

Trustworthiness: Enabling Global Collaboration

An Ethnographic Study of Trust, Distance, Control, Culture and Boundary Spanning within Offshore Outsourcing of IT Services

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TRUSTWORTHINESS: ENABLING GLOBAL COLLABORATION

PhD Series 03-2015

Thomas Tøth

TRUSTWORTHINESS: ENABLING GLOBAL COLLABORATION

AN ETHNOGRAPHIC STUDY OF TRUST, DISTANCE, CONTROL,
CULTURE AND BOUNDARY SPANNING WITHIN OFFSHORE
OUTSOURCING OF IT SERVICES

PhD School in Organisation and Management Studies

PhD Series 03.2015

CBS  COPENHAGEN BUSINESS SCHOOL
HANDELSHØJSKOLEN

TRUSTWORTHINESS: ENABLING GLOBAL COLLABORATION

*- An Ethnographic Study of Trust, Distance, Control, Culture and
Boundary Spanning within Offshore Outsourcing of IT Services*

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Doctoral School of Organisation and Management Studies

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PREFACE & ACKNOWLEDGEMENTS

I seemed to spend ninety percent of my time putting out fires and ten percent thinking about why offshore outsourcing collaboration is inherently difficult; and I wanted to turn that bucket around and spend ninety percent of my time thinking about the complexities of offshore outsourcing and, not least, how to improve such collaboration.

That was the main reason for taking upon me the challenge of reacquainting with academia by enrolling as a doctoral student and writing a PhD dissertation. I have given this explanation countless times to people I have met over the latter years. It is the first sentence in my elevator speech.

Roughly three years ago I made a shift from being a practitioner working within IT-industry with a primary focus on managing and developing collaboration between Danish and Indian IT professionals – a journey that had included expatriation to India as a part of the management group of the largest IT offshore outsourcing endeavor that any Danish company has engaged in – to becoming a researcher within the field of global collaboration and teamwork.

When I drafted the application for the PhD-fellow position at Copenhagen Business School (CBS) I knew that I wanted to dig deeper into the role of trust in collaborations characterized by crossing national, organizational, cultural and geographical boundaries. I knew I would like to focus my research efforts on trust, as it had become clear to me that in global collaborations everything seemed to work out fine as long as the actors trusted each other; and when they did not problems seemed to pile up.

At that time I had no idea what trust was – at least not from an academic perspective. Over the last three years I have researched trust and trustworthiness and refined my view on these constructs: and I have also expanded my understanding of the empirical concept of offshore outsourcing, as well as the related theoretical constructs I introduce

in this dissertation, a great deal along the way. The result is this PhD dissertation. It is inherently mine, but it would not have turned out the way it did without the contributions, support and encouragement from number of people. To these people I owe a great deal of gratitude.

Therefore I would like to thank the people involved in the NexGSD (Next Generation Technologies and Processes for Global Software Development) project and my colleagues at CBS. I would also like to thank Dr. Ann-Marie Nienaber from Coventry University and Dr. Peter Ørberg Jensen from CBS for their valuable and constructive feedback at my pre-defense seminar. And I would like to thank the assessment committee – Dr. Mette Zølner from CBS, Dr. Sylvie Chevrier from Paris-Est University, and Dr. Pamela Hinds from Stanford University – for their efforts in assessing this dissertation and for their valuable comments.

I am very grateful to HCL and Berlingske Media for agreeing to let me conduct ethnographic field studies in their organizations. Their openness, which has provided me with a practically unlimited access to conduct observation studies and interviews, is deeply appreciated – and so is the curiosity and interest I have been met with all along.

Furthermore, I thank Dr. Anne-Marie Søderberg for supervising my PhD project. Throughout the last three years you have helped me develop my arguments; provided critical feedback on my writings; engaged with me in numerous fruitful discussions; and supported me all along. Thank you.

I would also like to thank my family and friends for taking an interest in my academic endeavors; and for their love and support. In particular, I would like to thank Susanne: For your love, support, compassion and encouragement throughout this project – and in life in general. It means more to me than words can even begin to describe.

Finally, to my daughter Laura: Without you, none of all this would matter at all. Thank you for sunshine every day.

SUMMARY

This PhD dissertation is an ethnographic field study of the collaboration between Berlingske Media, one of the leading media companies in Denmark, and their Indian IT service provider, HCL – one of the largest IT service providers worldwide. The dissertation studies the day-to-day operational collaboration between actors from the client organization and the vendor organization in order to understand how vendor-side actors, as individuals and as a collective, can be constructed as trustworthy collaborators in the eyes of the client-side actors.

While trust is the theoretical epicenter of this thesis it is, in acknowledgement of the contextual and dynamic nature of trust, subjected to an interdisciplinary analytical framework. Thus, the four analytical chapters in Part II introduce four different factors that influence the client-side actors' perceptions of vendor-side actors' trustworthiness: distance, control, culture and boundary spanning.

The analytical conclusions are summarized in Part III of the dissertation. Based on these analytical conclusions a number of practice-oriented suggestions on how the client-side actors' perceptions of the vendor-side's trustworthiness can be improved are presented and discussed. Furthermore, the theoretical implications are presented and discussed.

RESUMÉ

Denne afhandling er et etnografisk feltstudie af samarbejdet mellem en af de største danske mediehuse, Berlingske Media, og deres indiske IT-leverandør, HCL, som er en af de største leverandører af IT-services i verden. Afhandlingen studerer det daglige, operationelle samarbejde mellem aktører fra henholdsvis kunde- og leverandørorganisationen med henblik på at forstå hvordan aktørerne på leverandørsiden, kollektivt og som individer, konstrueres som troværdige samarbejdspartnere, set fra kundeorganisationens-aktørernes perspektiv.

Tillid er afhandlingens teoretiske omdrejningspunkt, som, i erkendelsen af at tillid er en kontekstafhængig og dynamisk konstruktion, bliver analyseret interdisciplinært. Således introducerer de fire analytiske kapitler i afhandlingens anden del fire forskellige faktorer, der påvirker kundeorganisations-aktørernes opfattelse af leverandørorganisations-aktørernes troværdighed: distance, kontrol, kultur og boundary spanning.

I afhandlingens tredje del opsummeres de analytiske konklusioner fra de fire analytiske kapitler. Baseret på disse analytiske konklusioner præsenterer og diskuterer afhandlingen en række praksisrettede forslag til hvordan kundeorganisations-aktørernes opfattelse af leverandørorganisations-aktørernes troværdighed kan fremmes. Ydermere præsenteres og diskuteres afhandlingens teoretiske implikationer.

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PART I

CHAPTER I: INTRODUCTION

Trust: The Secret Ingredient of Organizational Life

“Without the general trust that people have in each other, society itself would disintegrate, for very few relationships are based entirely upon what is known with certainty about another person, and very few relationships would endure if trust were not as strong as, or stronger than, rational proof or personal observation” (Simmel, 1978: 178)

Trust is much like water: we cannot live without it. Just imagine driving in urban traffic if we cannot trust that when you have a green light cars crossing are faced with a red light. And if the light is indeed red, what if you cannot trust them to keep at standstill until the light turns green? How can we make electronic payments without trusting the underlying payment infrastructure to charge the right amount from our credit card and transfer it to the super market’s account? What about cash payments, if we do not trust the value of money to be relative stable? What about living in a house if we do not trust that the roof will not collapse all of a sudden? Indeed we cannot live relatively normal lives without trusting. We trust every day, all the day. And for the most part we do so unconsciously.

In our everyday life we often take for granted that we can indeed trust someone or something – and usually we are right. That is, “[w]e are no more likely to ask ourselves how trusting we are at a given moment in time than to inquire if gravity is still keeping the planets in orbit. However, when trust is disturbed it claims our attention as urgently as would any irregularity in the gravitational field” (Brothers, 1995: 3). This does, however, not imply that trust is a trivial matter, though the body of literature on management theory tends to treat it as if it was. As Möllering (2006) rightly puts it “the

burgeoning literature on the formation of international joint ventures and strategic alliances in the 1990s regularly included a paragraph or short section, just before the conclusion, stating more or less in passing that – besides all sorts of economic and technical matters that have to be considered carefully – mutual trust has to be build, too” (Möllering, 2006: 3). Trust indeed has a certain taken for grantedness – in our daily life as well as in academic literature. Like most cookbooks would not dwell on “add salt”, management literature does not dwell on trust. “Add salt”, the recipe would say, without specifying how much salt or what kind of salt. It is up to the cook’s personal preference and it is considered highly unproblematic. “Add trust”, says the management literature, with an underlying assumption that trust is as uncomplicated as salt. This is an assumption that I will question in this thesis.

To stay with the culinary metaphors, trust is *masala* – a mixture of grounded spices used in the Indian cuisine. The interesting thing about *masala* is that while most masalas have some spices in common (typically cumin seeds, coriander seeds, cardamom and cloves) there is a wide range of spices that can go into a masala and an infinite number of possibilities to combine quantities. Thus, masala is not one well-defined thing, rather it is a common term for spice mixes and can have radically different tastes. In the Indian cuisine a masala can be a trademark of a cook – professional or domestic. It is that secret ingredient that makes the cook’s dish a signature dish. Much like the masala is the secret ingredient of the Indian cuisine, I argue that trust is a secret ingredient in organizational life. That is, we may use trust un-reflected on a daily basis, because it is unproblematic, like buying a commercial masala product produced in bulk quantities in a supermarket. But when it turns out that the dish does not get the taste we expected; when trust gets problematic, we need to deconstruct. Was it because of too little cumin, too much chili? Was it because of unconscious lack of propensity to trust, because of perceptions of inadequate abilities – because integrity has not been rendered visible or something completely different?

Trust is that secret ingredient to organizational life, which is all so important to work as frictionless, effective and efficient as possible within the organization. Nienaber et al. (2014) have recently published an article that shows how trust is perpetually overlooked in the management literature. This is despite the fact that “virtually every commercial transaction has within itself an element of trust” (Das & Teng, 1998: 494) and as “it is impossible to monitor every detail in most exchanges, firms must always have a minimum level of trust” (ibid.). Trust is indeed a complex construct that deserves attention.

Studying Trust in a Globally Distributed Context

During the latter years many IT organizations, being IT companies or IT divisions in companies from other industries, have begun a journey into becoming global and multi-cultural organizations, with staff split across different locations in different countries. This indeed introduces a new level of complexity generated by technology. While some IT-organizations have established legal entities abroad hiring IT-professionals to work from offshore on development projects and maintenance, others have engaged with partners and thus established offshore outsourcing set-ups. The extent of cooperation between geographically dispersed entities varies significantly depending on the selected model of cooperation. However, regardless of the nature of the selected form of cooperation, the success of the new organizational set-up of an offshore office is significantly dependent on team members’ ability to work in distributed teams; and this arrangement implies a change from being a *physical organization* towards becoming a *virtual organization*.

Stack & Downing (2005) concluded almost ten years ago that companies are offshoring increasingly complex IT activities to either their own captive centers or to third party vendors. The incredible growth of the Indian IT-service providers over the last decade suggests that this tendency has continued. Thus, organizations all across the globe are faced with a challenge of learning to lead, learn, communicate, solve

complex problems and perform work efficiently and effectively across distance. Whether or not firms find actual cost savings in offshoring such complex work has been, and is still, the subject of intense debate (Levina & Vaast 2008). While this financial discussion is well beyond the scope of this dissertation, I do maintain that it implicitly plays a role – not just in this dissertation, but at large in studies of globally dispersed work. Researchers from a broad variety of disciplines are intrigued by the challenges related to global collaboration, arguably because such collaboration does present unique challenges to the smoothness of collaboration. And by shedding light on the related challenges these researchers all contribute to paving the way for more effective and more efficient global collaboration – and thus, to improving the business case of globally distributed work.

Indeed, many factors play a role in globally distributed collaboration. For instance, within CSCW (computer supported collaborative work) the well-cited article by Olson & Olson (2000) has highlighted the impact of geographical distance and the importance of establishing common ground, coupling of work, collaboration readiness among the stakeholders and collaboration technology readiness. Also, cultural diversity, the onshore staff's motivation for engaging in cross-cultural interaction, the offshore unit's lack of domain knowledge, etc. has received considerable attention (Carmel and Agarwal, 2002; Gregory et al., 2009). Within cross-cultural research a great deal of focus has also been devoted to globally distributed work, for instance Cramton & Hinds (2014) "examines the process through which globally distributed work teams attempt to adapt to cross-cultural differences while being constrained by the local contexts in which they are embedded" (p. 1); Krishna et al. (2004) acknowledges that working across cultures is indeed not a trouble-free endeavor; and van Marrewijk (2010) acknowledges that "cross-cultural cooperation of employees in geographically-distributed project teams has become an important topic in global IT projects" (p. 368) and urges researchers to give more attention to the daily practices of practitioners working in such geographically distributed teams.

Moreover, research on virtual teams has studied the challenges related to creating and sustaining trust, establishing shared meaning and managing conflicts in globally dispersed teams (Greenberg et al. (2007); Hinds & Bailey, 2003; Jarvenpaa & Leidner, 1999). However, within the trust research community only very limited attention has been devoted to understanding trust as it unfolds in geographically dispersed teams. Even though “[t]rust has become widely acknowledged as a crucial factor in inter-organizational relationships [as it] affects a wide range of relationship qualities, from increasing relationship stability to lowering transaction costs for the trusting parties” (Kroeger & Bachmann, 2013: 253), trust research is rarely extended beyond the scope of co-located collaboration.

This dissertation is a contribution to academic literature on global collaboration in general and offshoring and offshore outsourcing in particular. Engaging in offshoring is indeed a case of ‘reconfiguring’ as Jensen et al. (2013) point out by highlighting how the offshoring process essentially follows a process with three main stages, namely that of disintegration (of how work was originally carried out within the company); relocation where the execution of a particular set of tasks is moved offshore; and (re)integration, that is the new way of performing work, when integrated into a greater whole. Arguably, establishing trust and rendering trustworthiness visible is an important aspect of (re)integration. Thus, this dissertation aims at contributing to the body of knowledge on offshoring within the fields of international business and global work by thoroughly investigating the role of trust and trustworthiness in a case of offshore outsourcing. In addition, this dissertation also aims at contributing to the body of knowledge on trust literature. As mentioned only a limited focus within trust research has been aimed at understanding trust in a global, distributed context and it the ambition of this dissertation to add to that body of knowledge, too. Specifically, I aim at contributing to the trust literature, with an interdisciplinary and ethnographic study, where trust is not an isolated construct. Rather it is contextualized and studied as

it unfolds in real life in a globally distributed collaboration and in conjunction with other constructs – specifically, distance, control, culture and boundary spanning.

The Strategic Research Project and my Ethnographic Study

This dissertation does not stand in solitude. It is a part of a larger strategic research project funded by the Danish council for strategic research ('Det Strategiske Forskningsråd') under the Ministry of Higher Education and Science. This strategic research project – the NexGSD project or in full, Next Generation Technologies and Processes for Global Software Development – aims at providing knowledge and tools for organizations to excel in software development on a global scale. Thus, the strategic research project has two distinct ambitions: One is to understand the complexities of doing IT work in an environment characterized by temporal, geographical, and cultural differences; and on the basis of such understanding to develop new ways of conceptualizing and coping with such differences in global projects. The other aim is to design and empirically evaluate next generation technologies and processes for global software development on the basis of the understanding provided by the ethnographic studies of global work.

This dissertation aims at contributing to achieving the first ambition, by unraveling complexities of globally distributed collaboration and devising new ways of reflecting upon and acting in globally dispersed teams. Levina & Vaast (2008) rightly point out that “it requires organizational capability to undertake multiparty collaboration spanning geographic and temporal distances as well as organizational, national, and professional boundaries”(p. 308). I argue that trust is exactly such an organizational capability.

While I conceive of trust as the secret ingredient, the masala, of organizational life, certainly no dish is made up entirely of a spice mix. Control, culture and boundary spanning are other important ingredients. This is not to say that other constructs than these four are unimportant. However, they have appeared as the most important ones

and most promising avenues for research in the specific empirical settings that form the basis of my ethnographic study.

Given the fact that the NexGSD strategic research project precedes my doctoral studies, one can hardly say that I had total freedom in choosing the topic of my dissertation. Indeed, it had to be something that related to understanding the complexities of globally distributed work. This bound overall theme definitely resonated quite well with me, since I have spent several years working with offshore outsourcing in the IT industry. The focus on trust as the central theme emerged from my background as a practitioner, as I had experienced – at that time with a very limited understanding of trust as an academic construct and thus only with a very mundane understanding of trust and trustworthiness – that trust seemed to be pivotal to achieving success in globally distributed teams. Thus, before onboarding the ethnographic studies I knew that trust would play a role, as I was curious as to the role of trust in globally distributed work. The predetermined focus however did not extend to the other three theoretical constructs that turned out to have a central role in this dissertation as they emerged as important influences on the actors' ability and willingness to trust their counterparts in the other organization.

The empirical foundation for this dissertation is an offshore outsourcing collaboration between HCL, one of the largest Indian service providers with a yearly revenue exceeding 5 billion USD, and Berlingske Media, a leading Danish media company with a portfolio of more than forty news and service websites, including two of the top news sites in Denmark (www.b.dk and www.bt.dk). Berlingske Media also run the two corresponding traditional newspapers to these websites (Berlingske Tidende and BT) as well as ten other regional or national newspapers and three radio stations. Thus, Berlingske Media is one of the largest news companies in Denmark. The collaboration between HCL and Berlingske was started in 2012 and includes all IT-operations. A

total of more than eighty full time vendor-side employees are working on the Berlingske Media account.

Starting with a Bang

After I had finalized the formal agreements with the HCL and Berlingske and was about to start my ethnographic field studies at the client-side headquarters in Copenhagen, something interesting happened: On Friday January 18th 2013 the two largest commercial websites (www.b.dk and www.bt.dk) were down for approximately two hours in the middle of the day due to a human error, where one of the HCL employees assigned to the account had mistakenly deleted all DNS entries. Furthermore, due to firewall issues all of the commercial websites owned by Berlingske Media were unavailable from around 9.40 AM until around 3 PM on Tuesday January 22nd 2013. These breakdowns were covered by the two leading IT news sites in Denmark (non of them owned by Berlingske Media) and on those two websites one could first read statements from Berlingske Media's CIO explaining the failures and publicly stating that he expected compensation from HCL (Computerworld.dk, 2013a). It was later retracted in an article where Berlingske Media praised HCL stating that the overall "SLA [service level agreement] fulfillment is excellent. It is quite simply extraordinary. They [HCL] deliver a service that meets all expectations" (Computerworld, 2013c).

All IT-professionals know that errors occur. Even in the most robust setups errors are bound to happen occasionally and it is generally accepted that while errors cannot be completely eliminated IT-organizations should be measured not on the number of errors in isolation, but rather on their ability to respond to such errors and get the services up and running quickly and on their ability to learn from the errors and make sure that the same error does not happen again. However, I found these two errors interesting, because they represented major breakdowns in an outsourcing engagement, which, at that point in time, had been running for less than a year. Now, I shall refrain

from going into details on contractual underpinnings of outsourcing engagements and merely conclude that a company that chooses to outsource IT-operations and IT-infrastructure always inevitably assumes a financial risk and thus renders themselves vulnerable. Thus, on an organizational level trust is always needed when outsourcing such IT activities.

Dansk top-CIO efter nedbrud: Vores outsourcing er stadig et hit

Dansk top-CIO hos Mecom roser it-leverandøren HCL til skyerne på trods talrige Berlingske-nedbrud i løbet af få døgn. Læs hvorfor.



Berlingske: Nyt nedbrud ligner firewall-problem igen

Den præcise årsag til det nedbrud, som ramte en stribe websteder hos Berlingske-koncernen, er endnu ikke klarlagt, men foreløbigt ligner det samme problem som tidligere.

Dansk CIO ramt af to store nedbrud på 48 timer

I løbet af 48 timer oplevede it-direktøren hos Berlingske Media både at miste al strøm i timevis og hele DNS-konfigurationen til de største websites.

22. januar 2013 kl. 10.08



Fejlen fundet: Firewall lammede Berlingske-netmedier i 5 timer

Samtlige websider i Berlingske-koncernen var nede i over fem timer tirsdag. En fejl i firewallen blev udlagt som et DDoS-angreb.

Figure 1.1

This dissertation is not about financial risk, nor is the primary focus on the organizational level. That is, my primary research interest is to understand the role of trust and trustworthiness at an actor level, as the *primary trustor is inevitably a person*. However, the target of trust, the trustee, may be an individual, a team, an organization, an IT-system, a process or some other form of artifact – and these errors stood out: I speculated, that such occurrences would inevitable challenge the client-side actor's perception of the vendor-side's trustworthiness, be it at an individual or organizational level; or in the processes or IT-systems. As it turns out, this string of errors arguably only had a very limited influence on the client-side actors' perception of vendor-side trustworthiness, as they quickly found a solution that seemed to render the errors

insignificant, at least seen from a trust perspective. However, it equipped me with a conversation icebreaker during my first weeks of observation studies and, as one of the vendor-side actors told me on my very first day of observation studies at the Berlingske Media headquarters in Copenhagen: “we’re probably quite low on credit these days” (Field Notes 20130212), signifying that the client-side actors’ trust in them had indeed been reduced.

Framing the Research Questions

I started this introductory chapter by highlighting the important role of trust in all human life. To a great extent ‘to trust’ is something we take for granted; and the importance of trust in everyday life only surfaces, when there is a *trust issue*. While trust is always needed I argue in the lines of Jarvenpaa & Leidner (1999) that “trust is pivotal in a global virtual team to reduce the high levels of uncertainty endemic to the global and technologically based environment” (p. 792), because of the difficulties establishing contextual confidence (Möllering, 2006). Rosen et al. (2005) rhetorically ask: “Does a failure to make a promised entry in the team’s web archive mean that a teammate is struggling with a complex issue, under pressure from on-site management to make other issues a priority, or just slacking off?” (p. 259), which signifies the challenge of distributed work quite well. Globally distributed work is, in the words of Hinds & Bailey (2003) in real danger or being a case of *out of sight, out of sync* and “[w]hen trust is missing, team members are more likely to question others’ intentions and make attributions that do not adequately account for situational factors” (Hinds & Bailey, 2003: 618).

