore multiple aspects of these two specific contexts, arising from more solid empirical investigation.

7.7 Final Thoughts

Overall, this has been an exciting opportunity for me to look deeply into the complexities of followership. During the journey, I was constantly aware of difficulties and uncertainties in managing each step of this research process. It took a long period of time to tease out the different philosophical positions underlying the main followership studies, and then articulate my own. It took a much longer time to enter the empirical site and engage in data generation and analysis, which required openness to and respect for participants' experiences and opinions. What surprised me was obtaining data far more valuable and interesting than I had predicted. This empirical investigation has taught me to show more interest in any thoughts and ideas that participants raise with me, rather than relying on my own pre-understanding. Therefore, I am convinced that the understanding, experience and insights I have gained from this research journey are not an end-point, but instead pave the way for studying followership and leadership further in new and emerging contexts.

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Appendix A: Participants' Quotes

Wei	<p><i>“we are collaborators. He teaches me a lot and I learn much from him”</i></p> <p><i>“he (the analyst) writes emails very briefly, just use one sentence. His emails are like program orders or instructions, for instance, ‘this looks good’, ‘this haven’t been told’, ‘very, very impersonal’”. “we mutually support with each other. Our aim is to make efforts to complete the tasks as much as possible”</i></p>	WEI 1 WEI 2
Lin	<p><i>“I trust him (the analyst). It comes from, when he discussed some industries, he was very competent, and explains very clearly. I felt he has lots of work experience. Then I want to learn from him”.</i></p> <p><i>“I could see facial expression (eye contact and smiles), then I could judge whether he (the analyst) agreed with my opinion or not; I could also see nod or one shakes head. But now he waits me to explicitly say ‘yes, I see’ ”</i></p>	LIN 1 LIN 2
Hai	<p><i>“his (his analyst) research methods and writing reports, compared with other analysts, is perfect. He never made mistakes and mastered every detail very accurately. In the beginning, I really expect him to guide me”</i></p> <p><i>“Two reasons causing the difference in competitive abilities. First, language. Someone is able to speak Japanese or other not-universal languages. Second, special background. Someone studied medicine before so he knows better than others on this field”.</i></p> <p><i>“he is very special, because his intelligence is above everyone else. I feel it is highly unachievable, there is a gap between he and me, impossible to walk across. So I don’t want to ask him many questions”.</i></p> <p><i>“Manager are university administrative tutors who provide ‘life-related’ issues, not ‘technical-related’ ones”.</i></p>	HAI 1 HAI 2 HAI 3 HAI 4

Kant	<p><i>“The analyst was very friendly, nice, pointing out mistakes kindly”</i></p> <p><i>“Our conversation and discussions are very comfortable”; “they (the analysts from Hong Kong) face high pace of life and high pressure there, so they focus more on work. This caused them sometimes to lose temper”.</i></p> <p><i>“It helps to ensure that we leave all documents in the offices, it’s fine” “According to regulation, we cannot bring bags into offices. But only if you hide it under the camera, you could take it in. Of course, we cannot take papers out”</i></p> <p><i>“My analyst was still working there, how can I leave earlier?”</i></p>	<p>KANT 1</p> <p>KANT2</p> <p>KANT 3</p> <p>KANT 4</p>
Han	<p><i>“Koreans treats human as tools, not respect them. They don’t explain why, but just expect you to be fully obedient”</i></p> <p><i>“We have a particular feeling when we are face-to-face. This is a very nuanced feeling, which is only experienced in face-to-face situations. Even if a person was competent in English, he still employs terms to actually express his meanings. But they can use facial expressions and body language to reduce misunderstandings and give direct feelings”</i></p> <p><i>“Its efficiency on using emails and telephone is bad”</i></p> <p><i>“In this period, he would not come to talk with me”</i></p> <p><i>“we often comfort with each other, especially when one was strongly criticized by an analyst”; “my colleagues are more influential, because they can tell me how to operate this or that”</i></p>	<p>HAN 1</p> <p>HAN 2</p> <p>HAN 3</p> <p>HAN 4</p> <p>HAN 5</p>
Jing	<p><i>“I felt, trust is from affinity and caring, He is willing to explain why, sometimes, I would ask him questions and he is willing to answer. He also welcomes me to challenge opinions anytime I feel not reasonable”.</i></p> <p><i>“Actually, face-to-face is very important for our work to be established. Making a call and meeting the person physically, is different, since many things about the person should be felt”.</i></p>	<p>JING 1</p> <p>JING 2</p>
Ken	<p><i>“Hierarchy is very simple, very friendly. We helped each other”</i></p> <p><i>“They (the assistants) need time to have a rest”</i></p>	<p>KEN 1</p> <p>KEN 2</p>