Thus, successful collaboration in globally distributed teams is dependent on trust, but at the same time trusting those remote colleagues or collaborators is not exactly easy. From the body of knowledge on trust we know that to trust is dependent on *antecedents to trust*. In order to trust someone or something, that someone or something must render him-, her- or itself trustworthy in some way or another. Thus,

positive assessment of *trustworthiness* is the first step towards creating trust. Recently Onora O'Neill gave a TED-talk¹ on the topic of 'What we don't understand about trust' in which she argued that "[m]ore trust is not an intelligent aim in this life. Intelligently placed and intelligently refused trust, is the proper aim. What matters in the first place is not trust, its trustworthiness; its judging how trustworthy people are in different respects: Are they competent, are they honest, are they reliable" (O'Neill, 2013). I believe that O'Neill is right in this claim – at least at an actor level. Arguably, more or less trust at a generalized societal level may say something about the society itself, but in our everyday lives – including our working life – trust in itself is not an intelligent aim. Rather, we should focus on intelligent assessments of trustworthiness. In an offshore outsourcing collaboration, as the one that constitute the empirical foundation for this dissertation, it is arguably not more trust, as such, we should pursue at an actor level, but rather understanding of how trustworthy actors can be rendered visible as exactly that, *trustworthy*.

Thus, the focal point of this dissertation is to understand how vendor-side actors – as individuals as well as collectives – are rendered and rendering themselves trustworthy in the eyes of the client-side actors. Two things are worth noting as this point. First, I apply a selective focus, since it is primarily vendor-side trustworthiness in the eyes of the client-side actors that is being investigated. This is not to say that the perceived trustworthiness of the client-side actors and the client organization in the eyes of the vendor-side actors is irrelevant. However, I find the avenue of researching vendor-side trustworthiness more promising: Partly, because of the financial and operative risk that a client faces in an offshore outsourcing context. But also because my ethnographic studies have provided much more empirical material to substantiate this client-side focus than had I chosen a vendor-side perspective. Secondly, I consciously omit to pass

¹ TED-talks are a global set of conferences owned by the private non-profit Sapling Foundation.

judgment on when it is intelligent to assess an actor as trustworthy and when it is not. Rather, my aim is to understand how trustworthiness in globally distributed collaboration is affected by distance, by the use of control mechanisms, by culture, and by the actions of boundary spanners.

Research Questions

Based on the above my main research question reads:

How can vendor-side actors, as individuals and as a collective, be constructed as trustworthy collaborators in the eyes of the client-side actors?

In order to answer the overall research question I will, as mentioned above, apply an interdisciplinary perspective, where trust and trustworthiness are not isolated theoretical constructs, but rather dynamic constructs that influence and are influenced by other constructs. These other constructs have surfaced as important themes throughout my ethnographic studies and will be analyzed in conjunction with trust and trustworthiness in each their chapter. Thus, in the four analytical chapters I aim at answering the questions below, in order to finally answer the main research question above.

Sub Research Questions:

- (1a): What are the perceived challenges of globally distributed collaboration?
- (1b): How does distance influence the actors' perceptions of their inter-organizational counterpart's trustworthiness?
- (2a): How are control mechanisms used in the collaboration between client and vendor?
- (2b): How does the use of control mechanisms affect client-side perceptions of the trustworthiness of vendor-side actors?

- (3): How is vendor-side actors' trustworthiness affected by enactments of cultural boundaries?
- (4): What is the role of boundary spanners and how do these boundary spanners influence perceived trustworthiness of vendor-side actors and the vendor organization?

Guide to Reading

This dissertation is divided into three parts. Part I consists of this chapter (Chapter 1) which introduces the overall research agenda. Chapter II 'Theory on Trust' is the main theoretical chapter in which I introduce my theoretical standpoint on trust and trustworthiness. In Chapter III: 'Constructing the Field' I introduce my methodological stance in light of my adherence to a hermeneutical perspective on theory of science and I elaborate on my own pre-understandings obtained through several years of working with offshore outsourcing as a practitioner. This chapter also presents the methods I have applied throughout my ethnographic field studies; finally I offer some methodological considerations about the multiple roles of the researcher. In Chapter IV: 'Setting the Scene' I present the two industrial partners, HCL and Berlingske Media, in greater detail; and I give an overview of the collaboration in order to acquaint the reader with the empirical context in which I am doing my field studies.

Part II consists of four analytical chapters, which scrutinizes trust and trustworthiness in conjunction with another construct: In Chapter V: 'Challenged by Distance' I analyze what challenges distributed collaboration introduces to the actors from both organization and how distance and mediated communication affect trustworthiness. In Chapter VI: 'Flipping the Switch on Trust and Control' I take a closer look at the use of control mechanisms in the offshore outsourcing collaboration and how the use of control mechanisms affect perceptions of vendor-side trustworthiness. In Chapter VII: 'Trusting across Cultures' I delve into how cultural boundaries shape perceptions of trustworthiness and in Chapter VIII: 'Spanning the Trustworthiness Boundary' I

engage in an analysis of the role of boundary spanners and how they influence client-side actors' perceptions of vendor-side trustworthiness.

These last three analytical chapters are structured in the same way. First, I introduce the research question that the chapter aims to answer. Second, I present a literature review related to "the other" construct (control, culture and boundary spanning, respectively). Third, I relate the theoretical construct to my theoretical stance on trust and trustworthiness. Fourth, I provide an analysis leading towards answering the particular sub-questions posed. Finally I discuss these findings, highlight theoretical and practical contributions and conclude.

The first of the analytical chapters is structured a bit different. It deals with the challenges that the actors perceive that working in a globally distributed environment poses. The purpose of this chapter is to provide an initial understanding of these challenges, which is then brought into play in the following three analytical chapters. Thus, this chapter does not have a separate literature review as it primarily uses the theoretical framework on trust developed in Chapter II.

Part III consists of Chapter IX, where I discuss the overall research question by drawing on the findings from the analytical chapters presented throughout Part II. This chapter is primarily aimed at connecting the four analytical chapters and answering the overall research question. In Chapter X: 'Conclusion and Future Work' I sum up the theoretical and practical contributions and conclude and I reiterate on the theoretical contributions that have been identified and elaborate in the analytical chapters in Part II.

CHAPTER II: THEORY ON TRUST

Introduction

In 1979 the German sociologist Niklas Luhmann noted, “one should expect trust to be increasingly in demand as a means of enduring the complexity of the future which technology will generate” (Paul & McDaniel, 2004: 184). Indeed, Luhmann was right and it is the ambition of this chapter to shed light on the most current discussion among trust scholars on this very subject of trust.

The progression of the chapter will be as follows: First, I will outline the definition of trust I adhere to. Secondly, I will introduce how trust is conceptualized in the vast majority of trust research. Third, I will discuss what is commonly referred to as antecedents to trust. Fourth, I will take a closer look at how trust can be managed. Fifth, I will introduce trust as a multi-level construct and argue that interpersonal trust is just one level of trust we must take into consideration alongside trust in collectives and artifacts. Finally, I will sum of the theoretical perspective on trust that I adhere to and relate this to my agenda on researching trustworthiness in an interdisciplinary perspective.

Empirical studies of trust are predominantly conducted in settings characterized by co-location of actors. Furthermore, the sparse studies of trust in distributed work-environments draw on the same definitions and conceptualizations as research on trust in settings where actors are in physical proximity of each other. Therefore, most of this chapter draws on trust studies of co-located people. However, I have included the most significant research on trust in distributed teams, which I present below in the section on ‘Managing Trust’.

Defining Trust

Over the years trust has been researched within many different paradigms within the world of social science: For instance, rational choice theorists, such as Coleman

(1990), see trust by and large as a question of utility; and neo-institutionalists regard trust as a matter of routines (Zucker, 1986) that are largely beyond the individual or organizational levels and where trust is conceptualized as “a set of expectations shared by all those involved in an exchange” (Zucker, 1986: 54). Others again adopt a process view to trust (e.g. Nooteboom, 1996; Möllering, 2006) signifying that trust is a dynamic construct and that trust is influenced by reason and by routine, but also by the reflexivity of human actors with emotions and at times non-rational behavior.

As trust has been researched within many different research paradigms over the years it has inevitably also been defined in a number of different ways. In 1998 Rousseau and her colleagues published a cross-disciplinary review of trust aimed partly at understanding whether “scholars fundamentally agree or disagree on the meaning of trust” (Rousseau et al., 1998: 394). They arrive at the conclusion that “scholars do appear to agree fundamentally on the meaning of trust” (Rousseau et al., 1998: 395) and that two conditions are essential for trust to arise, namely *risk* and *interdependence*.

Rousseau et al. (1998) stress that if an action can be undertaken without any risk associated with it, trust is not needed. This signifies that we can only speak of trust in cases where the trustor is engaging in a *risky* endeavor at some level. That is, “[u]ncertainty regarding whether the other intends to and will act appropriately is the source of risk” (Rousseau et al., 1998: 395). In this way risk creates an opportunity for trust and thereby for risk-taking, which leads to the second condition, *interdependence*, as Rousseau et al. (1998) signify that we can only speak about trust insofar such risk-taking is necessary in order to achieve one’s interest. That is, if risk-taking and thereby reliance on another party is not necessary to fulfill one’s intention, trust is not necessary – thus, we only speak of trust in situations where trustor and trustee are dependent on each other. In the words of Möllering (2006): “For well-structured problem with clear alternatives and expected values, no reference to trust is necessary”

(p. 106). Based on these two conditions Rousseau et al. (1998) propose the following definition of trust:

“Trust is a psychological state comprising the intention to accept vulnerability based upon positive expectations of the intentions or behavior of another” (Rousseau et al., 1998: 395).

Over the years this definition has become widely accepted among trust scholars. For instance Möllering (2006) adheres to this definition and stresses that we can only speak about trust in cases where “some uncertainty and vulnerability that actors have to deal with by means other than pay-off calculations” (Möllering, 2006: 32); and Dirks & Ferrin (2002) adhere to the same definition “recognizing that researchers have operationalized it in different ways and for different types of leadership referents” in their well cited work on trust in leadership (Dirks & Ferrin, 2002), as well as in their equally well-cited work on the role of trust in organizational settings (Dirks & Ferrin, 2001).

Based on a comprehensive review of trust-related research published in fifteen top-tier journals over the last decade Fulmer & Gelfand (2012) conclude that “the vast majority of trust definitions focus on two key dimensions that have been identified in prior reviews [...]: *positive expectations of trustworthiness*, which generally refers to perceptions, beliefs, or expectations about the trustee’s intention and being able to rely on the trustee, and *willingness to accept vulnerability*, which generally refers to suspension of uncertainty [...] or an intention or a decision to take risk and to depend on the trustee” (Fulmer & Gelfand, 2012: 1171). Finally, Paul & McDaniel (2004) state that “general consensus has been reached that trust is a psychological state based on confident expectations and beliefs that another party will act in a certain manner, and that the trusting party must in some way be vulnerable under conditions of risk and interdependency to actions by the other party” (p. 186). With almost five thousand citations of Rousseau et al. (1998) it seems reasonable to agree with Paul & McDaniel

that general consensus has indeed been reached. In the remainder of this PhD dissertation I too will adhere to the definition proposed by Rousseau et al. (1998).

Conceptualizations of Trust and Trust Related Constructs

The trust literature provides many conceptualizations of trust and trust related constructs in the quest to answer the question “what makes people trust each other?” However, there seems to be agreement on two things. First, whether people engage in a trusting relationship depends on their *propensity to trust*: and second, trusting can be both *cognition-based* and *affect-based*. These two topics – propensity and what trusting behavior is based on – will be addressed in the following two sections.

Propensity to Trust

One of the most famous and well-cited models of trust has been proposed by Mayer et al. (1995) who argue that “[t]rust for a trustee will be a function of the trustee’s perceived ability, benevolence, and integrity and of the trustor’s propensity to trust” (p. 720). Later in this chapter I will return to the notion of perceived ability, benevolence and integrity in greater detail, but for now I shall devote attention to the last part of the sentence, namely the notion of *propensity to trust*. The model proposes that trust can be understood as “a willingness to be vulnerable to another party based on both the trustor’s propensity to trust other in general, and on the trustor’s perception that the particular trustee is trustworthy” (Lewicki & Brinsfiels, 2012: 31) and signifies that trust is not merely a result of concrete assessments of trustworthiness, but also by a general propensity detached from the concrete situation.

A wide range of other trust researchers also addresses this notion of propensity: For instance Zaheer & Zaheer (2006) talk about *cultural dispositions*; Greenberg et al. (2007) label them *predispositions*; Oza et al. (2006) highlight the importance of prior experiences in comparable situations and Uslaner (2012) calls it *moralistic trust* defined as “faith in people whom we don’t know and who are likely to be different from ourselves.” (p. 73). Uslaner (2012) elaborates: “We can’t base trust in strangers

on their trustworthiness, because we don't know them. We must presume that others share our fundamental moral values. We learn trust early in life from our parents and it is largely consistent throughout our lives, resistant to many experiences both good and bad (...) Moralistic trust does not refer to trust in specific persons, but rather trust in strangers more generally" (p. 73). It is referred to as *moralistic trust* because "like a moral value it is relatively stable over time and not based on individual experience. Moralistic trusters see the best in people and rationalize away negative experiences, continuing to place trust in others even though they might experience disappointment. They are not blind to the likelihood of being let down, but go on putting faith in people anyway" (Godall, 2012: 97).

Finally, Ferrin & Gillespie (2010) propose that *macro factors* such as "national wealth, income equality, education, democracy and 'good' government, strong formal institutions and ethnic homogeneity" (p. 65) have an impact on an actor's propensity to trust. Thus, the notion of propensity has many different names in the body of literature on trust, but to a large extent it covers the same phenomenon. In the remainder of this dissertation I adhere to Mayer et al.'s (1995) terminology originating from Rotter (1967) and call it 'propensity to trust'.

By accepting that trusting behavior is not solely based on assessments of trustworthiness of a specific other in a specific situation but also on the trustor's propensity, an analysis of trust must also capture the larger context and historicity of the actors. However, it is striking that these constructs all conceive of propensity to trust as something rather stable; as a "facet of personality influenced by early developmental experiences, and by cultural background" (Dietz et al., 2010: 11). I argue that this understanding of propensity neglects that many of our experiences in life are encountered after these 'early developmental experiences' and these are also likely to have an effect. In line with my understanding of culture and trust as socially constructed phenomena (see Chapter III for a discussion of epistemic stance) I also

argue that our social context repeatedly shapes our propensity. The word itself, ‘propensity’, means ‘a natural inclination’; but claiming that such an inclination is ‘natural’, in the sense taken-for-granted or undisputed, and not shaped throughout life, is unreasonable. Rather than conceiving of propensity as something stable and hard-to-change, we should conceive of it as being constantly in-the-making. I will return to this point in Chapter VII: ‘Trusting Across Cultures’ where I unfold an analysis of the how perceptions and enactment of cultural boundaries influence perceived trustworthiness.

Cognition-based and Affect-based Trust

While the trust research categorizes numerous types of trust, they all seem to fall in two overall categories, namely, cognition-based and affect-based trust (McAllister, 1995), which many trust researchers find to be practically inseparable (Möllering, 2006) as “[t]rust in everyday life is a mix of feeling and rational thinking” (Lewis & Weigert, 1985: 972). Despite this practical mix in everyday life Schaubroeck et al. (2011) note that “it is important to distinguish between affective and cognitive dimensions of trust (...) [as] these trust dimensions are associated with different psychological processes” (p. 864).

Cognition-based trust “is based on the performance-relevant cognitions such as competence, responsibility, reliability, and dependability” (Schaubroeck et al., 2011: 864), and within the trust literature there is a wide range of labels for trust that address the cognitive dimension of trust. These labels include calculative trust; rational trust; contractual trust; knowledge-based trust and performance-based trust (Paul & McDaniel, 2004). They are all instances of cognition-based trust but differ in the sense that they are more precise as to what they address (e.g. contractual trust addresses contracts) or the rationale behind trust (e.g. calculative trust which conceptualizes trust as a form of economic exchange). Consequently, though there are differences in the detailed level of the conceptualizations they are all based on the notion that

trustworthiness is rational and follow a cognitive process consisting of an assessment of trustworthiness, leading to preparedness to engage in a trusting relationship.

As opposed to cognition-based trust, which is based on rational assessments of trustworthiness, “affect-based trust refers to the ‘*emotional bonds between individuals*’ that are grounded upon expressions of ‘*genuine care and concern for the welfare*’ of the other party” (Schaubroeck et al, 2011: 864, authors’ italics) and is as such based on moods and emotions (Chen et al., 2011) rather than on rationality. According to Schaubroeck et al. (2011) affective trust enhances the feeling of *psychological safety* which in turn “enhances members’ willingness to share their knowledge and skills, and as a result, they are not only better able to identify and utilize more effective performance strategies” (Schaubroeck et al., 2011: 864). Later in this chapter, in the section called ‘Managing Trust’, I will take a closer look at the notion of *psychological safety*.

While cognition-based trust and affect-based trust in practice are hard to separate, research also suggests that the mix of these two types of trust changes over time as “the impact of cognitive trust [cognition-based] fades and the impact of affective [affect-based] trust increases” (Greenberg et al., 2007: 332) when actors get to know each other. Consequently, the assessments of trustworthiness also change – from being an assessment of what Schaubroeck et al. (2011) calls *team potency*, consisting of assessment of performance and ability to perform, to a state where trusting behavior is “more affective and intuitive rather than calculative” (Schaubroeck et al., 2011: 865). This shift from cognition-based trust to affect-based trust bears resemblance to Li’s (2011) processual view on trust where *initial weak trust* can develop into *mature strong trust* insofar the modes of trust changes from being characterized by *trust-as-attitude* to being characterized by *trust-as-choice*, where “trust-as-attitude is a reactive and protective psychological assurance of certainty and control, [and] trust-as-choice is

a proactive and promotional behavioural commitment to uncertainty and vulnerability as an opportunity to initiate a trust-building process” (Li, 2011: 414).

Li’s (2011) geocentric framework on trust adds another dimension to the discussion of cognition-based versus affect-based trust, namely *control*, which becomes an integral part of trust-as-attitude. I will get back to the relationship between trust and control in much greater detail in the theoretical framing in Chapter VI: ‘Flipping the Switch on Trust and Control’.

Antecedents to Trust – Ability, Benevolence and Integrity

Arguably, trust has a cognitive and an affective dimension though they are intertwined in practice. Furthermore – as mentioned earlier – trust is broadly acknowledged as being based on three so-called antecedents to trust and characteristics of trustworthiness as presented in the work by Mayer et al. (1995). Greenberg et al. (2007) explain the relationship between the two trust dimensions and the three antecedents to trust like this:

“Trust traditionally arises in two ways. One is based on rational or calculative assessments and is called cognitive [cognition-based] trust. It is the result of an evaluation of evidence of performance reliability and competence. Cognitive [cognition-based] trust has been modeled as a function of the other person's integrity and ability. The second way trust arises is based on emotional ties and is called affective [affect-based] trust. It is the result of the social bonds developed in a reciprocal relationship in which there is genuine care and concern for the welfare of the other person. This type of trust is based on assessments of benevolence.” (Greenberg et al., 2007: 327)

Following Greenberg et al. (2007) we can say that if one perceives another to be able and have integrity we say that that person has cognitive trust in the other. If one

perceives another as benevolent we say that that person has affective trust in the other. Ability and integrity relates to the cognitive dimension of trust, and benevolence relates to the affective dimension of trust. This does not suggest that all trust researchers agree on these trustworthiness indicators, but “the literature suggests an overall image of the trustworthy actor as someone who is able, and willing and consistent in not exploring the trustor’s vulnerability” (Möllering, 2006: 48).

Given the fact that the definition from Rousseau et al. (1998) is so widely accepted this is hardly surprising. Rousseau et al. (1998) emphasize the importance of people’s actions – their behavior – and their underlying motives – intentions – as critical for trust to arise and arguably one’s behavior is at least in part a result of one’s abilities, and one’s intentions towards another person is affected by one’s benevolence towards that person. Finally, one’s integrity can – to a certain extent – be judged by one’s actions. Consequently, *one cannot talk about behavior and integrity without also talking about ability, benevolence and integrity*. Thus, ability, benevolence and integrity can be considered “base characteristics” of trustworthiness. However, this does not rule out the possibility that an analysis of empirical material can reveal other antecedents to trust – which is a topic I will return to in Chapter VII: ‘Trusting Across Cultures’

The Leap of Faith, Suspension and Active Trust

As I have argued above we can only speak of trust insofar there is an element of *risk* involved (Rousseau et al., 1998). To trust is inherently a risky business and thus a trustor has to cope with uncertainty. This is often referred to as a ‘leap of faith’ (Möllering, 2006; Bachmann, 2011) drawing on the philosopher Kierkegaard’s vocabulary. Bachmann (2011) explains this as a process in which “a trustor transforms fuzzy uncertainty (...) into a certain risk which a trustor is prepared to accept” (p. 207). Möllering (2006) has further refined this and conceptualizes such uncertainty-coping as *suspension*, which he finds to be “the essence of trust, because trust as a state of

positive expectation of others can only be reached when reason, routine and reflexivity are combined with suspension” (p. 110). He further explains:

“When actors achieve suspension they treat uncertainty and vulnerability as unproblematic, even if it could turn out that they are problematic. Luhmann [...] describes trust as ‘a movement towards indifference: by introducing trust, certain possibilities of development can be excluded from consideration. Certain dangers which cannot be removed but which should not disrupt actions are neutralized” (Möllering, 2006: 116)

Möllering’s conceptualization of *suspension* is widely acknowledged among trust scholars (Fulmer & Gelfand, 2012) and constitutes a break in trust research, which has traditionally considered “the trustor as a rather passive figure who reaches (or fails to reach) the state of trust on the basis of ‘given’ factors such as her/his own predisposition, the perceived trustworthiness of the trustee, and/or relevant institutional safeguards” (Child & Möllering, 2003: 70). This passive path to trust is what Child & Möllering call *contextual confidence*, which they criticize as they are dissatisfied “with the notion that the trustor can only draw on ‘given’ contextual variables” (Child & Möllering, 2003: 71). Child & Möllering reject that the trustor is a merely a passive figure; and argue that actors “can play a more (pro)active role in trust production, perhaps especially where the contextual foundations for trust are weak” (Child & Möllering, 2003: 71). As a counter-construct to the *contextual confidence* Child & Möllering (2003) introduce the concept of *active trust*, which they borrow from Giddens (1994).

Möllering (2006) explains that “active trust is trust that needs to be worked on continuously by the actors involved through mutual openness and intensive communication: it reflects contingency and change in an ongoing process of reflexive constitution” (p. 100). In their analysis of Hong Kong managers and subordinates from mainland China, Child & Möllering (2003) show that active trust can be used as a

strategy in cross-border collaboration in order to strengthen the basis for trust by for instance working actively on showing commitment and establishing personal rapport.

The cornerstone of active trust is that actors play an active role in establishment and maintenance of trust. Specifically, this agency is materialized when actors deliberately take a *leap of faith* and through this leap of faith achieve a state of suspension. This conceptualization of *suspension* is chosen to stress that it is not something that is done once, nor is it a stable state. Rather it is an ongoing “process that enables actors to deal with irreducible uncertainty and vulnerability” (Möllering, 2006: 110). In his earlier works Luhmann (1979) labeled this *indifference*, which Möllering (2006) elaborates on as an *as-if attitude* where one acts as if unknown and uncertain actions of others are certain. As-if attitude “means that actors interact with each other as if ignorance, doubts and dangers that exist alongside knowledge, convictions and assurances are unproblematic and can be set aside, at least for the time being. [...] The logic of ‘as if’ in trust is specified further as a logic of ‘despite’, ‘although’ and ‘nevertheless’” (Möllering, 2006: 115). Consequently, the as-if attitude is a *will* to trust another person. This way trust both starts and stops with the actor, as agency is needed for trust to emerge.

In the remainder of this dissertation I will use Möllering’s (2006) conceptualization of *suspension* as I believe that this best captures the point that trust building and trust maintenance are ongoing activities where the trustor is repeatedly taking a risk. The trustor is not doing so blindly, but rather as a result of knowing that in order to succeed in an endeavor that requires trust he must take upon him an as-if attitude and act as if he is indifferent. This does not suggest that he is indeed indifferent, but rather that he consciously acknowledges that the situation requires him to act as if he is. Inspired by Luhmann’s (1979) term of indifference and Child & Möllering’s notion of agency, I suggest calling it: *enlightened indifference*.

Managing Trust

“We should abandon the belief that trust is a fragile phenomenon which exists only in intimate relationships between two individuals, largely beyond our influence and control” (Bachmann, 2011: 204)

By abandoning the notion that a trustor is a passive figure, and stating that a trustor has agency and can engage in active trust building by accepting that trust is inherently risky and acting with enlightened indifference to achieve suspension, we must also acknowledge that trust can to some extent be managed. Trust is, as Bachmann (2011) points out, not a fragile phenomenon beyond our influence and control, but rather something we, as actors, can influence. This does of course not mean that a manager can create trust among his or her subordinate team members, but merely that trust can be “self-managed”, so to speak.

Nevertheless, recent literature on trust clearly suggests a number of ways in which trust can be managed within organizations. Common for these managerial techniques is first that they stress the role of leaders as trust catalysts. For instance, Greenberg et al. (2007) suggest that in order to overcome barriers that are related to team members’ disposition to trust it is important that “even before team members first interact, managers need to take steps to create a foundation for trust” (p. 328), by making sure that every team member has personal characteristics that make trust building possible and “if the potential members do not have these characteristics and skills, training should be given in these areas in effort to increase the probability of success” (ibid.). Following a similar line of thought Schaubroeck et al. (2011) signify that “when team members perceive that they are pursuing meaningful, shared objectives through clear processes that have been outlined by the leader, they are more likely to develop high cognition-based trust in the leader” (p. 864); and Rosen et al. (2005) claim that leaders must actively engage in the development of team trust “through shared visions, passion for the task, face-to-face contact and the like” (p. 267). On a higher level, Li (2011)

concludes that “leadership plays a pivotal role in trust building in organizational settings” (p. 415).

The literature reviewed for this chapter reveals no counter-argument against the notion that in an institutional context trust can be managed, though Dietz (2011) claims that “any trust encounter anywhere in the world, in any country, in any sector, and in any relationship can probably be interpreted accurately using this staged model: there is always an assessment (however thorough) of the other party’s trustworthiness which informs a preparedness to be vulnerable that, in genuine cases of trust, leads to a risk-taking act” (p. 215). By saying so Dietz does not as such make a counter-argument against the possibility to manage trust, but puts forward an interpersonal view on trust that significantly opposes the organizational view on trust that is put forward by Bachmann (2011) among others, who argues that it is possible to “make a distinction between two different types of trust: trust can, depending on the way it is generated, either appear in the form of interaction-based trust or as institutional-based trust” (p. 206). Rather, Dietz (2011) argues that “for most trust encounters, the two broad sources [...] – institutional and interactional – not only can co-exist, but probably do” (p. 216) and that “most decisions to trust are informed by evidence from both interactions and institutions” (p. 216). Summing it up, there is consensus in current trust research that trust can be managed, but there is a dispute among trust scholars whether “organizations must address interpersonal trust factors if they want to reap the benefits of newer work relationships” (Paul & McDaniel, 2004: 184) or if stronger focus should be put on institutional factors (Bachmann 2011).

The second commonality for techniques for managing trust between actors is that trust scholars all focus on influencing actors’ “threshold” for taking a leap of faith and hereby affect actors’ willingness to achieve suspension positively and take upon them an as-if attitude. Below I shall attend to six prevailing ideas and management

techniques: Psychological safety, social interaction, task interdependence, reward structures, referral trust and swift trust.

Psychological Safety

In their recent studies of a multinational bank, where Hong Kong and U.S.-based employees were surveyed, Schaubroeck et al. (2011) found that what they call *team psychological safety* plays a significant role when it comes to team performance as “high team psychological safety can improve team members’ engagement at work because it means that members believe they can participate openly and actively without fear of suffering adverse personal consequences, such as being derogated for their ideas and observations or for the manner by which they express them” (p. 864).

Schaubroeck et al. (2011) conclude that team members with a high degree of psychological safety “tend to become more psychologically engaged in team tasks than are members of teams with lower psychological safety”. This psychological safety is largely dependent on how trustworthy the leader is perceived (Schaubroeck et al., 2011), and it corresponds well with Li’s (2011) notion of “paternalistic leadership, delineated by the dimensions of personalized authoritarianism, personalized benevolence and personalized integrity, that emphasizes strong personalized trust in the network domain by turning an organization into an extended family” (p. 429). Another variation of the same is found by Oza et al. (2006) in their studies of client-vendor relationships in outsourcing, in which they conclude that “transparency throughout the project is the most important factor to maintain trust” (p. 352) in the sense that “you have to be upfront and honest with your client. You should not hide anything from him, whether it is good or bad, whether it is going to earn you a flack for that moment. This is very important for the long lasting relationship and to achieve trust” (op. cit. p. 351).

Thus, psychological safety seems to be a common theme with regards to leadership focus when it comes to managing trust development. For most scholars this is done by

the means of the leader's personal attributes and work transparency, which is consistent with the traditional approach within management studies. Furthermore, on the same subject, Rosen et al. (2005) signify the importance of knowledge sharing as “creating a team culture of psychological safety begins with reinforcing all forms of knowledge sharing within the team” (p. 268).

Social Interaction

Within the trust literature the importance of social interaction for building trust is repeatedly mentioned (e.g. Chung & Jackson, 2004; Li, 2011; Möllering, 2006) as personal engagement is regarded as an imperative means to build trust and because trust is constructed discursively. In the words of Möllering (2006): “social networks clearly matter for trust as trustors and trustees are embedded in relationships with each other” (p. 196). By agreeing on social interaction as inherent in trust building and trust maintenance I fundamentally part with the notion that trust is a “rational choice only” construct – a notion which Coleman (1990) is arguably the most prominent advocate for. However, this does not suggest that irrationality is the dominant feature of trust development, but merely that trust has a non-rational side to it – an emotional side, which has already been discussed earlier in this chapter by introducing the notion of affect-based trust.

The idea that trust is partly non-rational can be described as ‘I trust him because I like him’ in line with the thinking of Lewis & Weigert (1985) who stress that “trust succeeds where rational prediction alone would fail” (p. 969). Consequently, a professional relationship will grow stronger in terms of trust development insofar the involved actors not only engage with each other on a strictly professional level, but also invest in getting to know each other on a personal level as such non-task related communication is conducive for trust development.

Task Interdependence

Psychological safety and social interaction both have a positive influence on trust development. However, much more practical and hands-on matters are also shown to be conducive to trust development: In their 2011 article Schaubroeck and colleagues found that trust is positively affected when team members are working towards a common and well defined goal. Moreover, Chung & Jackson (2011) report that “task interdependence has been widely recognised as a characteristic that influences employee attitudes and behaviours” (p. 68), and subsequently that a high level of trust requires that the work that is to be done by the team is done in a manner where they are highly dependent on each other’s contributions. Chung & Jackson (2011) draw on a “four-level hierarchy of task interdependence: pooled interdependence, sequential interdependence, reciprocal interdependence and team interdependence” (p. 70) where pooled interdependence is defined as interdependence in which the team members each contribute independently and that these contributions are put together subsequently and thus, the team members are independent of each other to perform their part of the work. Sequential interdependence is defined as a situation where the one team member is dependent on another team member’s delivery to start his or her own. Reciprocal interdependence adds a cyclical dimension to the sequential interdependence. Finally, team interdependence “is the highest level of task interdependence; it requires that all team members work together simultaneously and make job-related decisions collectively to complete a project” (Chung & Jackson, 2011: 71). Thus, according to the findings of Chung & Jackson (2011) there is evidence that trust building and task interdependence is of a reciprocal nature, where more interaction can lead to higher levels of trust, but, obviously, at the same time also is more dependent on trusting behavior and risk-taking.

Reward Structures

While the influence of psychological safety and social interaction are mentioned in one way or the other by many trust scholars the same cannot be said about the influence of reward structures. However, it is worth mentioning as rewards are indeed central to trust in a professional context, and although not much light has been shed on this subject it is particularly important to mention in an empirical context such as the one studied in this dissertation, characterized by inter-organizational collaboration, where one organization is the client and another is the vendor and revenue streams are thus moved between organizations. Here it is plausible that the reward structure significantly differs across organizational boundaries.

Greenberg et al. (2007) find evidence that: “In general, competitive rewards have a strong negative influence on trust and cooperative rewards have a strong positive influence on trust. Competitive rewards can detrimentally influence the willingness to share information. They can also influence the way team members perceive the behavior of others and result in negative evaluation of others' integrity.” (p. 329). Consequently, if actors are rewarded according to the same success criteria – if they are working towards the same common goal, as Schaubroeck et al. (2011) would put it – they will easier develop trust than if this is not the case. Greenberg et al. (2007) do not specify what they mean by ‘reward’. It can mean a financial reward, but it could also be a broader notion of reward including for instance appreciation in different non-monetary forms.

Referral Trust

Jøsang et al. (2006) introduce the concept of *referral trust*, by suggesting that in some instances trust can be transitive:

“Trust transitivity means, for example, that if Alice trusts Bob who trusts Eric, then Alice will also trust Eric. This assumes that Bob actually tells

Alice that he trusts Eric, which is called a recommendation.” (Jøsang et al., 2006: 85)

The central idea in referral trust is that a trustor is able to trust other, and to them unknown, actors (the trustee) by the means of a referral from a trusted actor, who trusts the trustee. That is, if a person trusts e.g. his auto-mechanic (1), which Jøsang et al. (2006) designates as *direct functional trust* and another person trusts the person that trusts the auto-mechanic (*direct referral trust*) and thus finds this actors *recommendation* of the auto-mechanic credible (2), then the trustor is said to have *indirect functional trust* in the auto-mechanic (3). This is illustrated below in figure 2.1.

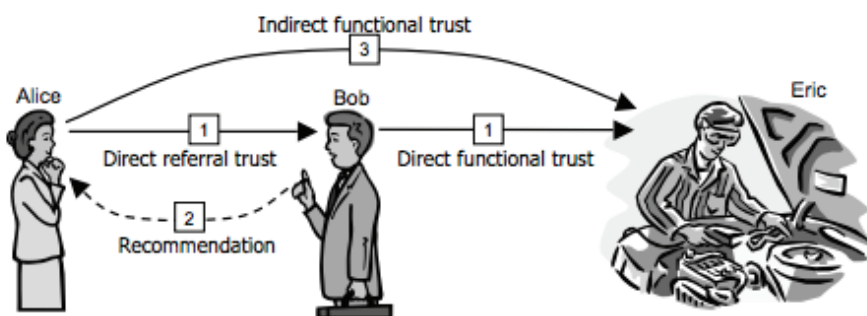


Figure 2.1 Jøsang et al. 2006: 86

The notion of referral trust as described by Jøsang et al. (2006) is embedded in the Information Systems (IS) research and is not as such a topic within the trust research community, nor does it relate much to the extensive body of literature within trust research. However, I believe it is worth mentioning as it resonates well with two powerful constructs within the trust research community: active trust and swift trust.

As described earlier in this chapter active trust (Child & Möllering, 2003) entails agency among the actors. Thus, trust is not merely built on given and external factors

but can also be established by an active effort by the actors. Referral trust is exactly such an active effort, where the trustor by realizing his or her lack of knowledge about a potential trustee engages with a middleman and by the means of referral seeks to build trust in the unknown potential trustee.

Swift Trust

The notion of referral trust bears resemblance to *swift trust* coined by Meyerson et al. (1996). In this well-cited work Meyerson et al. (1996) argue that in temporary work teams a role-based form of trust, which they label *swift trust*, can emerge. This form of trust is based on roles. Meyerson et al. (1996) argue that “[i]f people in temporary systems deal with one another more as roles than as individuals – which is likely because the system is built of strangers interacting to meet a deadline – then expectations should be more stable, less capricious, more standardized, and defined more in terms of tasks and specialties than personalities” (p. 173). Thus, Meyerson et al. (1996) argue that a personal relationship is not necessary in temporary work groups as long as the tasks, objectives and roles are clearly defined as “the care of valuable things can be entrusted to individuals who seem fit to these institution-driven categories” (p. 175).

Arguably, swift trust does not only apply to temporary work groups, but also to long-term relationships, where people deal with each other as roles rather than as individuals (see Möllering, 2006: 67). Furthermore, the notions of swift trust and referral trust bears resemblance to one another as they are both occupied with establishing trust based on referrals – on one side to referrals about individuals on the other to referrals about common goals and well-defined roles within the system.

Summing Up: How Can Trust Be Managed?

In this section I have attended to the question on how trust can be managed by drawing on a number of scholars’ work. I have introduced six different themes related to

managing trust: Psychological safety, social interaction, task interdependence, reward structures, referral trust and swift trust. While the first notion presented, psychological safety, has a certain generic and meta-level flavor to it, other notions are indeed more practical and hands-on. A common denominator is that psychological safety seems to be the goal for the five other notions in the sense that they all are aimed at establishing exactly that, a feeling of psychological safety among the actors – each in their own way.

Before moving on to discussing trust at different levels, there is, however, one thing that is worth noticing, namely that the understandings of how to manage trust are somewhat different: Some scholars argue that in order to establish a trusting work-environment it is necessary to bring the actors closer together by the means of social interaction and a high degree of task interdependence. Other scholars argue that trust can indeed be established without such closeness by the means of intermediaries, either in the form of a reference person or by an organizational setup with well-defined roles and common goals. Arguably, there are different paths to manage development of trust.

Researching Trust as a Multi-Level Construct

At the outset of this chapter I pledged adherence to the definition of trust from Rousseau et al. (1998), where trust is understood as a *psychological state*. This clearly suggests that a trustor is a human actor insofar *psychological* is something we can only talk about for individuals. That is, machines do not have an inner life. However, this does not exclude that a trustor can also be a collective of individuals (Fulmer & Gelfand, 2012)

The second half of the definition from Rousseau et al. (1998) does not suggest that the trustee, the one in whom the trustor trusts, has to be either an individual or a collective of individuals. The definition merely reads that we say that we trust when we are in a psychological state where we are prepared to accept a certain risk and vulnerability “based upon positive expectations or behavior of another” (Rousseau et al., 1998: 395).

This ‘another’ can be an individual. It can also be a collective of individuals (e.g. a team, an organization or another community) and it can also be a non-human actor – for instance a machine, a process, a report or some other artifact though the vast majority of trust research is occupied with understanding trust at an interpersonal level (Fulmer & Gelfand, 2012).

So far I have, for the most part, dealt with trust as most trust scholars do: at the interpersonal level with the notable exception, namely the section on managing trust, where most literature covered look at trust at a collective level. However, despite the fact that trust *in* non-human actors or collectives of individuals and *by* collectives of individuals has received scarce attention over the years it is arguably an important aspect of trust. Thus, I agree with Fulmer & Gelfand (2012) when they claim that a “truly multilevel view of trust will ultimately inform both researchers and practitioners on this fundamental process in organizations” (p. 1214).

In their comprehensive review of trust literature Fulmer & Gelfand (2012) make a distinction between trust *at a level* and trust *in a referent*. Trust *at a level* denominates who the trustor is, which in their review is divided into three levels: Individual, team and organization. Trust *in a referent* denominates whom the object of trust, the trustee, is. In their review they distinguish between the same three levels again: individual, team and organization. As their purpose is to understand prior research in an organizational context they have omitted trust in artifacts from their literature review. However, I argue that trust artifacts should also be taken into consideration – especially when investigating an empirical context of global IT-work, as artifacts play a predominant role in such a context; one may for example consider the reliance on technology for communication and coordination.

Furthermore, the distinction between ‘the team’ and ‘the organization’ in Fulmer & Gelfand’s (2012) literature review is unclear as they fail to define what exactly constitutes a team, respectively an organization. A common understanding of a team is

a group of people that work close together, but one could say the same about an organization. Thus, in order to understand what constitutes a team and an organization, we must make a distinction between *how* close actors work together. Rather than making such a distinction *a priori*, I argue that we can all-together understand trust by merely distinguishing between an individual level on one hand and a collective on the other hand, where the latter encompasses both teams and organizations. By doing so I adhere to the established distinction between interpersonal and institutional trust of which Bachmann (2011) is a prominent exponent.

Thus, when I turn to analyze trust I will do so by understanding trust as a multi-level construct with two types of trustors (individuals and collectives) and three types of trustees (individual, collective and artifact). However, it should be duly noted that the trustor as a collective can only be inferred by looking at individuals and listening to individual actors' voices. From here a collective trustor may or may not be inferred (I will get back to that issue in more detail in Chapter VII: 'Trusting Across Cultures').

Summing-Up: Theoretical Perspectives on Trust

In this chapter I have outlined recent achievements within trust research as well as commonly accepted notions about trust. By doing so I have also outlined my theoretical stance on the construct of trust.

Throughout this dissertation I will adhere to the definition of trust as proposed by Rousseau et al. (1998), where trust is defined as a psychological state in which a trustor is prepared to accept risk and vulnerability, which is then reflected in his or her actions. A trustor is willing to accept such risks and uncertainties based on his or her propensity to trust as well as conscious or unconscious assessments of – in the case of a human trustor or a group – the trustee's perceived ability, benevolence and integrity; and in the case of a non-human trustor on the ability and integrity of the trusted artifact.

The three antecedents to trust – ability, benevolence and integrity – are repeatedly referred to by trust researchers and I have argued how these three antecedents are intertwined with the definition itself. However, this does not rule out the possibility that other antecedents to trust can be found in specific empirical contexts (which is a point I will return to in Chapter VII: ‘Trusting across Cultures’).

I have also introduced the notion of *active trust* coined by Child & Möllering (2003), which suggests that development of trust does not solely rely on given factors, what Child & Möllering (2003) calls *contextual confidence*, but also on the trustor’s agency used to actively engage in trust building. By adhering to the notion of *active trust* I also agree that trust can be managed. That is, in order to develop and maintain trust we can actively engage in activities that support trust building and we can build organizational structures that pave the way for trusting relationships. The cornerstone of managing trust seems to be that the trustors perceive the context as safe, which can be catered for by social interaction, a high degree of task interdependence, collective reward structures as well as the possibility to make use of referral trust and swift trust.

Researching Trustworthiness in an Interdisciplinary Perspective

As outlined earlier the aim of this dissertation is to research trustworthiness as trustworthiness is the basic condition for trust to emerge – and to do so in an interdisciplinary perspective by including sociological theory on control; theory on culture and cross-cultural team work; boundary spanning literature and to a certain extent also scholarly work from the CSCW (computer supported collaborative work) tradition. That is, the dissertation aims to understand trustworthiness in a concrete empirical setting and how the constructs control, culture and boundary spanning influence trustworthiness.

Most trust related research is engaged in understanding trust by applying a quantitative approach. McEvily & Tortoriello (2011) recently conducted a review of trust literature where they found 207 different measurements of trust (McEvily & Tortoriello, 2011:

27). In their conclusion they ask whether the expanding body of research on trust will have an enduring impact on organizational literature. As an answer to this question they assess “that the answer depends critically on the state of measurement practice going forward. Unless the ‘Balkanisation’ of measures that is currently endemic to the field is replaced by a more coherent and unified approach, we believe that the potential will be severely constrained” (McEvily & Tortoriello, 2011: 41). While I am not occupied with quantitative research the number of measurements do however pose a problem that should be addressed in qualitative research too: If measurements are so diverse how can we as qualitative researchers claim that our understanding of constructs, such as assessments of ability, benevolence and integrity, are reasonable? I argue that by laying forward elaborate descriptions of the empirical context and making room for the empirical actors’ own accounts I do circumvent this problem to a certain extent, as I provide a basis for the reader to judge whether my interpretation of trustworthiness assessments is reasonable and in line with the definitions and constructs I adhere to (a point which I will attend to in greater detail in Chapter: III: ‘Constructing the Field’).

Additionally, most trust research is occupied with understanding outcome rather than process. That is, trust scholars are by and large interested in understanding to what extent trust is present in a given empirical context. My aim is (again, unlike the majority) to understand trust building as a *process*. Instead of asking questions such as “Is trust present and why / why not” I aim to understand the foundation of trust, namely trustworthiness. Hereby, my research questions are more related to the process of developing and maintaining trust, rather than to the outcome at a specific point of time. Thus, my research questions evolve around a curiosity on how a foundation for trust can be established by looking into how actors’ assess each other and certain artifacts in terms of antecedents to trust.