John (analyst)	<i>“of course, it is important to encourage my assistants to challenge me.”</i>	JOHN 1
Rui	<i>“The central tasks need independent judgments and arguments on the data”</i> <i>“when I did not pick up calls timely, he often turned to send me an email with an exclamatory mark. This means ‘urgent’”</i> <i>“sending an email within seconds is reasonable” “he always asked me to find something that can’t be found at all. I felt every second was counting</i>	RUI 1 RUI 2 RUI 3
Mark (Qing’s analyst)	<i>“I believed my assistant could complete the task and often finished perfectly”</i> <i>“Protecting confidential information is crucial”</i>	MARK 1 MARK 2
Xiang	<i>“For every report he (the analyst) produced, there is few mistakes. He also required me not to make mistakes. This is rather stressful, especially when I was required to complete an advanced task. Initially I felt very happy, wow, because this s huge responsibility. But later I found very depressed”</i>	XING 1
	<i>“I was like a person who can’t speak English but was required to read a book on IELTS reading, overwhelming”</i>	XIANG 2
Tom (Xiang’s analyst)	<i>“I was like a person who can’t speak English but was required to read a book on IELTS reading, overwhelming”</i> <i>“Dominating final arguments is normal for every analyst”</i> <i>“Its efficiency is bad”</i> <i>“If I found some mistakes in their reports, I would call them by mobile phone or use Wechat to ask reasons”</i>	TOM 1 TOM 2 TOM 3 TOM 4
Pan	<i>“we can’t have deeply communication. I don’t know why I did this task, because he didn’t explain why. Sometimes he just gets a glimpse of my ideas, but actually didn’t use it into his own report. What purposes of asking me to do this and that!”</i>	PAN 1
KIN	<i>“my analyst did not want to waste every minute on my question”.</i> <i>“what I know is mostly learnt by myself. My analyst often told me to develop self-learning ability, when I asked a question”</i> <i>“a sense of belonging is important for me. Because I will feel lonely if I do not have colleagues around me”.</i>	KIN 1 KIN 2 KIN 3 KIN 4

	<i>"The way we get along with each other is very similar to mates in universities. I can't feel any difference from that relations". "I am an employee, it's true. But all the employees are flat, although above us there are managers. We don't have superior-subordinate differences" "We have no interest conflicts, no competitive relationships and no hierarchical sense"; "we just needed to perform tasks individually and one's work progress did not interrupt the other"</i>	
Zheng (Kin's analyst)	<i>"I don't have enough time doing so. I am so busy every day." "I do not necessarily answer their questions, because learning by themselves is basic" "I do not know what my assistants are doing. I want to know more about their information"</i>	ZHENG 1 ZHENG 2 ZHENG 3
Tu	<i>"(knowledge is) very huge, I have to learn a lot, lots of things, it is really impossible to form a coherent knowledge system" "the manager helped me to resolve technical problems and I would like to tell him unhappy stories with the analyst" (TU 2) "star(ing) at someone, remind(ing) their work progress, and explain(ing) operating issues on how to communicate with analysts via emails"</i>	TU 1 TU 2 TU 3
Lan	<i>"I could propose my points, but final argument is constructed by my analyst. He doesn't need to persuade me".</i>	LAN 1
Fei	<i>"I could propose my points, but final argument is constructed by my analyst. He doesn't need to persuade me".</i>	FEI 1
Xue	<i>"email is more comfortable, because it has records. 70% misunderstandings were from my analyst's fault, for instance, he didn't read clearly or he didn't understand what the client wanted. At these moments I found out previous emails to make him not worried" "our managers' responsibilities are providing supports to the assistants" "managerial surveillance is just 'normal working practices' "We are young person, and the age difference is smaller than five years. We communicate with each other very conveniently. Also, we had studying aboard experience, so we have lots of common hobbies." "you don't need to pretend to be extraordinary because of studying abroad experience. This doesn't exist."</i>	XUE 1 XUE 2 XUE 3 XUE 4
Mike (manager)	<i>"I don't need to worry too much on their (assistants') performance. They are independent" "take any documents relevant to company information out of offices"; "they cannot take pictures from the (computer) screens"</i>	MIKE 1 MIKE 2 MIKE 3