Furthermore, I aim at doing so by applying an interdisciplinary perspective, where trust and trustworthiness are not isolated theoretical constructs, but rather dynamic constructs that influence and are influenced by other constructs. These other constructs that will be presented in this dissertation is control, culture and boundary spanning. As a combined literature review on trust as well as these three other constructs would result in a *massive* literature review, I have opted for an alternative approach, where I have laid out my understanding of trust in these chapters and where the theoretical foundation for the other three constructs will be presented in the beginning of the chapters in which they will be put to analytical use.

CHAPTER III: CONSTRUCTING THE FIELD

... As a Consequence of Practice Experience

During the three years I have been working on producing this doctoral dissertation I have on numerous occasions found myself in a situations, where fellow researchers have critically asked "How do you know that trust is important?" when I have presented my research agenda.

Indeed, a substantial number of researchers interested in global software development and virtual teamwork adhere to grounded theory and as a consequence they would argue, as one did, that "You should start at a higher level and apply a grounded approach so you don't risk forcing theory onto your empirical subject". While I do believe that this is a noble idea, I am also convinced that it is practically impossible to detach oneself from earlier experiences – academic as well as practical. Therefore, let me start by outlining my own professional background.

I have been working in the IT-industry for quite a few years. Over the years I have been trusted with a variety of roles: First, helpdesk and support, later on business analysis, project management, enterprise architecture and even occasionally a bit of programming. Early 2009 I took up a new challenge, when I accepted an offer from my at that time employer, a leading financial institution in Denmark, to move to Bangalore in India to join a team of four other native Danish colleagues and eight Indians in the management team of the largest – both at that time and now almost six years later – offshore outsourcing engagement embarked upon by a Danish IT-organization.

During my expatriation to India I was heavily involved in the day-to-day management of the collaboration between the two organizations, including optimization of processes related allocation and de-allocation of Indian consultants, performance measurements as well as numerous other things relating to the overall collaboration. Furthermore, I was heading the expansion and daily management of a BPO (business process

outsourcing) function. As a natural consequence of my occupation I got a first hand understanding of the challenges related to collaborating across distance, culture, time zones and organizational boundaries; as well as a good taste of the differences between working and living in my home country of Denmark and in India.

After repatriating to Denmark I was put in charge of a team of twenty-five Indian consultants assigned to a department consisting of nearly hundred Danish employees. I remember my first meeting with the Senior Vice President, who was leading the department: He explained to me that they had – in accordance with the senior management’s strategy – been expanding the offshore team over the last three years and it had now grown to a size where there was one Indian consultant assigned to the department for every four Danish employees. He also voiced his concern that the Indian consultants were not performing adequately and that the Danes in the department were generally dissatisfied with their Indian “colleagues” as they found that the Indians did not take responsibility and that the time invested in knowledge sharing exceeded the output in a way where the majority of the Danish employees felt that “if I have to spend so much time specifying work for the Indians, I might as well do the whole task myself”. It sounded exactly like a challenge for me and I took the job.

I was charged with the overall responsibility for the performance of the Indian consultants in a staff-augmentation outsourcing engagement where the client side took all management responsibilities with regards to performance and the Indian consultants were considered “extra hands” – an extension to the Danish department, so to speak. My job included allocating qualified Indian consultants for tasks and projects in the Danish organization and making sure that they performed as expected and in accordance with what was agreed. In some cases I was managing the tasks and projects they were assigned to and in other cases the day-to-day management resided under another member of the department’s management team in Denmark.

After embarking on my new job I quickly found out that what the Senior Vice President had told me was not at all an exaggeration. Most of the Danish employees I spoke to did nothing to conceal the fact that they would rather avoid working with the Indian consultants. On the other side the Indian consultants were disappointed that they were only assigned the most trivial tasks and that they were by and large treated as inferior by their Danish counterparts who were not perceived as helpful and who – in the eyes of the Indian consultants – would often just neglect emails from them. The Indians were often sitting idle waiting for something to do and despite the fact that the Danes – management as well as employees – knew of this, nothing was done. The one-to-five ratio had been dictated by the CIO's office and it was quite simply easier just having twenty-five Indian consultants sitting idle than to put an effort into making good use of them.

During my stint as manager for the team I implemented a broad range of initiatives aimed at integrating the Indian consultants more in the department: I changed the way Danish employees and Indian consultants coordinated efforts; I took upon myself the responsibility for a large number of tasks in order to be able to get the Indian consultants in the loop and to integrate them in the department; I started communicating the strategies and visions of the department to the Indian consultants and urged the Senior Vice President to include the team of Indian consultants in department meetings which, as a consequence, were changed to being conducted in English instead of Danish and with video-support; and I started to introduce elaborate reports and assessments of the quality of tasks completed in order to make the contributions and qualities of the Indian consultants more transparent.

Over a period of fifteen months I was basically in the driving seat of a significant change in the way the offshore collaboration was executed on a day-to-day basis. Gradually I saw how the negative stories about the Indians lack of competence faded and positive stories about their contribution emerged instead. Over this period of time

the work climate changed dramatically: The Indian consultants were to a larger degree considered a valuable asset and they were, themselves, telling me how they found the new responsibilities that were bestowed upon them motivating and how they were now happy to be a part of the department and saw a future for themselves in their current jobs.

What had changed? Why were the Danish employees all of a sudden talking about their Indian *colleagues* and acknowledging their competences and efforts? Indeed, I had ramped out a few of the Indian consultants, whom I did not believe were technically strong or communicatively capable to become a success in the department, but the vast majority of Indian consultants were the same as when I started. My assessment was, and is, that the most significant change was that I had successfully managed to redefine *collaboration* from something that was characterized by annoyance of the presence of “the strangers” to something characterized, at least to some extent, by group effort and a we-are-in-this-together mentality.

One late Thursday afternoon I was sitting in the office in Copenhagen when I overheard a conversation between some of my Danish colleagues. It was close to deadline of a new release – a situation all IT-professionals know is notoriously stressful. My Danish colleagues had found out that one of the Indian consultants had made a mistake, which could potentially delay the release. Their conversation was striking: There is no doubt in my mind that had the same situation occurred a year earlier the Danish employees would have been nagging about how the Indian consultant were not taking responsibility and were not capable of doing the job, but now it was all different: One of the Danish employees stated that it was really late in India (3.5 hour time difference) and that the Indian consultant had been working long hours. They all agreed that she had made a mistake but in the same breath acknowledged human fallibility and reasoned that while the mistake was indeed

serious and the Indian consultant was at fault, they should help her out, so she did not have to spend the whole night in office.

What happened? The Danish employees seemed to exhibit a sense of collegiality, they reasoned that the Indian consultant had done her best and furthermore that her normal performance was high and that she was a dependable person. This incident, as well as others, made me wonder what had changed. My conclusion was that we had managed to create a work environment where the Indian consultant's efforts and abilities were rendered visible and that this change had caused a higher level of trust between the actors – and it lead me to conclude that *trust* seemed to be the differentiator.

Now, I have never been known as a strong finisher and at that time I felt that I had done my share of work. The Danish/Indian collaboration had changed a lot – and all to the better. Indeed, much more work could be done to further improve the collaboration, but I felt it was time to move on. Around the same time the opportunity to engage in research as a PhD fellow at Copenhagen Business School arose and I thought: Over the last couple of years I have been spending ninety percent of my time putting out fires and ten percent thinking about why offshore outsourcing is so difficult and how it can be improved. Why not turn the bucket around and spend ninety percent of my time on understanding the inherent difficulties of such collaboration and how it can be improved?

From the outset I knew that my project would be about trust in global collaboration and this brings me back to the critical question I started out this chapter by laying forth a question I have often been asked: “How do You know that trust is important?”

One could argue that I cannot know that trust (and trustworthiness) is relevant to study in the given empirical context beforehand. I disagree. The vast body of literature on trust (see Chapter II) argues that trust is necessary in all human endeavors. We simply cannot live productive lives without some level of trust in our surroundings – humans

as well as artifacts. Thus, trust and trustworthiness is of course also significant in the concrete empirical context I am studying: an offshore outsourcing collaboration between a Danish media company and an Indian IT-service provider with global presence. This does not suggest that trust and trustworthiness is a *problem*, in the mundane understanding of the word, in this specific context – not at all. But it does suggest that trust and trustworthiness is worth studying from a theoretical perspective as well as from a practical perspective: My own background as well as a vast body of literature (see for instance Jarvenpaa & Leidner, 1999; Rosen et al., 2005; Greenberg et al., 2007) suggests that building and sustaining trust in distributed team work is by no means a trivial matter.

Furthermore, I do not suggest that by studying trust and trustworthiness, I have chosen *the* most important and pressing issue in my specific empirical context. Arguably, deciding objectively on what is most important is impossible as the focus is relying on the eye of the beholder. Hence, other researchers with different practical and academic backgrounds than mine would most certainly identify other topics as important.

Being an Existential Hermeneutist

In the first pages of this chapter I have outlined my own practical background and argued that my background will inevitably influence how we construct the field and make sense of empirical observations. Thus, it will probably be of no great surprise to the reader when I say that I adhere to the hermeneutical school of thought. In this part of the chapter I will unfold my epistemological stance in greater detail: If we accept that preconceptions are inevitable, we are in need of a methodology that can help us understand the relationship between our own personal history and the interpretations we make as researchers and enable us to productively make use of our preconceptions. The hermeneutical dialogue is such a methodology. I find it to be a promising one.

Lifeworld, Being-in-the-World & Belonging

Within hermeneutics there are two different schools of thought that dominate the discussion. Alvesson & Sköldberg (2009: 57) call them the *objectivist school* and the *alethic school*. What separates these two schools of thought is primarily the discussion about whether or not one can think of the world as something external to the observing subject. The objectivists accept this subject-object duality where the *alethic* hermeneutist reject the same.

The most significant scholars belonging to the *alethic* school of thought are the *existential hermeneuticians* – Husserl, Heidegger and Gadamer. Each with their own concept – Husserl’s ‘Lifeworld’, Heidegger’s ‘Being-in-the-world’ and Gadamer’s ‘Belonging’ (Alvesson & Sköldberg 2009: 81) – they argue that the *experiences* of a human being makes it impossible to separate the individual observing from the observed.

“The existential hermeneuticians who entered the stage from the 1930s rejected the difference between subject and object, and oriented their interest towards what Heidegger (1962) called Being-in-the-world (in-der-Welt-sein). We are irrevocably merged with our world, already before any conscious reflection, and the polarization between a thinking subject and an object is therefore a dubious secondary construction. Consequently, the concept of understanding in objectivist hermeneutics is called into question, since it builds on the polarity between an empathizing subject and a (human) object for empathy” (Alvesson & Sköldberg 2009: 80)

The concept of *experience* is the fulcrum of existential hermeneutics. It is the “fundamental, always already given, something with which every exploration of reality or mental processes must *start*” (Alvesson & Sköldberg 2009: 55). Two things are important to notice: First, *experience* is never a passive observation of events. On the contrary it is an active engagement in the world, where the idea that one can observe

facts free of interpretation, is refused. Rather *experience* is active in the sense that the understanding that observation of something result in, is shaped by prior the observers prior experience. This leads us to the second important thing to notice, namely that experience is never *in singular*. It is never one perception that shapes *experience*, but rather a string of events that connects the observed “with the whole life of the individual, making up an organic part of this” (Alvesson & Sköldbberg 2009: 55)

Following the concept of *experience* is also that *existential hermeneuticians* do not distinguish between *meaning* and *significance*. Thus, what the *intent* of something written, spoken or enacted cannot be separated from how it is interpreted. Again, this aligns with the argument that there is nothing that is objectively observable and therefore it simply does not make sense to speak of an inherent meaning, as something that can be deduced, as it will always be affected by the interpreter’s *experience*.

Another way of elaborating the difference between the objectivist school of thought and the alethic school of thought is by focusing on the naming. Alvesson & Sköldbberg (2009) write that they “have chosen to designate this hermeneutics *alethic*, with a neologism derived from the Greek *aletheia*, or uncoveredness – the revelation of something hidden” (p. 58). Thus: “Alethic hermeneutics dissolves the polarity between subject and object into a more primordial, original situation of understanding, characterized instead by a disclosing structure. That is, the basic idea concerns the *revelation of something hidden*, rather than the correspondence between subjective thinking and objective reality” (Alvesson & Sköldbberg 2009: 57). This stands in stark contrast to the *objectivist* school of thought, where focus is to reveal an *objective* reality.

Though there are also differences between the concepts of the *existential hermeneutists*, that is Husserl’s ‘Lifeworld’, Heidegger’s ‘Being-in-the-world’ and Gadamer’s ‘Belonging’ they all have a common focus on the inseparability between subject and object, due to *experience*. In the following I shall use Husserl’s term:

Lifeworld, when referring to this inseparability. This for a couple of reasons: It is, I believe, the most commonly used and understood term of the three; it is more elegant than Heidegger's term; and it is not a part of our common everyday vocabulary as the word belonging and thus we do not risk confusing the scientific concept with the mundane use of a word.

Let me end this section by explicitly adhering to the school of thought and concepts of the *existential hermeneutist*; I believe that separating object and subject will result analytical results that fail to incorporate the "wild card" that the researcher's own *experience* and thus it is only by explicitly accepting *experience*, that we can avoid giving an unduly ultimate power to the researcher. We are all in a sense "victims" of our own historicity and our analytical results inevitably affected by our *experience*.

The Inevitability of Preconceptions

I speculate that when colleagues are asking how I know that trust is important they do so due to the influence of *grounded theory* (Glaser & Strauss, 1967) which – especially among CSCW researchers is an often-used methodological stance. Strauss & Corbin's (1998) warning about creation of theory: "one must remember that because *emergence* is the foundation of our approach to theory building, a researcher cannot enter an investigation with a list of preconceived concepts, a guiding theoretical framework, or a well thought out design. Concepts and design must be allowed to emerge from the data" (p. 34, original emphasis). This warning seems to influence a lot of researchers' methodological perspectives. However appealing this may seem, I must maintain that believing that one can conduct fieldwork with no preconceptions is an illusion. As Gadamer (2004: 244) reminds us meaning only occurs on the basis of *already established expectations* and being open to new understandings does not require *neutrality* nor does it require *self-annihilation* but rather that one explicates one's own prejudices (Gadamer 2004: p. 288). This means that whatever '*reality*' the researcher is faced with it is *always already* interpreted; it is a product of the researcher's past and

preferences and never an objective reality, which seems to be exactly what Glaser & Strauss are striving to reach. As Alvesson & Sköldbberg (2009) point out “data never come in the shape of pure drops from an original virgin source; they are always merged with theory at the very moment of their genesis” (p. 17).

As Gadamer (1975) says: “The meaning exists at the beginning of any [...] research as well as at the end: as the choice of the theme to be investigated, the awakening of the desire to investigate, as the gaining of the new problematic” (p. 251). Or as Thomas & James (2006) put it: “why is the researcher there at all? There must be some assumption that the chosen topic is a worthy field for study [...] There can be little doubt that some process of verification—albeit implicit rather than explicit—is going on” (p. 783). Thomas & James (2006) continue by elaborating on the problems surrounding the notion of grounded theory:

“There is a central problem in the search for grounded theory. It is that there is no untethered spirit existing in the minds of researchers which will enable them neutrally and inertly to lay some cognitive framework over the data they collect to allow them to draw ‘theory’ dispassionately from this data, this ground. These researchers are human beings who walk, talk to friends, tend their gardens, watch television, read books, go to lectures. They have histories of friendships, relationships, of household life of one kind or another. They understand guile, happiness, sadness, envy, deceit, irony. Their heads are full of notions— notions about equality, justice, freedom, education, the future, hope, fraternity, charity, feeding the cat and parking the car. These are precisely the things that comprise and give structure to their mental lives. They are what make the drawing of themes from the data possible. They are not things which can be put to one side temporarily for the purpose of discovering grounded theory”. (Thomas & James 2006: 783)

In the introduction to their classic book 'The Discovery of Grounded Theory' Glaser & Strauss (1967) claim that they "believe that grounded theory will be more successful than theories logically deduced from a priori assumptions" (p. 6), but as we have learned from Gadamer "a priori assumptions are un-eliminable, and this condition – far from being a source of anguish – is what the qualitative researcher should expect: a priori assumptions are what make study (a) worthwhile, and (b) possible" (Thomas & James 2006: 782) and consequently "there is, in other words, no 'ground' when interpretation is being spoken of" (Thomas & James 2006: 785).

The inevitability of prejudice does however not imply that we cannot learn anything from Glaser & Strauss. Indeed, they do bring forward a very valid point that having read too much about a particular area prior to empirical work may put the researcher in a tough spot, where it is hard to see beyond the already known theories. However, too weak an insight into the research field also has its drawbacks, such as the possible reinvention of the wheel (Alvesson & Sköldbberg 2009: 17). That is, a research outcome that brings nothing new to the table, simply because the researcher is unaware of work already performed by other researchers. Consequently, what the researcher may see as novelty may be old news to other researcher within the same field.

In all fairness Glaser & Strauss do advice against coming underprepared. According to (Alvesson & Sköldbberg 2009) it is stated in a note (in Glaser & Strauss 1967: footnote 3) that "the researcher does not approach reality as a *tabula rasa*. He must have a perspective that will help him see relevant data and abstract significant categories from his scrutiny of the data" (p. 17). However, it is not clear how one can know what constitute such a *perspective*. Neither is it clear how one as a researcher can reassure oneself of actually having this.

Elsewhere Glaser & Strauss states, according to Alvesson & Sköldbberg (2009), that an "effective strategy is, at first, literally to ignore the literature of theory and facts on the area under study, in order to assure that the emergence of categories will not be

contaminated by concepts more suited to different areas. Similarities and convergences with the literature can be established after the analytic core of categories has emerged” (p. 37). Again, it seems difficult, if not impossible, to determine when “the analytic core” has emerged –and may I add, ignoring “facts” on the area seems to be a rather dangerous strategy that may very well result in missing out significant events and interactions simply because of lack of basic understanding. Also, refusing to prepare on such facts may bring about questions relating to the researcher’s abilities or engagement by the people she is studying. The researcher may be perceived as ignorant – and in turn, this may jeopardize the access to do empirical research.

Last, but not least, there is a real risk that lack of preparation will result in trivial knowledge (see Alvesson & Sköldberg 2009: 29 for examples) that does not contribute to neither researchers nor practitioners: “There is an imminent risk of belabouring the obvious” or producing “mere reformulations of what the actors themselves are saying or of the researcher’s own common-sense ponderings” (Alvesson & Sköldberg 2009: 33).

While there is hardly any fix for preparing too little (beside the obvious: preparing more and better!) the hermeneutic tradition does have a solution for how to go about one’s past experiences and readings: Rather than refusing one’s own prejudice hermeneutists accept it, brings it to the front stage and tries to use it productively in what is referred to as the hermeneutical dialogue. “This is a ‘dialogue’ between the initial understanding, based on the theoretical concepts, and the new facts and findings that were extracted from the texts” (Breeman 2012: 154). This is indeed “the hermeneutic method’s core activity” (Breeman 2012: 154) that hermeneutists use to both question what the texts (or in my case, primarily observations and interviews) tell based on their prior experiences and at the same time listen to, and make sense of, what is told. Through this constant movement between preconceptions and new experiences, new understanding is developed. Breeman (2012) explains that “during the reading of

the texts, the interpreter initially asks questions which are directly derived from his preconceptions. Concurrently, however, the interpreter should also look for new ‘facts’ that contradict the preconceptions and push him to specify or adjust his conceptions” (p. 154).

Consequently, by adhering to a hermeneutic methodology, where the researcher acknowledges his own history and proactively tries to expose his preconceptions and uses his intellect to make sense of the empirical observations and provide transparency to the sense-making process, one must reject the approach suggested by grounded theorists, where one should enter the field in, if not *tabula rasa* state then, a self-imposed state of amnesia or deliberate ignorance, and where data’s dependency on theoretical and practical background is perpetually ignored.

Doing Ethnography

The majority of research efforts aimed at understanding trust are conducted using quantitative methods, often in the form of lab experiments. However, recent research on trust has called out for more qualitative approaches to study trust and to study trust in real-life scenarios (Möllering, 2005) in order to not just expand the understanding of trust in itself, but also to understand how trust is established, maintained, repaired and broken in specific contexts. Moreover, researchers have started casting doubt on the values of surveys in terms of analyzing trust (Smallbone & Lyon, 2002; Welter & Alex, 2012)

According to Wilson & Chaddha (2009) “it is generally acknowledged that ethnography enables social scientists to uncover relationships that have not been explicitly spelled out in theoretical formulations” (p. 550) and thus I am setting out to engage in ethnographic research in order to understand trust and trustworthiness in the context of offshore outsourcing of IT work. In other words, my ambition by doing ethnography is to provide “a detailed, in-depth description of everyday life and practice” (Forsey, 2010: 567) in the case companies in order to understand the

complexities of distributed collaboration across distance, culture, time zones and organizational boundaries.

When conducting empirical research on a delicate and complex matter such as trust and trustworthiness it is of utmost importance to gain insights into how trust is established, maintained, confirmed, repaired and broken, in situ, as opposed to a “bird’s eye view” (Hazen, 1993: 16) where we are not only likely to “miss the more intimate sounds of people speaking, singing, or crying out to one another” (ibid.); but also confined to develop our understanding on the basis of retrospective interview data. Thus, in order to understand trust and trustworthiness as it unfolds I employ an ethnographic approach, defined by Crang & Cook as “participant observation plus any other appropriate methods” (Forsey, 2010: 566).

Forsey (2010) elaborates that included in the ‘other’ category are interviews, focus groups, video or photographic work, statistics, modeling, archive work, and so on” (p. 566). Consequently, participant observation is only one aspect of doing ethnography, which can purposefully be supplemented by interviews and other methods. Hereby, I also adhere to Forsey’s (2010) notion that surveys and archive work cannot stand alone as “it is difficult to imagine arriving at adequate understandings through survey work or by research that does not seek some form of deep contact that engages with the cultural and structural content of a person’s life” (p. 567). Furthermore I agree that interviews are a necessary supplement to participant observation to gain in-depth understanding of the everyday life and practices observed (Forsey 2010) as well as the actors’ sensemaking.

Thus, while the ethnographic study in this dissertation consists first and foremost (at least measured by the hours invested) of participant observation to gain a deeper understanding of the phenomenon by investigating it within a real life context (Cassell & Symon, 2004) semi-structured interviews have also been conducted to gain in-depth understanding of the context of practices observed; and to grasp the “complex pattern

of organizational, work-group, professional and interpersonal loyalties” (Cassell & Symon, 2004: 21). Finally, document analysis of company-internal documents as well as publicly available information has established a basic understanding of the organizational environment and the respective organizations’ strategies. These three methods will be elaborated in greater detail in the sections below.

Getting Access to the Field

From the very outset of my PhD project it was decided that I should engage in an ethnographic field study of collaboration between a client based in Denmark and an Indian IT-service provider. In line with many other researchers it proved difficult to identify industrial partners that were willing to open their offices, not only to interviews, but also to participant observation.

After quite a struggle and a process that took several months the Indian IT mastodon HCL appeared as a potential industrial partner, who were willing to provide access and took an interest in my research project. After finalizing the contractual agreement between CBS and HCL the work on getting “the other side” in place started: As I sat out to study an interorganizational collaboration confirmation from HCL was not enough, I also needed acceptance from one of their Danish clients. Luckily, Berlingske Media, one of the largest media companies in Denmark also took an interest in my project and the empirical object of my research was settled.

In hindsight neither HCL nor Berlingske Media were difficult to convince, but before closing the deal with these two companies, we – my supervisor Professor Dr. Anne-Marie Søderberg and myself – had been in contact with several IT-service providers and after finalizing the agreement with HCL I had also been knocking at the door of several of HCL’s clients in Denmark. Most were interested, but due to various timing issues as well as attitude Berlingske Media ended up being the selected partner. When that was settled it was agreed that I should start participant observation at Berlingske

Media's headquarters in Copenhagen and subsequently conduct participant observation and interviews at the Operation Management Center (OMC) in Chennai, India.

Observations

The ethnographic study was conducted over a twelve-month period starting in February 2013. During this period of time approximately five hundred hours of participant observation has been conducted. I have observed office-life at the client-side IT-department in Copenhagen, Denmark as well as in the Operations Management Center (OMC) at the suppliers premises in Chennai, India, including numerous virtual meetings mediated through phone or Skype between representatives of the organizations; physical meetings related to the outsourcing collaboration; local staff meetings; and substantial number of informal conversations with the staff.

Even though my primary contacts at the client's organization were keen on having me "hanging around" we mutually agreed that the best way to kick-start my observation studies would be to come by and present myself, the purpose of my research and my methods at their bi-weekly department meeting a few days prior to my first day as participant observer. At this meeting I presented myself with a strong emphasis on my practical background. I knew beforehand that only a few of the employees came with an academic degree and I speculated that emphasizing my practice experience would help gain legitimacy in this particular setting. I also presented my area of research, but only at a very high level: I explained that I was interested in global collaboration within the IT industry, but I avoided mentioning my primary interest in trust (I will come back to why later in this chapter). My assessment of the first presentation was quite simply: "That went really well" (Field Notes 20130208). Several of the employees were curious about my research and me; and no one seemed uncomfortable with having me around.

Observation Venues

Hanging around the Office in Denmark

On Tuesday February 12th 2013 I arrived at the office at 9.30 AM as agreed with my contact person. I was equipped with an access-card that would enable me to move freely around in the office; I was registered in their systems and given an email address which was included in the IT-departments as well as the company-wide groups enabling me to read all communication sent via these distribution lists, view other's calendars and book interviews; and I was given access to the intranet as well as a variety of reports and tools related to the IT-departments work and communication with the service provider. By and large I was inducted in the department as if I was employed in the company and I was given access to an abundance of data.



After these initial formalities I went to sit with the IT-ops – the Director of Operations and the three service managers who are the primary touch points between the remainder of the client organization and the service provider (which I will describe in greater detail in the next chapter). The three service managers all took a great deal of interest in my research and we spent some time talking together. For me this was ideal, as I wanted to get off to a good start with them and make sure that they were comfortable having me around. I explained to them that I would appreciate if they invited me for all relevant meetings they had and if they could let me shadow them as much as possible. They all agreed – and indeed followed through: Over the time I have

spent at the client's premises they have been very forthcoming with regards to inviting me for their meetings – physical as well as virtual.

I spent the first couple of weeks shadowing (Czarniawska-Joerges, 2007) the service managers and I quickly became a natural part of their work environment – or at least, I did not sense that they were behaving unnatural when I was around: I did not experience any change in the ongoing conversations when I came back after for instance getting coffee; on several occasions they asked me in a very inclusive manner “are you coming?” when they left their desks for meetings; I became a part of the social environment and spoke with them about family, leisure time, football, travelling and a lot of other stuff. They were indeed accommodating and did not seem to be affected by my presence. This can probably be attributed both to my approach, to their personalities, but I speculate that the fact that they were working in an open office environment, where everybody could listen in was an important factor too as they are simply quite used to having “strangers” in close proximity during work hours.

After spending a couple of weeks with the service managers I arrived one morning in office and saw that “my” desk was occupied by somebody else – a colleague of theirs who are for the most part working in one of the client-side offices in Jutland. As there was free seating in the department, there was nothing unusual in him taking the desk, as he needed to work with the service managers. I took the opportunity to move to another group of desks, where the Indian vendor-side employees were sitting. They knew me beforehand and knew the purpose of my stay, so a polite question on whether it was ok that I sat in “their” area was all it took. I had considered for a while when I should move to observe other actors, so the fact that “my” seat was taken came in handy as I all of a sudden had a natural reason for shifting desk. The Indian vendor-side actors bid me welcome and much like my experience with the client-side service managers they did not seem to take much notice of my presence. I stayed in their part of the office two weeks before moving on.

The third group I sat with was the native Danish vendor-side employees – and again, they bit me welcome, were ready to talk, but their daily work seemed uninterrupted by my presence. After spending a little less than two weeks in their part of the office I shifted strategy and started changing seat more frequently. Sometimes I would plan before coming in to the office where I would spend the day, depending on who I assessed would be more relevant to follow, sometimes I chose my desk more at random: If someone greeted me good morning with more than the simple “good morning” I would ask if I could sit there and in other cases I simply sat where there was most activity. As my focus on the service managers intensified and I discovered that the vast majority of communication between client-side and vendor-side actors would go through them, I decided to predominantly sit close by them, as I had discovered that I missed out on impromptu meetings, when I sat elsewhere.

Observing Meetings in Denmark

From the outset of my observation studies I had agreed with my contact persons that I would observe meetings related to the collaboration between the client and the vendor and during the time I spent in the Copenhagen office I was indeed invited for quite a lot of meetings – specifically change board meetings, service delivery meetings, department meetings and various ad hoc meetings. In addition to meetings with participation of the client-side service managers I also participated in the steering group meetings. My meeting participation is listed in table 3.1 below.

Observing meetings have given me valuable insights into how the actors from the two organizational entities communicate. Throughout my observation of meetings I have attempted to be the famous “fly on the wall”, who for the most part is unnoticed. I assess that I have succeeded in this – at least for the most part. There are however some instances, where my presence have been noticed and where I have been taken in as an active part of the meetings. These instances will be discussed later in this chapter in the section on ‘Methodological Considerations’.

Type / Name	Frequency	Meetings Attended	Description	Participants
Change Board Meeting	Weekly	12	Weekly meeting where pending changes are discussed.	Two client-side service managers, resident vendor-side service manager, change manager, involved vendor-side team leads and technical leads
Service Delivery Meeting	Monthly	5	Monthly meeting where SLA achievements is discussed alongside outstanding issues.	Client-side head of operations, two client-side service managers, vendor-side service delivery manager, vendor-side development manager
Steering Group Meeting	Quarterly	2	Executive's meeting where a quarterly report on SLA achievements is discussed alongside the initiatives for the coming period and critical incidents in the past period.	Client-side CIO, client-side head of projects, Client-side head of operations, vendor-side service delivery manager, vendor-side development manager, vendor-side account manager, vendor-side head of account executive
Department Meetings	Bi-weekly	11	Meeting where the client-side CIO and client-side staff meet to discuss current affairs.	All employees in the client-side IT department, native Danish vendor-side staff
Ad Hoc	Ad Hoc	16	Various Ad hoc meetings instigated to discuss specific matters	Ad hoc

Table 3.1

As the majority of these meetings are aided by ICT there is inevitably a challenge in observing meetings that relates to the fact that one side of the meeting is more observable than the other(s). That is, as most of the meetings are conducted as phone meetings, the location in which I am present is more observable than the other location(s): I can see how the actors situated at the same location as myself are communicating *offline* by for instance muting the phone line, miming and making gestures, whereas similar physical expressions and on-location communication at the other location(s) is rendered invisible.

Lunch and Learn

From the outset of my field studies at the client's office in Copenhagen I have taken all opportunities to mingle with both client-side and onsite vendor-side employees for lunch. From the very start I noticed that having lunch with the actors provided a good platform for learning more about their thoughts about the collaboration and also to establish rapport with the actors. During these lunches I have often been asked about the progress of my studies and the actors have curiously asked if I had found anything of interest and if I could share my insights (a point I will return to later in this chapter).

Additionally, these lunches proved beneficial to gain a more in-depth understanding of what I had observed and I have repeatedly enquired about significance and meaning of things I had observed and hereby encouraged the actors to elaborate on my observations. It is a well-established truth that such informal conversation can be highly informative: People are relaxed and have more time to talk than any other time of day and I would go to the extent of saying that the lunches perhaps contributed with the most valuable insights of all the situations I have observed. Thus, after having lunch with two of the service managers one day in June 2013 it seemed natural to accompany the vendor-side service manager for a second lunch, when he saw me in office and asked "are you joining for lunch?"

Accompanying Client-Side Delegation to India

In September 2013, six months after starting my observation studies at the client's headquarters in Copenhagen I was invited to accompany a client-side delegation consisting of the CIO, the Director of IT-operations, two service managers, the development manager, chief architect and two project managers on week-long trip to the OMC in Chennai, India.

During this trip I decided to shadow the two service managers in all their meetings. As a consequence, I was unable to attend some of the meetings with a more strategic direction between executives from the client and the vendor, as the two service managers (and to a certain extent also the Director of IT-Operations) were primarily involved in meetings with a more operational agenda: During the week-long visit I sat in on all the meetings that the service manager's had with the various operational teams as well as meetings with the incident managers and the change manager. In all of these meetings both client-side service managers were present as well as the vendor-side service delivery manager, who bears the direct management responsibility of the operational deliveries as well as being HR manager for the vendor-side consultants.

At the outset of these meetings I would let the client-side and the vendor-side actors meet and greet first. Afterwards I would quickly introduce myself, and my reason for participating. I did so in order to ensure that the vendor-side consultants knew why I was sitting in the corner of the room taking notes. However, in four of these meetings, I did not introduce myself, for the simple reason that no one else did. Below is an excerpt of my field notes from the beginning of two of these meetings:

"We start the day by entering the big conference room. After a while [the two client-side service managers] and myself leave the room to go to meetings with the track leads in the 'Amber' meeting room. After half an hour we start with a group of five. They enter and sit down. There is absolutely no communication from [the two client-side service managers]."

Non, whatsoever! The Indians take initiative to shake hands. The meeting starts with [one of the vendor-side actors] presenting after [one of the client-side service managers] has done the initial formal greeting where he says that it is good to meet them. But nothing in the [client-side service managers'] attitude reveals that they actually do. It's a really weird start of the meeting". (Field Notes 20130911)

"A little after 12 the security team comes in. No one says hi. Everybody just sits there. 15 minutes later the security team lead starts talking and present the other people in the room". (Field Notes 20130912)

Not presenting myself felt strange. While I do know that the vendor-side service delivery manager in his capacity as manager for the OMC-team had mentioned to them that a researcher would be accompanying the client-side delegation, I did not know how much they knew about me. Additionally, I found it awkward to sit in the room and observing a meeting without so much as a "hi" being exchanged. Nevertheless, given the fact that I, as a participant observer, should make as little "noise" as possible I found it more suitable to follow the leads of the actors – if they would not take the initiative to greet each other in some form or another I would refrain from doing so too – despite the awkwardness I felt.

In addition to shadowing the two client-side service managers I also participated in several social arrangements during the visit at the OMC, including two dinners with the client-side delegation and executives as well as operational managers from the vendor-side. But the social aspect of the trip also included breakfasts, after-hours drinks, dinners as well as one very long – and very liquid – evening with the client-side delegation. During these social events I had a chance to talk a lot and in a very informal way with the client-side delegation about their perceptions of the collaboration with then vendor and the perceived value of such visits. While I do believe that I had managed to establish rapport the client-side actors much earlier than

this trip the outcome of the these talks definitely helped fuel the post-India-trip interviews I conducted during late September and early October 2013 after getting back to Copenhagen.

Hanging Around the Office in India

In January 2014 I returned to Chennai to conduct observation studies and interviews at the OMC. The vendor-side service delivery manager had been very accommodating in letting me have a desk at the OMC and to freely engage with and interview vendor-side actors. Just as in the client's headquarters I was given an access card, which allowed me to move freely around in the OMC. During the visit I sat near some of the vendor-side actors with most interaction with the client-side actors, including the service delivery manager himself, the change manager and one of the incident managers and from that position I could follow the everyday-work-life at the OMC.

The service delivery manager had informed the OMC staff that I would be doing observation studies as well as interviews; so all vendor-side actors I met with had an idea about the purpose of my visit. Most of them also knew me from my last visit and everybody seemed happy to take time to talk to me and asked me about my background, my research and my findings.

In office I spent a great deal of time interviewing the first day and by the means of these interviews as well as my contact persons help I managed to get involved in the more social aspects of the work-day, where I accompanied different vendor-side actors on coffee breaks and for lunches all throughout the week. This gave me an opportunity to talk to them in a more informal setting, which helped me to understand their professional backgrounds, education career goals and dreams as well as – in some cases their personal backgrounds.

From my own earlier professional experience working in India I knew that colleagues in India often go out together in the evening. This was not the case here, which one

explained to me was because of the timings of their work: As per the client-side's request the vendor-side actors mostly worked according to Danish work schedules, which, because of the time difference, meant that they would not be leaving office before nine or ten in the evening. Consequently, and also because of significant commuting time, most would be eager to get home to their families as quick as possible after work. I was however invited out for dinner one evening by the service delivery manager, who took the chance to ask me about my findings, but also took the opportunity to ask more in-depth about how, according to my observations, the client-side felt towards the collaboration in general. Later in this chapter I will offer my thought on the dilemma of 'giving back' without interfering and influencing the empirical object under study.

Field Notes – in a Variety of Formats

From the outset of my observation studies I have been keeping an elaborate log of my observations. In total more than 100 pages of field notes have been produced and I have attempted to write as elaborate notes as possible, where observations that did not seem apparently relevant have been noted alongside incidents that had an immediate impact on my understanding of the empirical case under investigation.

During my observation studies I implemented a practice of going through my field notes of the day at the end of each workday highlight observations that I deemed significant in order to focus my attention in the coming days and weeks of observation studies and to make sure that I could ask the actors to elaborate on my observations during interviews and informal talks around the office.

As mentioned above lunches have been an excellent source of knowledge. The same goes for impromptu chats in the corridor; on the way to and from meetings; when stumbling upon someone in the coffee kitchen; and at the local bar for after-hours drinks on Fridays. All these situations have one thing in common, namely the distance between and my computer. Thus, throughout my observation studies I have often been

in situations where I could not take notes directly on my laptop. As a consequence, in addition to notes taken directly in a text editor on my computer, I have repeatedly found myself in situations, where I had to take notes on a scrap of paper or on my phone as soon as possible after the observation. I have also used the voice note function on my phone in several instances – twice by rushing to the rest room and recording my notes. Such notes have also been scrutinized at the end of the work day and roughly transcribed in my field notes master document.

Interviews

As I have argued earlier in this chapter, I regard interviews as a necessary supplement to participant observation to gain in-depth understanding of the everyday life and practices observed. In this regard I have used interviews to present my observations and to get the actor's elaborate perception of significant observations. This practice has helped me gain a more thorough understanding of my own observation, but has also on a number of occasions changed my immediate interpretations.

Furthermore, I have used interviews as a “conversation kick starter” in the sense that I have repeatedly found that introducing specific observations opens a deeper and more nuanced conversation than more abstract questions which the actors typically provide shorter, less elaborate and – I speculate, often – standardized answers to.

Throughout all interviews I have followed a similar structure. First, I have told the actors what the purpose of the interview would be and in cases where I interviewed actors that were unfamiliar with me or my research I would also briefly introduce myself and the overall purpose and methods of my research. Second, I have asked the interviewees for permission to record the interview, which, in all instances has been granted. Third, I have emphasized that I would conduct the interview more as a conversation than as a question/answer-session and elaborated on the semi-structured form of the interviews by explaining that while I had prepared some high-level question I did not have a fixed scheme of questions to be answered. The semi-

structured form allowed the interviewees to elaborate and steer the discussion into areas they perceived as relevant (Gertsen & Soderberg, 2011).

In total I have conducted thirty-one of such formal semi-structured interviews, each lasting approximately one hour, with employees and managers from the client organization as well as the supplier organization. All interviews have subsequently been transcribed and coded into various themes and sub-themes. These themes are reflected in the analytical chapters: One such theme is about ‘distance and trustworthiness’, one about ‘trustworthiness and control’, one about trustworthiness in an interorganizational and intercultural setting’ and one about ‘boundary spanners and trustworthiness’. Below in table 3.2 is an overview of the interviews conducted.

Organizational Affinity	Interviewee Group	Number of interviews	Notes
Client-side	Project Managers	2	
	Service Managers	5	Two of the service managers have been interviewed twice. Second interview post the client-side visit at the OMC in September 2013
	Senior Management	4	CIO and Head of project organization interviewed once each. Director of IT operations interviewed twice. Second interview post client-side visit to the OMC in September 2013
	Development	2	Development Manager and Chief Architect
Vendor-side	Onsite staff	6	Vendor-side Service manager interviewed twice.
	OMC Management	2	Service Delivery Manager and Head of Development
	Incident and Change Managers	2	
	Team leads and team members	7	

Table 3.2

Document Analysis

In addition to participant observation, informal conversations and semi-structured interviews scrutiny of company-internal documents as well as publicly available information has established a basic understanding of the organizational environment. With regards to the publicly available information I have used a wide range of sources including the two companies own websites to establish an understanding of the organization and history of the organizations. In addition the book by the former CEO of HCL, Vineet Nayar, entitled *Employees First, Customers Second: Turning Conventional Management Upside Down* (2010) has proved beneficial to understand the vendor's organization as seen from the point of senior executive management and throughout my field work to engage with vendor-side actors to discuss some of the philosophies of their employer.

A significant source of information that I have used to engage with the client-side actors has been a series of article published in the Danish online IT media Computerworld.dk and Version2.dk: Less than two weeks before I started my observation studies the collaboration between the client and vendor was put under significant pressure as the client's media sites were unreachable for a longer period of time due to technical errors by the vendor. This resulted in six articles in the abovementioned media, where members of the senior management of the client's organization discussed the technical shortcomings publicly (which I will return to in greater detail in Chapter IV). These articles provided a good foundation for discussing the collaboration with client-side actors, as dissatisfaction had been made public by the management.

In addition to publicly available information the client organization also gave me access to a lot of company-internal information including processes, policies, reports and measurement tools used in the collaboration between the client and the vendor. These artifacts has helped me establish a more elaborate understanding related to

governance and the forms of communication that are used in the collaboration than what would have been possible had I “only” had access to participant observation and interviews.

Methodological Considerations & The Role of the Researcher

So far in this chapter I have introduced my own professional background; I have unfolded my epistemic stance and I have outlined how I have engaged with the empirical subject of my dissertation. In the remained of this chapter I will, on the basis of my epistemic stance and the methods I have applied, discuss the most important methodological considerations related to doing ethnographic field work, including, but not limited to, the role of the researcher.

Observing the Unobservable

When conducting ethnographic field studies of globally dispersed teams a fundamental challenge relating to the observations occur: Given the nature of the collaboration a large part of the communication between the dispersed parties is difficult, if not impossible, to observe. While it is indeed possible to observe video meetings and phone conferences by being present at one of the locations (and thus missing out on what happens outside the reach of the technology used, such as conversations with the phone muted) and also possible to observe physical meetings, the same cannot be said about one-on-one phone conversations, emails and instant messaging. That is, a large proportion of what defines the collaboration as globally distributed is by and large unobservable.

During recent years there has been attempts to conduct *virtual ethnography* (Randall et al., 2007) where the “screen life” of the actors is being recorded and subsequently analyzed. I have not engaged in such a practice for a number of reasons: First, it requires a technological setup, which, I assessed, would not be accepted by the IT-security departments in the two organizations I have been engaging with. Additionally, I speculate that if they would accept it, it would take a lot of time and effort to

negotiate this access, which would take time away from other relevant observation studies and probably impose a delay on the start of my ethnographic field studies.

Second, I am of the conviction that virtual ethnography with regards to the privacy of the actors and their level of comfort differs significantly from ordinary participant observation; as everything they do on their computers will be documented. This stands in stark contrast to the type of participant observation I have been engaged with as I, as a human observer, can document using my own vocabulary – in text or speech – and thus the documentation will always be a matter of interpretation and with limited possibility to revisit what actually happened. This, I argue is significantly different than participant observation where I would for instance videotape the room I am observing. In my opinion this distinction is important and resembles the commonly discussed topic of CCTV, where there is a vast group arguing against the use of such technologies, arguing it is surveillance. Placing a police officer at the same spot on the other hand is not regarded as surveillance, but rather framed positively, as protection.

Third, and most importantly, I argue that the incompleteness that follows the lack of ability (and wish) to follow all the digital traces of the actors, is in fact much similar to ordinary co-located observation studies, insofar actors in a co-located environment, also talk on the phone, use instant messages and emails with co-located colleagues, and engage in discussions outside the physical reach of the participant observer eyes and ears. In such cases, I suspect that no one would advise that the participant observer takes measures to vade in on such communication!