	<p><i>"We needed to monitor them in efficient way"s</i></p> <p><i>"it is very important to comfort them"</i></p>	MIKE 4
Wen	<p><i>"when I sat next to him (the analyst), he could directly show me how to operate the system. I could understand his personality, when we had lunch together. We shared perspectives together"</i></p> <p><i>"the managers sit with us in the offices. Their responsibility was to monitor employees, but not in a coercive way"</i></p> <p><i>'university administrative tutors': the tutors just provided 'life-related' issues, not 'technical-related' ones.</i></p> <p><i>"every second was counting</i></p> <p><i>"It is not all the time that the analysts would answer your calls. We have to wait for them when they are free". "have to sit in the offices a whole day, because I'm afraid of failing to answer calls from the analysts".</i></p> <p><i>"I can figure out when he would have lunch, about eighty percent of correction"</i></p> <p><i>"sometimes, he suddenly called me, and I had to put down my lunchbox".</i></p> <p><i>"we helped each other to pick up calls from the analysts"; "we often helped each other to make excuses to their analysts, for instance, he (the assistant) was out to toilet for a while, in fact my friends were out to purchase snacks; "if my analyst ask where I am, you tell him I am in the toilet and will come back soon"</i></p>	<p>WEN 1</p> <p>WEN 2</p> <p>WEN 3</p> <p>WEN 4</p> <p>WEN 5</p> <p>WEN 6</p> <p>WEN 7</p>
Mei	<p><i>"face-to-face or eating together can bring more personal topics, not just limited at tasks" (MEI 1)</i></p> <p><i>"an idea that was produced and issued at the highest speed was crucial"</i></p> <p><i>"I picked up calls very quickly. Very rarely I delay the calls. Because this work itself requires high efficiency".</i></p> <p><i>"making reports is closely associated with the market information. If a report was delayed, it cannot provide useful information on the changing market".</i></p> <p><i>"I cannot work without office culture, without people who can drink and eat with you"; "some colleagues can help me to resolve technical problems and we often discussed problems together in the offices".</i></p>	<p>MEI 1</p> <p>MEI 2</p> <p>MEI 3</p> <p>MEI 4</p> <p>MEI 5</p>
Zhou	<i>"managerial surveillance is normal working practices"</i>	ZHOU 1

	<p><i>“sending emails cannot receive timely responses. Its efficiency is bad”.</i></p> <p><i>“I have more space and I can arrange my time freely, as no one was constantly seeing you”.</i></p> <p><i>“Real friendship is different from workplace friendship. I need two kinds of friendship”; “real friends and workplace friends have different social functions. Real friends do not often talk about work, but workplace friends often discuss work-related things”</i></p>	<p>ZHOU 2</p> <p>ZHOU 3</p> <p>ZHOU 4</p>
Xin	<p><i>“the managers sit with us in the offices. Their responsibility was to monitor employees, but not in a coercive way”</i></p> <p><i>“I did not feel the manager was managing me.”</i></p> <p><i>“I often work in weekends, especially on Saturday. My analyst always worked for a whole week and did not take any rest”</i></p>	<p>XIN 1</p> <p>XIN 2</p> <p>XIN 3</p>
James (manager)	<p><i>“we aimed to help you (the assistants) communicate with your analysts, provide training in the beginning of your work”</i></p>	JAMES 1
Lao	<p><i>“It really depends on which one is more urgent. I need to classify emails in terms of the degree of urgency” “The Indian analyst sent you something, but he forgot after a week; an analyst from Hong Kong sent you something in the morning and he urged you to reply in the afternoon” this assistant chose to “cope with the one who urged me to reply. The Indian analyst can wait”</i></p> <p><i>“we had very good collaborations and he performed excellently” (LAO 2)</i></p> <p><i>“did not provide a fixed group of people working with me, and who comes first can occupy a seat”; “I really need a community, a social group, because human are social animals”; “I can’t survive being by myself. Just like raining heavily in this city and the traffic jam is seriously. But you can’t feel belonging. So I think to cram in the buses is also a good experience”</i></p>	<p>LAO 1</p> <p>LAO 2</p> <p>LAO 3</p>
Jack	<p><i>“telephone calls are very pushing, but emails are relaxing”</i></p> <p><i>“I often did my own things, drawing pictures, reading books, during telephone meetings. The meetings were boring”; “if face-to-face, I can’t do that; but in certain distance, I can do whatever I want” he “pretended to listen to the calls, and at the same time, say ‘en’, ‘yes’ and ‘ok’ to give responses”.</i></p>	<p>JACK 1</p> <p>JACK 2</p>