While I argue that there are able reasons for not engaging in virtual ethnography this, however, does not reject that it is indeed a challenge: Virtual communication is paramount in distributed teams and if one is not about to engage in virtual ethnography one has to obtain an understanding of such communication in a different way. What I have done is to make elaborate field notes of what is being talked about and how the actor's behave (i.e. do they show frustration, aggression, seem relaxed etc.) when

talking on the phone within the reach of my ears and eyes. Furthermore, I have made it significant themes in both interviews and through informal conversations to gain an understanding of the actor's use of technology. By and large their use of technology is quite simple: The vast majority of communicative tasks are done through phone meetings (which I have observed in significant amounts); via email or through the use of standard reporting tools. That is, only very few actors engage in instant messaging and phone conversations with their counterpart in the other organizations. Thus, the benefit of actually engaging in virtual ethnography would quite possibly be low and not justify the amount of preparation, negotiation, technological implementation and the possible risk of being conceived of as surveillance. In the analytical part of this dissertation I will get back to the use of technology in much greater detail.

The Emergence of Themes: Asking about Trust – without Asking about Trust

Although I adhere to a hermeneutical epistemological stance and thus reject the idea most predominant within grounded theory that researchers should *discover* (Strauss & Corbin, 1998) empirical phenomena and subsequently theorize without a pre-defined theoretical perspective, as I do not believe that this is at all possible, I do agree with grounded theorists to a certain extent in that the researcher should make a substantial effort in avoiding that a personal, professional and academic interest is imposed upon the actors in the field, as there is a risk that this forced agenda is given more attention than it maybe deserves. That is, if I as a researcher approach the actors in the field with a clearly defined agenda of researching trust and trustworthiness, there is a chance that they overemphasize the relevance of trust to accommodate me.

From the outset of my fieldwork this challenge has been at the top of my mind and as a consequence I chose to deliberately describe my research interests towards the actors in a very broad way. That is, though my primary interest is to study trust and trustworthiness I have made a point of not directly asking about trust during interviews

and informal conversations, in order not to force an agenda of trust onto the interviewees. In some cases the actors themselves have started to talk about trust when asked about for instance the collaboration and the relationships, and I have used these opportunities to explore the topic deeper. Also, inspired by Meyer et al. (1995) I have enquired about the antecedents to trust – ability, integrity and benevolence – and asked actors to elaborate on their assessments of these three constructs during both interviews and informal conversations.

During the time where I did participant observation four sub-themes emerged and became important aspects of my dissertation. These four sub-themes, which I devote each a chapter to, were not based on pre-determined theoretical interests from my part, but are to a certain extent guided by my practice experience within the IT-outsourcing industry and to a certain extent guided by what I – in lack of better words – would call “obvious subjects”. First, *distance* is an inherent feature in cross-locational collaboration by definition and thus the topic of “what technologies to use and how” is in a sense natural. Second, *control* is tightly coupled to trust. Thus, the topic of control was in my mind at a very early stage, but ended up being overwhelmingly more significant than I had first imagined. Third, *culture* was something that the client-side actors repeatedly brought to the table. Throughout the first months of participant observation I was repeatedly confronted with the client-side actors’ perception about the role of culture – that is, national culture – and therefore, this became one of the dissertation’s central themes. Fourth, *boundary spanning* was a theoretical theme that I was convinced from the outset would become central, but also a theme which the actor’s themselves, without me prompting for it, addressed repeatedly. Due to the organizational setup of the collaboration, including hierarchies, processes and governance structures I also regard boundary spanning a “obvious subject” alongside use of technology as the actors – due to the organizational setup – experience that the collaboration happens *through* these boundary spanners.

Striking a Balance between ‘Remaining Neutral’ and ‘Giving Back’?

The researchers neutrality has been a reoccurring theme throughout my fieldwork, where I, on several occasions have experienced how difficult it is to remain neutral, while at the same time being open to giving something back to the actors, who are investing their time in talking to me. When I worked on “closing the deal” with HCL and Berlingske Media I assessed that emphasizing my background within the IT-outsourcing industry would contribute positively to their willingness to allow me to conduct an ethnographic study in the respective companies. I succeeded in obtaining the access I wanted and I believe that my industry background has helped me gain initial confidence at the managerial level in both organizations and that this has opened up doors for me that would otherwise have been difficult, or maybe even impossible, to crack open. But it was indeed at a cost. For example, before a conference call with a handful of HCL account managers, which was arranged in order to help me get access to their clients, the Managing Director of HCL in Denmark wrote this to the account managers: “The research will help us immensely in optimizing our delivery approach with Danish clients (...) if we can make sure Thomas gets access to the information he needs”. A similar line of reasoning was expressed by the senior management at Berlingske Media, who clearly expected that I would not “only” contribute with a research project, but also with practical insights that would be immediately usable. For instance, at one point in time the Director of IT-operations at Berlingske Media told me that he would like my input on re-designing the governance of the outsourcing engagement – something that was clearly out of scope, seen from the perspective of my doctoral research, which I explained to him and he accepted.

Early in my observation studies two incidents prompted my attention towards the challenge of remaining neutral: First, I attended a meeting at the client-side office with participation from the client organization only. The agenda was to discuss how certain administrative processes could be made more efficient. In the middle of the meeting

another client-side actor enters the meeting room to convey that there were significant problems with the DNS, which, in this instance meant that no one could access their email. This was the second time this problem occurred (first time with significantly more severe consequences, which I will get back to in the analytical part of the dissertation) and allegedly caused by a human error, from the same person who caused the first instance of the problem. The focus of the meeting participants changed completely: The right people were in the room and this was an urgent matter – I stuck around to see the intensity grow. Half an hour later the problem was sorted out and operations were back to normal. During this half hour the actors had repeatedly been on the phone with the vendor-side actors at the OMC to solve the problem. Finally, they could relax. One of them asks with a very tired voice “How the hell can he make that mistake *twice*” (Field Notes 20130213). Then he looks up and around the room. No one says anything. Finally, he looks at me and I can’t help myself cracking a joke: “At least he is consistent” (ibid.), I said. Everybody in the room laughed and while I think that this remark contributed positively to my acceptance in the group and helped grow confidence, it was hardly a suitable comment to make by someone who is there to *observe* participants in a neutral fashion.

The second incident occurred a few weeks later, where one of the vendor-side actors asked me curiously: “Are you their guy or ours?” (Field Notes 20130226). While I assess that the question was not posed because the actor felt uncomfortable in any way, it still made me think a lot about how I should position myself when engaging with the empirical actors. Together, these two incidents made it crystal clear to me that it required a conscious effort to remain neutral, both in terms of refraining from comments like the one above, but also but repeatedly making sure that the actors were aware that I was “no one’s guy”, but rather a researcher pre-occupied with understanding their practice as it unfolds, rather than making value judgments about

what works well, what does not, who is right and who is not. Throughout the remained of my field research I have repeatedly mentioned this to the actors.

Remaining neutral is indeed not easy, especially not in situations, where I have felt that I could contribute to the benefit of not just one party, but to the benefit of the outsourcing engagement. I have done my best to refrain from interfering, but nevertheless found it appropriate on some occasions. One of these occasions was when I accompanied the client-side delegation during their visit at the OMC in Chennai, India. The Ganesh Chaturthi Festival – arguably, the most important Hindu festival in South India – coincided with the visit at the OMC and the vendor-side management had invited the client-side delegation to accompany them to one of the sites for the celebration of this festival. As these sites are extremely crowded during the Ganesh Chaturthi festival the client-side delegation had been advised to leave their belongings in the car. After attending the festivities one of the client-side actors went with one of the vendor-side manager to a mall, where she ended up buying a quite expensive saree, which is a traditional Indian dress. Incidentally, she had moved to the other car to go to the mall, but had forgotten her wallet in the first car and the vendor-side manager offered to pay the saree, which she accepted. The following day she had withdrawn money to pay back, what she had perceived as a loan, but the vendor-side manager refused to take the money and told her that it was his pleasure buying her the saree.

Later that evening I accompanied the client-side delegation for dinner and during that dinner she told her colleagues what had happened. She clearly felt bad about the situation and mentioned several times that she felt bad that he paid for the saree, especially because she speculated that it was a very expensive gift relative to his income. I followed the discussion for a while without saying anything, but it was clear to me that she really felt bad about the situation. Finally, I decided to remedy the situation and I told her, based on my own past experiences working with Indian IT-vendors, that I was convinced that his employer would reimburse him for the saree and

that such gifts are customary. That seemed to ease her mind. But while such an intervention on one side can be regarded as a nice gesture towards her it is arguably also an interference, which affects the interplay between the actors. By interfering I had changed a situation where the client-side actor felt gratitude, bad conscience and perhaps a feeling of “owing him one” by exposing that this is customary and arguably a highly calculative gesture. I had interfered – but given that she felt really bad about the situation, I felt I some sort of moral obligation to do so. In this case the moral obligation towards another person, outweighed the moral obligation to remain neutral. Was it the right choice? I do not know!

Another occasion where remaining neutral has been a dilemma occurred first on February 26th 2013 approximately three weeks after I initiated my observation studies. Throughout my fieldwork I have repeatedly been in similar situations. Thus, this situation is just one example of challenge I have had numerous times. On that particular day an excerpt of my field notes read:

After the meeting [the client-side service manager] asked me what I would do in the particular situation. He enquired about two things: One example is that [the vendor-side change manager] is not clearing up changes in remedy [which is the IT-system that is used for handling incidents and changes to the IT-infrastructure], which means that changes that has been accepted still “hang” in the system. [The client-side service manager] has asked [the vendor-side change manager] repeatedly, he said. One time he asked [the vendor-side change manager] to clear it up and gave five examples. Result was that [the vendor-side change manager] got rid of the five, but nothing else. The other subject we discussed was that [the client-side service manager] does not think that [the vendor-side change manager] is preparing the change meetings well enough. All the stuff that the change manager is supposed to do with regards to making sure that there is an impact analysis and that standard information is provided is not done, according to [the client-side service manager] [...]

What [the client-side service manager] asked me [after the call had ended, but while we were still in the meeting room with other meeting participants] was this: "Thomas, I assume that you know something about this. How do I cope with him? How do I make him understand what he has to do?" I was a bit surprised about his question, as he had not approached me like this before. And I did not want to give a too in-depth and concrete answer, in order to keep a distance, to avoid "doing consulting". I explained that based on my experience getting offshore consultants to be proactive is often difficult, as they are not trained that way; many are used to following orders and that's it. Both [the vendor-side Danish service manager] and [the client-side service manager] found this to be a good word: 'Proactive'. I suggested that instead of writing emails with specific items that should be removed he should instead take steps to implement a process that put's it clear that it is [the vendor-side change manager's] job and that he would be measured on it, for instance by measuring process adherence once a week. They both found this to be a good idea and agreed that [the vendor-side Danish service manager] would be in charge of implement such a process.

With regards to the other problem – the perception that [the vendor-side change manager] does not prepare well before the meetings – I suggested that it may be because he is not aware that it her job and what they expect of him; or that it may be because he does not have the legitimacy among the technicians to tell them that they need to make impact analysis and so on. [The client-side service manager] said that it is a "standard ITIL thing". He is very much using a rationalistic approach ("read the ITIL framework and you know it's your job") and my explanation about legitimacy seemed to be wasted on him. (Field Notes 20130226)

The above excerpts serves as an example of a situation I have been in numerous times during the course of my fieldwork, where actors from both organizational entities ask me about advice or insights. In some instances it has been easy to reject answering, namely when actors ask about insights directly related to my fieldwork. In such instances I have merely pointed to the confidentiality between researcher and informant and told that I never share such details with other actors. That has in every

single case been accepted and understood. But in cases where I am asked about advice based on my prior professional experience in working with and managing offshore teams it is more difficult to refuse to answer – after all *there is no such thing as a free lunch*: I early on assessed that if I wanted to keep and expand the privileged access I had in both organizations I also needed to give something back.

During the initial talks with my contact persons at the two organizations I agreed to conducting meetings and giving presentations, where I would disclose practical implications to the involved parties; and I have done so on a number of occasions. But one thing is to disseminate observations and analytical results to senior managers; another is to establish a relationship with “people on the ground”, who during my fieldwork took a great interest in discussing the challenges they met when collaborating across organizational boundaries, time zones, national borders and large geographical distances on both an abstract level as well as a very concrete, situated level. I assessed that ‘giving back’ to a large extent was about contributing as a conversation partner and to some extent as an advisor in the everyday-settings. Consequently, I needed to strike a balance where I on one am being open to helping them out but on the other side am making sure not to become some sort of a management consultant. I found that balance in always being open to listen to their questions and offer my immediate response based on my own practical experiences; and always explicitly stating that my responses were based on *my own experiences from my prior jobs* and never engaging further in these challenges than an immediate, verbal response. This sort of contribution furthermore had the positive side-effect that I could ask even more in-depth questions as they were clearly willing to spend a lot of time chatting with me in office as long as they felt that they got something useful back. To me there seems to be a trade-off between remaining completely neutral and getting the access that any researcher doing anthropological field studies is probably yearning for; and there is no doubt in my mind that had I refrained from giving back to the

actors the way I did, I would not have had the open access and confidentiality of the actors that I had – *quid pro quo*.

Text, Dialogue and Sub-interpretations

“What is interpreted is not ‘facts’ or ‘data’, but text. The text can be literal, consisting of written or spoken words. It can also be figurative; in that social acts are regarded as meaningful symbols, taking the text as model (...) Facts emerge from the text via a process of interpretation. They are results, not points of departure. Thus, we see parts of the text as something, or more precisely as – in some sense – meaningful signs, whether we are reading a text written in letters of the alphabet or in social acts.” (Alvesson & Sköldberg 2009: 61)

Traditionally hermeneutists have been occupied with interpretation of actual texts. However, as the Alvesson & Sköldberg quote above suggests the term *text* can also be understood in a broader way, namely as written texts as well as both spoken words and social actions. Also, it is worth noting that Alvesson & Sköldberg considers facts as the *outcome* of text interpretation and not as the *input*. This underpins the *existential hermeneutical position* very well: Texts – literal as well as enacted – are subjects to interpretation and thus they do not have inherent *meaning*. The outcome of such interpretation is facts, but not universal or objective facts; rather they are subjective. In order to make sense of texts and produce credible interpretations Alvesson & Sköldberg (2009) stresses that hermeneutists need to engage and “use the procedure of asking questions to the text, and listening to it, in a dialogic form” (p. 62). This approach is fundamentally different from both a positivist approach and from grounded theory insofar hermeneutists “neither take a monologist stance similar to that of positivism, nor do they proceed via a passive reception of the text as in grounded theory” (ibid.)

In line with the hermeneutical tradition, where understanding is obtained on the basis of one's own pre-understanding's meeting with a new text I have used both the informal conversations as well as the formalized interviews to test sub-interpretations, understood as the continual formulations of understanding that emerge during the process of interpretation (Alvesson & Sköldberg, 2009). That is, whenever I have arrived at an interpretation of a specific situation I have sought to triangulate the interpretation, by applying *data triangulation* (Denzin, 1978) to elaborate my understanding by getting the perspective of other actors as well as *methodological triangulation* (Denzin, 1978) to substantiate, reject or refine my understanding by using other methods. That is, the sub-interpretations derived from observation are triangulated by the use of document analysis and interviews and vice versa.

The purpose of such triangulation is not based on a logic of validation, but rather on a logic of *argumentation* (Madison, 1988). That is, the purpose has never been to obtain a uniform account of specific incidents, but rather to understand – and acknowledge – how different actors employ different sensemaking to specific situations. Throughout my fieldwork, I have aimed at engaging with a broad variety of actors, acknowledging that organizations are indeed “collective storytelling system[s] (Hazen, 1993: 15) in order to merely rely on formalized interviews, where I am not only likely to “miss the more intimate sounds of people speaking, singing, or crying out to one another” (Hazen, 1993: 16) but I would also be confined to develop my understanding on the basis of retrospective interview data.

Hazen (1993) emphasizes that if “we hear (or read) only loud, articulate, respectable, or directive voices, we confine our possibilities, limit our range, zero in on only one goal, forfeit chances of individual and collective development” (p. 16) and thus, participant observation not only gives a broader perspective, a polyphony, but, in a sense, also contributes to workplace democratization, by giving voice to the silent. One can of course see this as an objective in itself, but even if one does not, I maintain that

Hazen (1993) is right in saying: “When we listen to polyphonic organization, we hear harmony, dissonance, clash, counterpoint, silence, complex rhythms” (p. 22). Not only does this make way for a richer and more nuanced research output to the benefit of scholars, it can also provide valuable insights for the industrial partners, who may often pay too little attention to the more silent people in their organization. Thus, in the analytical chapters I have strived to give voice to both the loud actors, but also to the more silent one’s in order to provide analytical conclusions that are as elaborate as possible. I have aimed at engaging in a dialogue with broad range of actors from the polyphonic organizations to develop my understanding of the texts (being actual texts, observations, conversations or formal interviews) and hereby challenging my own sub-interpretations to a point where I believe I have captured the logics of argumentation from all involved parties; and I have subsequently made my best effort to let all such voices be heard in my analysis.

CHAPTER IV: SETTING THE SCENE

Introducing the Industrial Partners

The collaboration between HCL and Berlingske Media constitutes the empirical foundation for this dissertation. In this chapter I will therefore introduce the two industrial partners. I will do so by outlining the history and markets of the two organizations, by describing the physical locations in Copenhagen and in Chennai, where the respective actors are located, and by elaborating on the nature of the client-vendor collaboration. I will do so in order to establish a foundation for the remainder of the dissertation. However, this initial presentation of the empirical settings will be at a somewhat high level. More detailed descriptions will be introduced in the analytical chapters, when they are needed.

HCL Technologies

History and Market Position

The company history starts in 1976 when Hindustan Computer Limited was founded by Shiv Nayar as a *barsaati* – the Hindi word for a garage start-up – focused on the IT hardware market in India. During the first 15 years HCL was almost entirely focused on hardware development with only little activity outside the borders of India. Inspired by the first wave of IT outsourcing to India in the late eighties (Nayar, 2010), HCL Technologies was established in 1991 to tap into the rapidly growing IT services industry. Under the umbrella of HCL Enterprises, HCL Technologies and HCL Infosystems are now individually listed on the Indian stock exchange. In terms of both revenue and staff HCL Technologies is significantly bigger than HCL Infosystems and is now contributing with 5,26 billion USD, which is approximately two-third of HCL

Enterprises' total revenue. HCL Technologies are and employing more than 95.000 people worldwide (HCL, 2014).²

HCL is currently the fourth largest Indian IT company only surpassed by Tata Consulting Services with more than 300.000 employees and revenues in 2013 grossing 14,44 billion USD (Tata Consultancy Services, 2014), Infosys with approximately 175.000 employees and a 2011 revenue of 8,24 billion USD (Infosys, 2014) and Wipro with 150.000 employees and a 2011 revenue of 7,3 billion USD (Wipro, 2014). Much in line with their biggest competitors named above, HCL's business is mainly focused on providing outsourcing services within engineering, IT development and application services, IT infrastructure operations and application management as well as various kinds of business consulting including business process outsourcing (BPO) and knowledge process outsourcing (KPO).

The industry for providing outsourced IT services has indeed grown tremendously over the latter years. In the case of HCL the number of employees has been tripled since 2005 and the yearly revenue is now six fold of what it was just seven years ago. When Vineet Nayar took over as CEO in 2006 HCL had a compound annual growth rate (CAGR) of thirty per cent. Indeed in many industries this would be an impressive number, but not within this particular industry. Nayar explains the situation as it was in the spring of 2005:

"I just knew that our company, HCL, was in a tough spot and that we had to do something fast or we were in danger of being out of the race all together. I had been the head of the company for only a short time and was still trying to grasp what it meant to lead such a large enterprise (...) the company had

² This dissertation is only occupied with HCL Technologies. However, as HCL Technologies are known in the industry merely as 'HCL' I will use the same acronym. Thus, when referring to HCL Technologies, I will do so by the acronym HCL and when I refer to HCL Enterprises I will write this in full.

thirty thousand employees, operations in eighteen countries, yearly revenue of about \$700 million, and a healthy compound annual growth rate (CAGR) of about 30 percent over the previous five years. But behind these fairly impressive numbers lay a difficult reality (...) Once one of India's corporate stars, HCL was growing more slowly than the market leader in its industry (a company which had achieved a 50 percent CAGR over the last five years) and slower than its immediate rivals, losing market share and falling behind in mindshare, too." (Nayar, 2010: 3)

During the 1990's HCL had established themselves as the market leader in India, they were "the leader of the race, holding the number one position ahead of its Indian peers" (Nayar, 2010: 4), but in the years from 2000 to 2005 this had changed: Several competitors experienced better growth rates and was literally racing past HCL. Nayar speculated that "perhaps we felt satisfied with the growth we had accomplished. Perhaps we believed we were doing the best we could do. Perhaps we were offering the wrong mix of services for the changed marketplace" (Nayar, 2010: 4). Ultimately the declining market share led to a commitment to change, which Nayar elaborates on in his autobiographical account entitled *'Employees First, Customers Second – turning conventional management upside down'* of his years as CEO of HCL. Today, HCL has a stable position as the fourth biggest IT-service provider in India and they have a substantial footprint in the global industry for IT-outsourcing.

Company-internal Trust from the CEO's Perspective

Before commencing into an empirical description of the client's organization I believe that the abovementioned autobiographical record (Nayar, 2010) deserves a bit of attention for one particular reason: It is all about trust! The objective of the abovementioned commitment to change was to "turn conventional management upside down by putting employees first" (Nayar 2010: 16) as Nayar puts it, which – according to Nayar – requires trust.

At a so-called 'Blueprint Meeting' during summer of 2005 Nayar presented his thoughts on challenges of HCL and his initial ideas for a future strategy for HCL to the top 100 managers in the company. In his own words it was a bold strategy that suggested dramatic changes in the way HCL would do business and consequently a risky endeavor for the company.

In hindsight, I wonder why I thought they would trust me at all (...) Why should they trust me? Just because I was asking them to? No. That is not a reason to trust anyone, especially in today's world. Employees have distrusted managers since there have been employees and managers, but I was sure the distrust that ran within the organization was deeper than ever before" (Nayar 2010: 59)

At the 'Blueprint Meeting' Vineet Nayar was met with skepticism from the top 100 managers. They did not trust him to be heading such a dramatic change and in that meeting he "realized that our first job would be to build trust throughout the organization" (Nayar 2010: 63). And so, the idea for the 'trust through transparency' initiative was allegedly born. Vineet Nayar explains that:

"At HCL, we focused on one specific trust-building action: pushing the envelope of transparency. As we did, we found that most people within the organization know very well what's wrong with a company, sometimes even before management does or, at least, before management is willing to admit it. When you bring this information out into the open and make the challenges public, employees feel included. They start to see that the problems of the company are really their problems, too, not just those of the management. They realize that if management is willing to share important information, even the bad stuff, and encourage open conversation about the facts, its intentions can be trusted. Very quickly, you will start seeing some positive action at the grassroots level even before management can decide

on actions and solutions. Many times, we saw employees start working on problems without being asked to do so.” (Nayar 2010: 10)

At the center of the ‘trust through transparency’ initiative was opening up the window of information, as Nayar puts it, by doing four things: Making financial and project reporting from all the business units available to everybody in HCL; establishing an open online forum where everybody could ask questions to the CEO and the rest of the top management; rethinking performance evaluations completely; and putting focus to how employees could be enabled the best way possible.

To make the reports from the business units available to the whole of HCL essentially meant to grant the whole company access to see how the business units are performing individually and consequently to compare performance across these units. According to Nayar (2010) the idea was that such an initiative would “help build a culture of trust – showing that we had nothing to hide and were willing to share both the good and the bad, just as one would in a strong family” (p. 71), but of course also at the risk of having company internal data leaked outside the HCL premises. In addition, Nayar (2010) explains that “opening the window of information shed a lot of light on the role of the manager. Some found themselves exposed to the glances of the passerby from the streets and canals of the company. People saw that some of the managers were little more than the aggregators and brokers of information. These managers’ entire authority lay in their control of the information. As soon as everyone had access to it, their position might come into question.” (p. 72)

This particular theme, about power distribution and its effect on the levels of trust within the organization, is repeatedly addressed by Nayar in his autobiography and indeed also reflected in the last part of the book’s title, ‘turning conventional management upside down’. Nayar (2010) adds that in a traditional management system the leader holds too much power and this “prevents the organization from becoming democratized and the energy of the employees from being released” (p. 13). By

making financial information, that customarily is only accessible to the head of the business unit and his or her superiors, available to all employees in the organization, Nayar claims that a higher level of trust in the organization will be established; that employees will be more passionate about their job; and elaborates that the “speed of thought, of change, and of implementation gets suffocated by too much hierarchy, whatever it may be.” (Nayar 2010: 163). Vineet Nayar stepped down as CEO of HCL in January 2013 and now acts as a special consultant to the company. However, there is not indication that his legacy on putting employees first is discarded. Rather, it is something that is still mentioned in both company presentations and on their corporate website.

Thus, there are substantial indications that trust is an important construct in the intra-organizational collaborations at HCL – at least by the account of the former CEO. Whether the importance of trust is embedded in practice “on the floor” or rather a strategic discourse aimed at branding the company cannot be inferred. Such an investigation would indeed be interesting. However, it lies beyond the scope of this dissertation, as it is not my ambition to examine trust and trustworthiness within the organizational boundaries of HCL, but rather in an inter-organizational context. In this perspective it is interesting to see if, and how, this agenda of trust through transparency also extends to HCL’s collaboration with their clients – in this particular case, Berlingske Media. Is ‘trust through transparency’ solely a company-internal discourse or does it influence collaboration with clients too? Is transparency also the means to establish trust between the client and the vendor organizations – and their respective employees? Or are other means used to establish trust in the client-vendor relationships?

Berlingske Media

The Company History: 1733-2014

Today Berlingske Media is one of the two leading media groups in Denmark spanning two daily paid nationwide newspapers, both among the top five newspapers in Denmark, as well as ten local newspapers published on a daily or a weekly basis; and three radio station. In addition Berlingske Media owns and operates more than 40 stand-alone web media, such as sweetdeal.dk, bilzonen.dk and netdoktor.dk.

The company was founded almost three hundred years ago, in 1733, when Ernst Henrich Berling established a printing house a couple of blocks from where the Berlingske Media has its headquarters today. In 1749 the first newspaper was printed, just one year before the founder dies. In 1765 the company moves to the current location in Pilestræde, and over the next 150 years Berlingske grows: By 1847 the paper is published twice a day six days a week; in 1914 the first newspaper with photos are published, and in 1916 Berlingske adds another paper to its portfolio: B.T. Up until 1968 Berlingske has, with the exception of a few short periods, been growing ever since the first newspaper was published. But in 1968 the publishing house starts to lose both market share and circulation numbers and by 1982 is has lost its equity and is on the verge of bankruptcy. The company is then taken over by large corporate investors, including A.P. Møller Mærsk and Danske Bank, and the company is no longer in the hands of the Berling family.

Over the last thirty years Berlingske has been expanding by establishing niche publications within sports and culture, by acquiring local newspapers; establishing free-of-charge daily newspapers; and over the last fifteen years by establishing a footprint within online media. Berlingske Media has had many names, and almost too many to mention, over the years. On the streets they are commonly known just as ‘Berlingske’, but over the last decade they have changed names from ‘Berlingske

Tidende' to 'Det Berlingske Officin' and last in 2008 to the current name, 'Berlingske Media'.

Just as the names have changed over the last fifteen years, so has the ownership. In 2000 Berlingske was purchased by Orkla Media in Norway, hereby making Berlingske a part of one of the five largest media conglomerates in the Nordic countries altogether. In 2006 Berlingske was bought by British owned Mecom Group Plc. (from here: Mecom). Mecom also acquired the Dutch media conglomerate Wegener. On June 30th 2014 it was made public that Mecom had sold both Berlingske Media and Wegener to the Belgian media group De Persgroep. The acquisition currently awaits approval from the Dutch competition authorities as well as the Mecom shareholders. The acquisition is expected to be finalized around New Year 2014-15. Today Berlingske Media employs more than 2.300 people and has a net turnover exceeding three billion Danish kroner per year (Berlingske Media 2013)

From In-house IT to Full-Scale Outsourcing to Offshore Outsourcing

In 2007 Berlingske Media engaged in a full-fledged outsourcing of their IT infrastructure, IT operations and IT development. From having more than seventy IT-employees in 2006 they went to having just one in 2007, when they engaged with CSC, one of the largest IT-service providers in Denmark and worldwide. All IT activities – infrastructure, operations and application development – were outsourced to CSC and all IT-employees except one were transferred to the CSC. As customary in such outsourcing engagements the transferred employees were at first charged with the same tasks and responsibilities, but over time they were given other assignments or laid off. Over the following years most of them were given new job responsibilities and the client's IT-activities were thus enrolled in the vendor's delivery model.

The remaining employee in the client's strongly reduced IT-department, the Director of IT-operations, was put in charge of building a new IT-organization in-house with profiles that were proficient in managing and governing outsourced IT. In parallel with

former client-side employees being transferred to new assignments with other clients of CSC, the Director of IT-operations established an in-house IT-department with new employees, who had not experienced “the old days” with in-house IT. Thus, when Berlingske Media in 2011 decided to change to a new vendor, HCL, there were only about twenty employees left, who had been part of the in-house IT department.

When HCL was chosen as the new vendor it was decided that eight of these approximately twenty employees should be transferred from CSC to HCL. By doing so they were also physically moved from CSC’s Danish headquarters and were again working in Berlingske Media’s headquarters in central Copenhagen – a location they had left five years earlier.

When HCL took over as Berlingske Media’s service provider in 2012 the hardware infrastructure was moved to the Netherlands and all operational activities were moved to Chennai in India, except those performed by the eight former client employees and a handful of HCL’s native Indian employees who were deployed onsite on a rotation basis. Berlingske Media’s Operations Management Center (OMC) was established in building 3 in one of HCL’s campuses outside the city center of Chennai. The OMC will be described in greater detail later in this chapter.

The Client-Vendor Collaboration

Offshore Outsourcing

The collaboration between HCL and Berlingske Media can be described as an offshore outsourcing engagement (Contractor et al., 2010) encompassing primarily infrastructure operations and application management. That is, HCL is running the hardware that is being used by Berlingske Media and the vendor is responsible for making sure that the systems, applications and databases that run on this hardware are kept up to date and that smaller changes are implemented. HCL is also responsible for

the networks in Berlingske Media, but end user computing is managed by Berlingske Media.

With regards to applications development, HCL is only to a limited extend involved: Most of the development is done by Berlingske Media in collaboration with their development team in Kiev, and HCL is only involved in application development tied to back-end applications such as Berlingske Media's ERP system.

The offshore outsourcing collaboration is organized such that the contractual agreement specifies certain service levels that are to be met by HCL with regards to for instance response times, online time and resolution time (which I will get back to in Chapter VI: 'Flipping the Switch on Trust and Control', where a variety of service levels are described in greater detail). For these specified services and corresponding service levels HCL receives a fixed sum of money on a monthly basis, insofar they meet these objectives. While there are also certain contractual obligations with regards to staffing it is important to note that Berlingske Media does not as such have any say in whom HCL hires to staff the OMC. Thus, the OMC staff is not handpicked by Berlingske Media, but rather employed by HCL to provide a service to the client.

Organizing

The offshore outsourcing collaboration is organized as follows. On the client side the Berlingske Media internal IT-organization (depicted in Figure 4.1 below) is comprised of sixteen people of which four are dedicated to IT operations and the rest are focused at development, project management and higher-level management, for example the CIO. Berlingske Media has engaged with an outsourcing partner in Ukraine for web and mobile development and with HCL in India for IT-operations, including both infrastructure and application management. The latter cooperation is the sole focus of this dissertation. The OMC employees are essentially interfacing with employees from Berlingske Media in two different ways: In cases where changes to applications managed by the OMC need to be introduced to cater for new web or mobile

development or changed requirements within the client organization, they are interfacing with the client's project managers; and on operational aspects they are connected to the four employees in the IT-operations department – a Director of IT Operations and three Service Managers. These four people have, like the project managers, managerial responsibilities; thus, all “hands-on” work is done at the OMC. Finally, the senior management, given their overall responsibility, also has a stake in the HCL collaboration.

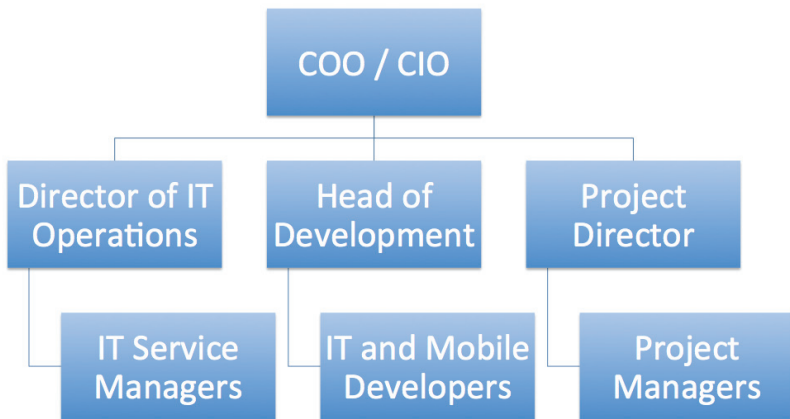


Figure 4.1

At the vendor's premises in India the client has an Operations Management Center (OMC) comprised of approximately eighty HCL employees dedicated to servicing this specific client. As mentioned above, the OMC provides a broad range of services including application management; technical infrastructure; and data center management and is exclusively responsible for all of the client's IT operations. The HCL employees are divided into functional groups, based on technologies such as SAP and Wintel; and on functional areas such as change management, incident management, security and storage. The OMC is organized in these teams, sixteen in total, who each have a team leader. In some teams the team leader is only concerned

with team management, while in other, smaller, teams the team leader is also performing operational tasks.

Depending on the functional areas these team leaders either report to the Service Delivery Manager for Application Development or to the Service Delivery Manager for Operations. The Service Delivery Manager for Operations is also the overall Head of the OMC, and thus the Service Manager for Application Development also reports to the Head of the OMC. Finally, the native Danish HCL employees working out of Copenhagen are all reporting to a Service Manager, who is also native Danish and stationed in Copenhagen, and he reports to the Service Delivery Manager for Application Development. These organizational relations are depicted below in figure 4.2.

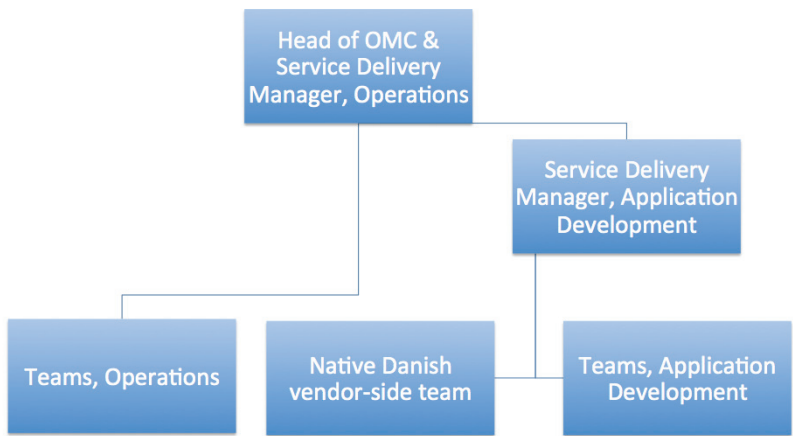


Figure 4.2

Office Descriptions

Berlingske Media – Copenhagen, Denmark

The headquarters of Berlingske Media is located in (the old part of) central Copenhagen. Berlingske has been residing in central Copenhagen since the first

newspaper was published in 1747 and less than twenty years later, in 1765, Berlingske moved to Pilestræde, where the current headquarter is located. Over the years Berlingske has expanded and the headquarters now consists of several buildings build together. The apartment where the Berling family lived is still maintained as a kind of museum. (It is named “De Gamle Stuer” - The Old Rooms).

The IT-department is situated on the third floor - two floors below the canteen that sits on the top of the building complex. This department consists of a total of 24 desks in groups of four. All employees in the IT-department are placed here, including the CIO, who has de-selected an office on the first floor, where the rest of the top management is located. Like all other IT-employees he sits in the open office landscape.

When I first visited the department, I was told that there was free seating, but that the various sub-groups tended to sit close together as this was more convenient. During my first days as a participant observer I discovered that while free seating may be an option, it is rarely used. Mostly people sit at the same desks. Despite this the desks are kept tidy and without any personal artifacts – such as family pictures – as well as paper work. The office is groomed for anyone sitting anywhere. On two of the walls there are cabinets with locks, where all employees can store their items, such as documents and ring binders.

The 24 desks are in groups of four in a rectangular room: At the far end of the room the department head and member of the senior management team with the dual title of Chief Operating Officer (COO) and Chief Information Officer (CIO) sits alongside the Projects Director, who is also the contract responsible with regards to the HCL collaboration responsible for the overall collaboration with HCL. The project managers occupy the next group of tables. Next to this is a group of tables “belonging” to the in-house web-developers; then, the local HCL employees; and finally the IT operations people.

Above the IT operations' group of desks is a large TV screen and a camera. The equipment is for video conferencing and I was told when I enquired on one of my first days as participant observer that the equipment was by? the project managers and the in-house web-developers in order to communicate with their developers in Kiev. The idea was that whenever Danish staff needed to communicate with one or more people in Kiev they could go to that part of the office space and talk using a video system that would be "always on", meaning that there would be a permanently connected video connection between Copenhagen and Kiev. I was told that people found this annoying and eventually it was given up. Now, the IT operations people have occupied the group of tables in front of the equipment, and thus it cannot be used at all by the project managers and web-developers communicating with people in Kiev. No such communication facilities have been introduced to facilitate the collaboration with HCL in India. In the rare events that video meetings are held with vendor-side actors in India they will take place in one of the video-equipped meeting rooms that are in the building (which I will get back to in much greater detail in Chapter V: 'Challenged by Distance').

At the very end of the rectangular office space is a coffee room and a small wardrobe as well as two couches and a low table. The couches are rarely used during the day, but if one goes to the coffee room one can quite often see people having one-on-one meetings or talking on the phone. It seems that the employees usually go here, when they need to talk on the phone. If? the office phone conversations are very rarely observed. And in the cases, where people talk on the phone at their desk it is usually very short conversations, kept at a low volume. Most of the time the office is very quiet, and all you can hear is the sound of fingers touching the keyboards. Especially the mornings are very quiet. Usually a bit more verbal communication is heard across the room after lunchtime.

HCL – Chennai, India

The OMC is located on a HCL campus outside Chennai in the state of Tamil Nadu in India. The area is called Sholinganallur and it is known as an IT industry area, where several of the largest Indian and international IT service providers have campuses. The campus is not more than a few years old and it is HCL's ambition that the campus expands significantly over the next years as they expect to hire more people as well as move employees from other campuses in the Chennai area to this new campus. Currently, the campus consists of six buildings and more than 3500 employees are working there.

Berlingske Media's OMC is located in building five on the third floor. Like all other OMC's for other clients one has to go through the main gate, where access control is performed; through the lobby of the building where a second access control is performed by the means of gates where an access card is required; and finally in order to enter the OMC one has to swipe an access card too. The OMC is essentially one large square room, which can accommodate up to one hundred people. The room is divided into functional areas, which means that employees working together in teams are sitting next to each other. In the corner of the room, two desks are placed a little away from the others. This is where the two OMC managers sit. Much like the Berlingske Media head office in Copenhagen it is very quiet at the OMC. The HCL employees make sure to move close and talk quietly, in order not to disturb their colleagues. Most of the desks have a few personal items and each employee has his or her own desk equipped with landline phone and a computer.

In addition to the large open office, there are two meeting rooms inside the gates of the OMC reserved solely for employees at the OMC. One of these rooms is equipped with both phone conference system and video conferencing equipment, while the other only has phone conferencing equipment. Outside the OMC, at the isles there are several meeting rooms for all purposes, which the employees can book too. Some are only for

physically co-present meetings, while other rooms have state of the art video conferencing equipment and others again have phone conferencing equipment. While it is easy to get lost on the isles in the big building, where all doors look the same, one is never in doubt where one is, when entering the OMC. The room is literally packed with signs and posters from Berlingske Media.

Summing Up and Moving On

In this chapter I have introduced the two industrial partners, whose collaboration is the focus of attention in my ethnographic case study. I have briefly outlined the history of the two companies and their position in the market. I have also touched upon the notion of trust through transparency as formulated by the former CEO of HCL, Vineet Nayar; I have described the outsourcing journey that Berlingske Media started in 2007, and I have briefly sketched the office-layout in Copenhagen and in Denmark. Arguably, technologies available and the use of Information and Communication Technology (ICT) is an integral part of global collaboration. However, it is also a subject I have not devoted much attention to in this chapter, as this is the main topic of Chapter V: ‘Challenged by Distance’, where I focus on communication and collaboration across distance using ICT.

PART II

CHAPTER V: CHALLENGED BY DISTANCE

Introduction

One of the many manifestations of globalization is the increasing tendency for western firms to strategically outsource activities to Asia (Windrum et al., 2009) and throughout the last two decades it has become increasingly popular to engage in offshore outsourcing (Contractor et al., 2010) of IT activities, which the empirical foundation for this dissertation is yet another instance of.

Success in such endeavors dependent significantly on the participants' abilities to work in distributed teams; and a large body of research within several academic fields has been devoted to understanding the inherent complexities of distributed teamwork (see for instance Olson & Olson, 2000; Hambley et al., 2007). Much of this research mentions the importance of trust in virtual teamwork, but without making much of it. On the other hand, there exists a large body of research on trust (Saunders et al., 2010) but within trust research only limited attention has been devoted to virtual collaboration.

In traditional collocated work-environment we easily get to know each other. We eat lunch together; share personal details about our family, interests, vacation; gather for social activities after hours and so on. By simply being collocated we are bound to pick up a lot of contextual knowledge: We know who is present and when they arrived. We know when they leave and we get an impression of whether they are hard working or more easy going. Do they take long lunch breaks or are they grabbing a sandwich at their desks? How many are they talking to over the course of the day? And who? Moreover, we gain insights into our colleagues' moods and we can relatively easy spot if they are happy, angry, sad, tired, stressed out, overworked and so on.

There is an almost endless list of things we can pick up from simply being collocated. All this contextual knowledge happens automatically and for the most part unconsciously. All we need to do is be there. This concept of "just being around" is referred to as *passive face time* by Elsbach et al. (2010).

Kimberly Elsbach and her colleagues (2010) conclude that by *just being around* we tend to spontaneously and unconsciously draw positive conclusions about the character of our colleagues: We assign personal traits such as reliability, dedication, accountability merely based on co-presence. Elsbach et al. (2010) furthermore demonstrate that employees that are not physically present miss out on promotions and salary increases, due to the lack of these spontaneous, positive conclusions. Thus, being the virtual colleague can be quite challenging with regards to establishing a positive impression of one self and the work one performs and additionally damaging to one's career. In a similar vein Hinds & Bailey (2003) conclude: "When trust is missing, team members are more likely to question others' intentions and make attributions that do not adequately account for situational factors" (p. 618) as lack of close proximity is a hindrance to establishment of shared context, familiarity, friendship and homogeneity among the actors.

From quite a different branch of literature the former CEO and Chairman of General Electric Jack Welch assesses that the one's that will be promoted into leadership roles are the ones that are consistently seen and measured as this creates familiarity and trust. Not because they are "stars during every 'crucible' moment at the office" (Welch & Welch, 2007: 92) but rather because they are "present and accounted for. And their presence says: Work is my top priority. I'm committed to this company. I want to lead. And I can" (ibid.) – it appears that the complexities of geographical distribution and its influence on trust is also acknowledged by managerial practitioners.