Qing	<p><i>“I feel, everyone (the analysts) has a strong background. In terms of education background, they are better than me. So, when I communicate with them, I often want to be modest”</i></p> <p><i>“I always ready to learn knowledge from him and happy to accept criticisms”</i></p> <p><i>“I hope to take up more tasks, and they also expect this. My team moves towards this goal and I can take up more central, financial modeling tasks”</i></p> <p><i>“I shifted from telephone to emails’</i></p> <p><i>“his telephone calls may push me to provide a direct feedback or perspective. This makes me a little bit nervous” “write an email first to ask whether my analyst has the time to discuss with me”. This is helpful because “I can have time to prepare questions”</i></p>	<p>QING 1</p> <p>QING 2</p> <p>QING 3</p> <p>QING 4</p> <p>QING 5</p>
Fang	<p><i>“when I did not pick up calls timely, he often turned to send me an email with a exclamatory mark. This means ‘urgent’</i> <i>“</i> <i>The managers are supporters, not collaborators in everyday work”</i></p>	<p>FANG 1</p> <p>FANG 2</p>
Ying	<p><i>“Japanese analyst is more comfortable feelings, he was always friendly, gentle and polite”. “I like Japanese analysts”</i></p> <p><i>“His attitude was often very bad, he was very demanding and urgent. I had to bear and keep silence at most of time”</i></p> <p><i>his often pointed out her mistakes in a straightforward way with a serious tone” and a high volume, so I often keep in silence</i></p> <p><i>“the managers were not important actors in our relationships”</i></p> <p><i>“We often talk about hobbies, movies and other personal topics during work”</i></p> <p><i>“We can’t take photos of screens. Any movements such as lifting arms are risky”</i></p> <p><i>“We stood out of offices, chatted with each other, purchased coffee and snacks downstairs”</i></p> <p><i>“I heard from others that the number of cameras will increase to each corner of an office next year. They (analysts) could see us from each angle. Oh my God!”</i></p> <p><i>“I’m a bumpkin among the colleagues, because they studied abroad from junior school...he was extraordinary among our</i></p>	<p>YING 1</p> <p>YING 2</p> <p>YING 3</p> <p>YING 4</p> <p>YING 5</p> <p>YING 6</p> <p>YING 7</p> <p>YING 8</p> <p>YING 8</p>

	<i>assistants, because he was graduated from Tsinghua University</i>	
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Appendix B: Letter of Invitation

Letter of Invitation

Dear (Name),

I am a third year Ph.D student in the department of Leadership and Management, Management School, Lancaster University. I am very interested in the interactions between employees and other actors in an organization and I am contacting you to invite you to take part in a research study titled 'the emergence of a non-physical context: exploring an interactive understanding of followership'.

The study aims to understand how the organizational members understand their interactive experiences with others in different locations. I hope to use the data from this research to find ways to help organizational members understand the ways they interact with each other.

I am now writing to invite you that the next stage of the study (interviews) has started and I would very much like to arrange one interview with you. The interview is a one-to-one interview, which would take place separately in an office or a coffee shop near your work place (the place and time depend on you). The interview would last around one hour and would involve answering questions about your work experiences and feelings.

I will present the informed consent form to allow you to understand the interview in more detail, together with my personal contact information.

I understand that some individuals may feel anxious or uncomfortable about taking part in a research project. I, as a PhD student, have trained to work with participants and encourage them to be open and relax during the process. The interview would not ask any sensitive questions. You can stop at any time if you feel uncomfortable.

I do hope you will continue to be involved with Lancaster University and I really appreciate all of your help in making the study successful so far.

Thank you.

Yours sincerely,

Diansha Wang

Department of Leadership and Management
Lancaster University
LA2 0PJ
07752594963

Appendix C: Advertising Letter

Dear XXX,

Sorry to interrupt you.



I am writing to ask if you have an interest in participating into a research project titled 'the emergence of a non-physical context: exploring an interactive understanding of followership'.

I am a third year Ph.D student in the department of Leadership and Management, Management School, Lancaster University. I am very interested in the interactions between employees and other actors who are located at different locations. Your company is very suitable for my study based on my information search on the Internet. The financial analysts, the financial assistants and the managers are considered as the appropriate participants.

So, I am contacting you to invite you and your organizational members to take part in face-to-face interviews through which you can freely talk about your interactive experience in the organization. The interview is a one-to-one interview, which would take place separately in an office or a coffee shop near your work place (the choice of place and time depend on you). The interview would last around one hour and would involve answering questions about your work experiences and feelings. Due to my study focus is on working experience, I will not force you to answer sensitive questions on the financial service industry. I, as a PhD student, have trained to work with participants and encourage them to be open and relax during the process. Generally, I hope to use the data from this research to find ways to help organizational members understand the ways they interact with each other.

I attached the informed consent form and participant information sheet to allow you to understand the interview in more detail, together with my personal contact information. If you have an interest in engaging in the research, it would be nice if you could forward this email and attached materials to your organizational members. I do hope you will continue to be involved with Lancaster University and I really appreciate all of your help in making the study successful so far.

Looking forward to you reply!

Best regards,

Diansha Wang

Appendix D: Consent Form



CONSENT FORM

Project Title: The Emergence of a Non-physical Context: Exploring an Interactive Understanding of Followership

Name of Researchers: Diansha Wang

Email: d.wang9@lancs.ac.uk

Please tick each box

1. I confirm that I have read and understand the information sheet for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily	<input type="checkbox"/>
2. I understand that my participation is voluntary and that I am free to withdraw at any time during my participation in this study and within 2 weeks after I took part in the study, without giving any reason. If I withdraw within 2 weeks of taking part in the study my data will be removed. If I am involved in focus groups and then withdraw my data will remain part of the study.	<input type="checkbox"/>
3. I understand that any information given by me may be used in future reports, academic articles, publications or presentations by the researcher/s, but my personal information will not be included and I will not be identifiable.	<input type="checkbox"/>
4. I understand that my name/my organisation's name will not appear in any reports, articles or presentation without my consent.	<input type="checkbox"/>
5. I understand that any interviews will be audio-recorded and transcribed and that data will be protected on encrypted devices and kept secure.	<input type="checkbox"/>
6. I understand that data will be kept according to University guidelines for a minimum of 10 years after the end of the study.	<input type="checkbox"/>
7. I agree to take part in the above study.	<input type="checkbox"/>

Name of Participant

Date

Signature

I confirm that the participant was given an opportunity to ask questions about the study, and all the questions asked by the participant have been answered correctly and to the best of my ability. I confirm that the individual has not been coerced into giving consent, and the consent has been given freely and voluntarily.

Signature of Researcher /person taking the consent _____ **Date** _____ Day/month/year

One copy of this form will be given to the participant and the original kept in the files of the researcher at Lancaster University



Appendix E: Personal Information Statement

The emergence of a non-physical context: exploring an interactive understanding of followership

I am a third-year PhD student from Lancaster University and going to explore how followers and leaders interact with each other in different locations. You are being asked to take part in a research study. Before you decide to participate in this study, it is important that you understand why the research is being done and what it will involve. Please read the following information carefully. Please ask the researcher if there is anything that is not clear or if you need more information.

PRINCIPAL INVESTIGATOR

PhD student: Diansha Wang
Tel: 07752594963
Email: d.wang9@lancs.ac.uk
Dept Leadership and Management
Lancaster University
LA1 XXX

Prof. Claire Leitch
Head of department
Email: c.leitch@lancs.ac.uk
Dept Leadership and Mangement
Lancaster University
LA1 XXX

What is the study about?

The purpose of this study is to understand the interactions between followers and leaders in their specific contexts. Especially, the study is designed to examine the situation where they cannot interact with each other face-to-face. I am conducting this study to learn more about this question, since it has not been studied adequately in the past.

Why have I been invited?

You are a member of an organization that uses the tools such as emails and telephone to communicate with others in different locations. I want to find out what your interactive experiences are in such a context. Thus I am seeking information from people who are current organizational members who are using such tools.

What will I be asked to do if I take part?

You are invited to experience a face-to-face interview that asks you basic questions about your work lives. The interview will not be over one hour and will be conducted by the researcher herself. You will be interviewed separately in a room in the organizational office. The interview will be audio-taped and later transcribed for the purpose of data analysis.

Do I have to take part?

No. Your participation is voluntary. It is up to you to decide whether or not to take part in this study. If you decide to take part in this study, you will be asked to sign a consent form. After you sign the consent form, you are still free to withdraw at any time and without giving a reason. Withdrawing from this study will

not affect the relationship you have, if any, with the researcher. If you withdraw from the study before data collection is completed, your data will be destroyed.

What are the possible disadvantages and risks of taking part?

There are no significant risks of data disclosure involved in the interview participation. Potential risks may include possible emotional feelings when the researcher asks questions during the interview. But you are free to not answer, to pause, or to withdraw.

What are the possible benefits?

There will be no direct benefit such as economic benefit to you for the participation in this study. However, we hope that the participation can be an opportunity for you to discuss feelings, perceptions, and concerns related to the experiences of interactions with others in work environments. This can contribute to understanding of decision-making during your work.

Will my data be identifiable?

After the interview, only I, the researcher conducting this study will have access to the ideas you share with me. The only other person who will have access to what you contributed is a professional transcriber who will listen to the recordings and produce a written record of what you have said. The transcriber will sign a confidentiality agreement. I will keep all personal information about you (e.g. your name and other information about you that can identify you) confidential, that is I will not share it with others. I will remove any personal information from the written record of your contribution.

How will we use the information you have shared with us and what will happen to the results of the research study?

I will use the information you have shared with me only in the following ways:
I will use it for research purposes only. The information will be used in my PhD thesis and journal articles. I may also present the results of my study at academic conferences.

When writing up the findings from this study, I would like to reproduce some of the views and ideas you shared with me. I will only use anonymised quotes (e.g. from my interview with you), so that although I will use your exact words, you cannot be identified in our publications.

If anything you tell me in the interview suggests that you or somebody else might be at risk of harm, I will be obliged to share this information with *my supervisors*. If possible I will inform you of this breach of confidentiality.

How will my data be stored?

The information gathered during this study will be stored in encrypted files (that is no-one than me, the researcher will be able to access them) and on password-protected computers. I will store hard copies of any data securely in locked cabinets in my office. I will keep data that can identify you separately from non-personal information (e.g. your views on a specific topic). Also, in accordance with University guidelines, I will keep the data securely for a minimum of ten years.

How will we use the information you have shared with us and what will happen to the results of the research study?

When writing up the findings from this study, I would like to reproduce some of the views and ideas you shared with me. When doing so, I will only use anonymised quotes (e.g. from our interview with you), so that although I will use your exact words, you cannot be identified in our publications.

If anything you tell me in the interview (*or other data collection method*) suggests that you or somebody else might be at risk of harm, I will be obliged to share this information with *add who you would turn to in the first instance, probably your supervisor and/or colleagues*. If possible I will inform you of this breach of confidentiality.

What if I change my mind?

You are allowed to withdraw your data from the project during the interview and data analysis processes. But it is important to note that to remove the data should be as early as possible. If you withdraw within two weeks of commencement of the study, any interview data will be removed. After the point the data will remain as part of the study. Thus, it is reasonable to negotiate with the researchers and explain your main concerns of the data. Otherwise, it can significantly influence the whole research contribution.

Who has reviewed the project?

This study has been reviewed and approved by the Faculty of Arts and Social Sciences and Lancaster Management School's Research Ethics Committee.

What if I have a question or concern?

If you have any concerns or complaints about this project you can contact my supervisor, whose contact details are on

VOLUNTARY PARTICIPATION

Your participation in this study is voluntary. It is up to you to decide whether or not to take part in this study. If you decide to take part in this study, you will be asked to sign a consent form. After you sign the consent form, you are still free to withdraw at any time and without giving a reason. Withdrawing from this study will not affect the relationship you have, if any, with the researcher. If you withdraw from the study before data collection is completed, your data will be returned to you or destroyed.

Thank you for considering your participation in this project.