Thus, it seems that distance indeed matters, as Olson & Olson (2000) concluded in their widely cited article from 2000. However, much has happened since Olson &

Olson did their empirical studies some fifteen years ago. Communication technology has developed and matured drastically and Olson & Olson (2000) were definitely right when assessing the future of collaboration technologies: “Good design and more horsepower in the infrastructure will solve a number of the limitations of current distance technologies. Greater bandwidth will solve the disruptive influence of today’s delays in audio and video transmission. Greater bandwidth will allow for larger, smoother, more life-size displays of remote workers, making their interaction more similar to the flow of proximal interaction” (Olson & Olson, 2000: 143). Today, we have high-quality video meetings with unnoticeable lack, cutting clear and undisrupted audio where groups of people can interact from different location at our disposal. We have video-enabled chat services such as Skype, Microsoft Lync and IBM Sametime. We have a broad variety of web-conferencing software available and it is safe to say that Olson & Olson’s (2000) projection that “advances in technology suggest that with careful human factors in design, there may be technical ways to come closer to some aspects of the face-to-face work” (Olson & Olson, 2000: 143) has come true.

But even though the technical achievements over the past fifteen years are impressive does that mean that it has become easy to collaborate across distance? A vast body of literature (see Berry (2011) for an elaborate review) suggests that technological advancement in it self does not guarantee smooth, frictionless collaboration. Rather, we should – as Ceci & Prencipe (2013) suggest – focus on how we collaborate. That is, we need to pay attention to how do we organize virtual teamwork. Ceci & Prencipe (2013) identify two generic approaches, namely to “(a) decompose activities through the definition of standard and stable interfaces among its components to reduce interdependencies; (b) create opportunity for ongoing communication for actors involved in the pursuit of interdependent activities” (Ceci & Prencipe, 2013: 326). However, as Brusoni et al. (2001) point out, perfect decomposability requires perfect understanding of all interdependencies, which is a rare case. Consequently, actors have

to communicate when collaborating in virtual teams in order to succeed in performing the tasks they are set out to do, which, as emphasized by Hinds & Bailey (2003), is a challenge in distributed teams.

In this chapter I will investigate what the perceived challenges of distributed work are seen from the perspectives of the actors in the client organization as well as the vendor organization. Subsequently, I will enquire into how trustworthiness is established in the collaboration between the actors from the two organizational entities, characterized, for the most part, by physical distance.

Thus, in this chapter I seek to answer the two questions below:

- *What are the perceived challenges of globally distributed collaboration?*
- *How does distance influence the actors' perceptions of their inter-organizational counterpart's trustworthiness?*

In terms of theory, this chapter will draw on the theoretical framework developed in 'Chapter II: Theory on Trust'. Consequently, trust is conceptualized as “a psychological state comprising the intention to accept vulnerability based upon positive expectations of the intentions or behavior of another” (Rousseau et al., 1998: 395). Moreover, “trust in everyday life is a mix of feeling and rational thinking” (Möllering, 2006: 44). Thus, trust has a cognitive and an affective dimension and trust is based on assessments of the trustee's trustworthiness –on assessments of their ability, integrity and benevolence (Möllering, 2006), where ability and integrity relates to the cognitive dimension of trust, and benevolence relates to the affective dimension of trust.

In addition to answering the two above-mentioned research questions I will – based on the empirical findings and the theoretical framework – discuss whether there are unexploited opportunities for advancing trustful relations between the actors from the

two different organizational entities by engaging the concept of active trust (Möllering, 2006).

The progression of this chapter is four-fold: First, to describe the availability and utilization of technology and thus elaborate the empirical description provided in ‘Chapter IV: ‘Setting the Scene’ however, with a specific focus on the role of technology; second, to understand the perceived value of co-location; third, to understanding the perceived challenges of geographically distributed collaboration as perceived by the actors; and fourth, to discuss the possibility to advance trust in the concrete empirical setting. Furthermore, by describing the technologies available and how the actors engage in using technology and by developing an understanding of these challenges this chapter also establishes a foundation that will be used in the subsequent chapters, where I engage in interdisciplinary analysis of trust and control; trust and culture; and trust and boundaries, respectively.

Technology: Availability and Utilization

Technologies Available at the Offices in Copenhagen and Chennai

When entering the IT-department at the client’s headquarters in central Copenhagen one finds oneself in a large shared office, where all IT-employees are seated, including the department head and member of the senior management team with the dual title of Chief Operating Officer (COO) and Chief Information Officer (CIO). The tables are grouped in clusters relating to functions and organizational affiliation. This way the COO/CIO and the Head of IT-operations are sitting together; the client-side IT-service managers are sitting together; the native Danish vendor-side actors is in close proximity with each other; the onsite vendor-side actors ditto. In the same way the client-side project managers and internal developers are grouped in clusters relating to their current project affiliation.

Up until summer 2013 there were free seating in the department. While this was not used in practice – almost everybody was taking the same seat every day, week and month – it meant that the desks were highly impersonalized. No personal artifacts would be on the tables and all work-related paper was put in the employee's lockers at the end of each day. All client-side actors are equipped with laptop computers and company-issued mobile phones and thus, they are not confined by technology to working in a specific location. At the client's headquarters there are also several meeting rooms equipped with video conferencing equipment and additionally a lot of meeting rooms with phone conferencing hardware.

At the Operations Management Center (OMC) in India the vendor-side actors are all located in a large room that can accommodate up to 100 people at the same time. The vendor-side actors are grouped by functions. Each desk is equipped with a landline phone as only the management team has company-issued mobile phones, though quite a lot of vendor-side actors are making themselves available for incoming calls on their personal mobile phones, judging from their email-signatures where their mobile phone numbers are listed. In terms of computers some employees are equipped with laptops while others are working on desktop computers. In general, the OMC managers and team leads as well as other functions, such as change management and incident management, are equipped with laptops, making it possible for them to bring their computer to meetings and to work from home when required, while employees that has a lesser need for mobility are equipped with desktops.

Within the OMC there are two meeting rooms. One is equipped with a phone conference system, whereas the other has equipment for video conferencing as well as hardware for phone conferencing. Additionally, there are several meeting rooms with similar facilities outside the OMC – but at the same floor – which can be booked by the vendor-side actors.

Technology Utilization

The fact that all actors, both client-side and vendor-side, have computers is hardly a surprise. And the fact that all these computers are connected to high-speed corporate Internet connections is probably not a great revelation either. The computer is the central means to communication between the actors – as in so many other organizations. What is interesting is what happens “under the hood” of this vehicle of mediated communication, so to speak.

The computer-mediated communication is essentially four-fold: Email, chat, browser-based software and ad hoc file sharing. In the following I will go through the utilization of each of these types of communication.

Email is king. It can be said that easy! Every single actor I have asked about the primary means of communication vis-à-vis distributed collaboration highlights email as the most used communication tool. There are several reasons why email is the most predominantly used means of communication. First, email is documentation. Several of the actors on both sides highlight this and explain that they see a distinction between for instance phone conversations and emails. One vendor-side actor explain that “I call up the client and ask them for approval, they approve on the phone [and] then I just drop an email stating that as per your approval we’re restarting the server” (Interview #22). By working this way the vendor-side actors have their back covered, so to speak, if there, at any point in time, should arise questions as to why they have acted the way they did. The client-side actors also recognize this dependency on documentation. However, they have a slightly different understanding. While the vendor-side actors express the need for documentation as a proof of acting according to orders and in a timely manner, should something go wrong, the client-side actors believe that the vendor-side actors are using emails to be able to revisit the correspondence in cases of doubt. One client-side actor says:

“Indians like to have everything in writing. [...] I think it may be because they won’t say that they don’t understand it [...] which is why it is best to have everything in writing so they can go back and see what I asked for.”
(Interview #17 – client-side actor)

Secondly, email can help avoid language barriers. Several of the vendor-side actors have told me that they are deliberately using email, because they feel that their client-side counterparts have a hard time understanding the Indian accent, when speaking over the phone. And a few of them explain that they, themselves, face difficulties understanding the Danes in verbal communication. This is supported by some of the client-side actors who also express that they find it difficult to understand the Indian accent, when communicating verbally with their Indian counterparts. Thirdly, several actors from both organizational entities express that there is a mental barrier to contacting people they don’t know from the other organization, which makes it easier to write an email than to pick up the phone.

In addition to emails, chats are also used. With regards to internal communication between vendor-side actors (Danish as well as Indian), their computers are equipped with Microsoft Lync, which is heavily utilized. With regards to interorganizational communication between vendor-side and client-side actors they are using Google Hangout. However, the latter is a very recent development. For the first 18 months of collaboration instant messaging was not possible due to technical and security reasons: The client is to a wide extent using cloud based services including Google’s mail service, Gmail, and hence the use Google’s instant messaging and video-chat service ‘Hangout’ for chats. However, at the vendor organization ‘Hangout’ was not possible due to internal policies on security and Internet-usage. This was changed for the OMC employees post a client visit to the OMC in September 2013. Hence, at this point in time the option to use instant messaging is a fairly new possibility for interorganizational communication between the actors.

Among the vendor-side actors there seems to be general consensus that chatting is a useful and fast way of communicating. However, in the client organization there are divergent opinions on communicating via instant messages: On one hand some share the opinion of the vendor-side actors and on the other hand some clearly state that they prefer not to use instant messengers – “I don’t do stuff like that” as one of the client-side actors puts it (Field Notes 20130226).

Finally, browser-based software and ad hoc file sharing are also essential to the communication between client-side and vendor-side actors. Such tools are used to communicate in a standardized way. For instance, requirements specifications are communicated by the means of document templates; ongoing status reporting is communicated via browser-based interfaces and standing reports are communicated via power point templates. (The role of such artifacts will be analyzed further in Chapter VI: ‘Flipping the Switch on Trust and Control’)

Apart from computer-mediated communication tools, some actors also use phones for on-to-one communications across organizational boundaries. During my observation studies at the client’s headquarters I have listened in on numerous phone calls and it is evident to me that phone calls are by and large only used in two scenarios: In cases of complexity that has surfaced after a longer mail correspondence and in cases of urgency. That is, until a certain issue has either proved to be difficult to handle via emails or if the issue needs immediate attention everything is handled by email or in a few cases by chat. For instance, one of the vendor-side actors, an incident manager, charged with the responsibility of coordinating that incidents and problems reported are resolved according to the service level agreements explain that when critical incidents arise even in the middle of the night she will call her counterpart at Berlingske Media because “The client also feels that if something happening in their environment [...] they want them to be the first people to know that” (Interview #22). However, she also states that even though she is required to call her client-side

counterpart as well as the OMC manager there is a difference: With regards to calling her own manager (the Head of the OMC) she says that “we definitely wake them [up]” (Interview #22), but concerning the client-side counterpart she “really give it a thought whether I should call him or not” (Interview #22). This reluctance to call the client-side actors on the phone is similar for many vendor-side employees, who state that they prefer communicating in writing – even during normal business hours.

When more than two people are included in the communication the actors make use of emails as well as phone and video conferencing. In the cases of phone and video conferencing there are primarily three instances where these are used: Urgent issues, standing meetings and project meetings.

In urgent cases, such as breakdown of business critical systems or services, the parties will typically arrange phone conferences where the vendor-side manager bearing the responsibility for resolving the issue will report to the client-side managers as well as his or her own managers on the progress at agreed intervals, for instance every hour or every two hours depending on the urgency and impact of the issue at hand. Such meetings are also used for coordination – in cases where resolving the issue is dependent on client-side involvement. In cases where this is not the case there will typically only be a single conference call and the remained is status information sent via email at specified intervals. For standing meetings, such as the weekly change board meeting and the monthly service delivery meeting phone conferencing is typically the preferred choice of media. However, after the client delegation’s visit to Chennai in September 2013 this seems to have changed: During the visit the OMC manager showed one of the video conferencing rooms to a selected group of the client-side employees and suggested that they could consider using video for the coming service delivery meetings. This was agreed upon (Field Notes 20130927) – and eventually effectuated.

Interestingly, there was a perception among some client-side actors that video meeting was not possible due to lack of video conferencing facilities at the OMC. One client-side actor explained that “they [the vendor-side actors] don’t have any meeting rooms with video down there, except for a large conference room which they only use on special occasions [...] It [video conferencing] should definitely be utilized more. It gives a better sense of face-time” (Interview #6).

With regards to phone conferencing, I have repeatedly experienced that the audio quality for phone conferences being unstable. Most of the time the connection is quite good, but sometimes it is muffled. In contrast, the quality of the videoconferences is consistently high; the picture is clear, the audio is good and the lightning in the rooms permits good visuals.

Finally, with regards to project meetings video is the preferred medium for project start-up, where a video meeting of the duration of approximately one hour is agreed upon and executed. For the remained of the project’s life meetings are typically held via phones and most communication and coordination is done via emails and chats.

The Perceived Value of Co-location

In terms of the technology available the actors have a wide range of up-to-date communication technologies available at hand on a daily basis: Emails, telephones, instant messengers with the option to have both textual as well as one-on-one video meetings, phone conferencing equipment and video conferencing equipment. All of these technologies work seamlessly except for phone conferencing, which in some cases can have a lower quality. However, even with quite good technology available we are not near the ‘paradise’ that Arthur Mee projected a little more than a century ago.

“If, as it is said to be not unlikely in the near future, the principle of sight is applied to the telephone as well as that of sound, earth will be in truth a

paradise, and distance will lose its enchantment by being abolished altogether.” (Mee, 1898: 345)

Throughout my fieldwork it has been clear that the actors from both organizations value face-to-face interaction with their counterparts immensely. The value of co-location has repeatedly been brought up during interviews and furthermore substantiated by the means of my observation studies, where I have had ample opportunity to observe how the actors repeatedly turn to co-located counterparts – to the familiar faces conveniently present.

Actors from both organizational entities explain that co-location makes communication and collaboration easier. One vendor-side actor claims that being “somewhere near to them [the client-side actors], it is always easy for me to go and interact (Interview #9)”, while another elaborates that it may also be “more effective in a way. That is the reason we have a guy over here [in Denmark] all the time” (Interview #5). A third vendor-side actor with almost fifteen years of experience from various Indian service providers adds that it is a common contractual agreement in all larger IT-outsourcing arrangements he has experienced: “any service provider whatever you’ll do is there is support you from onsite, any industry will make sure there is one guy” (Interview #10).

The notion of co-located work being easier and more convenient is supported by the client-side employees, who find it more convenient to interact “directly with them instead of writing short messages on instant messenger and [sending] emails” (Interview #6) as one puts it.

“What is it that is easier when being colocated?” I ask them. Predominantly the answers are: ‘being available’ and ‘understanding’. The first, ‘being available’ is perceived as a value in itself as eases communication, while the latter, ‘understanding’, is twofold: On one hand it is about the ease of communicating and learning about technical and domain specific issues. On the other hand co-location and face-to-face

interaction are seen as means to gaining understanding of the *people* who from the other organization.

Understanding

“If I am here, we all sit in a room, to make me understand the requirement, it will take only an hour, exactly an hour” (Vendor-side actor, Interview #5)

One of the vendor-side actors tell me that gaining a thorough understanding of a requirement passed on from the client-side to the vendor-side can take several weeks when they are not co-located – something that can be done in an hour when they are. On a similar note one of the client-side actors express that he has a clear preference for apprenticeship as he has experienced positive outcome of that way of passing on knowledge earlier in his career as there is a “greater risk of misunderstanding when communicating in writing compared to when you sit together and can easily ask for clarification” (Interview #6).

This is furthermore supported by the one of the client-side managers in charge of the outsourcing agreements who explains that the initial phase of the cooperation with the vendor consisted of a six month transition period (that ended up lasting more than a year) in which key staff from the vendor was brought onsite for knowledge transfer. Among the client-side actors there is agreement that this transition period has been “vital” for the success of the collaboration and they furthermore point out that such an intense knowledge transfer can only be successful if the vendor-side employees are onsite and “sitting on the lap of our people [the Danish employees]” (Interview #6) as one puts it.

One aspect of understanding relates to the technical and business domain specific knowledge. Another relates to the human aspects, which is brought up repeatedly by the vendor-side actors. One of the vendor-side actors who has been onsite for both the transition and is now again back in Copenhagen explains the value of collocation like

this: “So we are asked to be here and I came to understand how these guys [the client-side actors] work, so I can do a great job now” (Interview #5) and another vendor-side actor elaborates that:

Yes, basically what I do is once I came here I used to observe the people basically, how they talk, how they speak, how they communicate [...] you need to, as a service provider [...] you need to understand them first and then you need to mingle with different kind of people. [...] As a service provider this also is a part of your job getting to know them and their mindset and their culture and then you have to modify yourself a bit and then you need to do your service. So, that he will be happy [and] I will be happy”
(Interview #10 – vendor-side actor)

This notion, that the vendor-side actors, as representatives of the service provider, need to understand the mindset, culture and the way the client side employees work – and subsequently adjust themselves to fit in is very predominant among the vendor-side actors, who uses terms like ‘modify yourself’, ‘adjust’ and ‘mold oneself’ (a subject which I will return to in much greater detail in Chapter VII: ‘Trusting Across Cultures’). The same notion is only to a limited extent found among the client-side actors; a few emphasize the importance of finding common ground and “understand their [the vendor-side actors’] way of working” (Interview #14), but most of the client-side actors have a very process-oriented and technical focus and do not consider the more humanistic perspective explicitly. To them, understanding is primarily related to the subject matter rather than to the human aspect.

Being Available

In addition to ‘understanding’, the notion of ‘being available’ is also repeatedly brought up by the vendor-side actors as an explanation as to why co-location is important. One vendor-side actor explains that being onsite means that he will be the natural contact person for the client-side actors. A senior vendor-side employee with

onsite experience and managerial responsibilities for a smaller group of offshore consultants explains that: “Developing personal relationship is important, but as I said, as a service provider you should have the very, very less response time to make anybody happy” and elaborates that whoever is onsite “will be the go-to guy, of course” (Interview #10) and further elaborates that in order to obtain “effective communication there has to be some physical presence” (Interview #10) and exemplifies that “if there is a critical issue coming like a breakdown happens or a server is down or the internet is down that time obviously it’s a very critical issue that someone is present” (Interview #10).

A part of the explanation for the importance of ‘being there’ refers back to ‘understanding’ namely, that understanding complex matters is easier when being co-located. But another part is referring to ‘being there’ as something that has value in and for itself. Several of the vendor-side actors that are, or has been, onsite explain that they act as intermediaries between the offshore team at the Operations Management Center (OMC) in Chennai and the client-side actors in Copenhagen, in order to smoothen the cooperation: On one side they are the client’s *go-to guys* and on the other side they can act as intermediaries for their colleagues working in the OMC. When the offshore staff members have questions and needs for clarification they are quite often using the onsite vendor-side actors, who are first explained the situation and then they will approach the client-side counterpart on behalf of the OMC.

Likewise, the client-side actors often use the vendor-side actors stationed onsite as intermediaries when they need to bring something up with the offshore vendor-side employees, as “this is much easier than communicating with India” (Interview #6). Mostly, the Indian vendor-side employees stationed onsite are approached with subjects within their work domain. The same applies for the native Danish vendor-side employees, who are repeatedly used as *go-to guys* by the client-side employees and thus acts as intermediaries between the client-side and the offshore vendor-side actors

on subjects relating to their work domain. There is, however, one notable exception, namely the service manager, who has the management responsibility of the rest of native Danish vendor-side employees and act as “the glue” (Field Notes 20130212), as he expresses it himself, between the client-side and the vendor-side actors. His role is, in his own words, to “make the ends of the pipes meet” (Field Notes 20130212) and over the course of my observation studies it has become crystal clear that this is exactly what he is used for. In addition to being involved in a wide range of standing phone meetings with India he is on average called over to one of the client-side actor’s desk and presented with some issue once or twice *per day* during my observation studies. Most of the time he will accept the task and promise to communicate, discuss or raise the issue with the OMC. Being available seems to be not just a part of his job, but virtually his full time occupation.

Judging from the emphasis that actors from both organizations put on co-location it is clear that distance has not lost its enchantment. Despite the fact that the actors have multiple modern and well-functioning technologies at hand distance still matters. Below we shall have a closer look at the concrete challenges they face when collaborating across distance, namely ‘difficulties going directly’, ‘knowledge gaps’ and ‘lacking transparency’.

Communicating at a Distance: Three Challenges

While co-location of the actors from the two organizations results in the actors being available and understanding each other this is not the case when the actors have not had a chance to work in close physical proximity. This lack of exposure to co-location leads to three challenges that will be elaborated below.

Challenge I: Going Directly

During my interviews several people have used the term “putting a face” to the other’s, when asked to elaborate on why it is more cumbersome to collaborate with people they have met face-to-face as opposed to people they have only interacted with via mediated

communication. For instance, one of the client employees explain that “it is important to put face on” as she feels “closer to them – and they feel closer too” (Interview #17). One of the vendor-side employees, and one who performs a role that requires a lot of client interaction, recollects the how the collaboration changed after meeting her client-side counterparts: “I started feeling free to call in for any issues. Before I met them I used to have a fear [...] so after meeting there is a change” (Interview #19).

Another vendor-side employee, also with substantial interaction with some of the client-side employees explains that she used to think: “what are they going to think about me, why is this girl so much pestering” (Interview #22). But after she met with her client-side counterpart, she realized that “he was a really cool guy” (Interview #22) and that meeting in person was “definitely really important. And after he left from here I really did not hesitate to call him for any issues” (Interview #22).

In a similar vein some of the client-side actors have addressed the value of meeting their counterparts. For instance, one client-side actor characterizes an vendor-side actor with whom she is interacting with on a daily basis as a “strict lady, who always goes by the book” (Interview #17) and assesses that “if I had not met her, I would almost not dare writing an email to her. But now that we have met, I think it’s easier” (Interview #17). Thus, the reluctance to approach “faceless” counterparts is similar for a number of actors from the client-side as well as the vendor-side. What they all express, in each their own way, is that the physical face-to-face meeting, even if these are rather short, humanizes their counterparts and makes it easier to make contact directly – that is, by phone. And in cases where they need to communicate with a ‘faceless’ person from the other organizational entity they would do so in writing – either by email or in some cases by chat. As one vendor-side actor puts it: “I don’t know him in person, so rather than talking with him on the phone I prefer messaging on communicator with him” as he is more “comfortable on a communicator” (Interview #22) in such instances.

Thus, the actors perceived a challenge related to ‘going directly’, which is caused by lack of adequate interpersonal interaction. This absence of interpersonal interaction is explained by two factors. First, as elaborated above, there seems to be a mental barrier, which can be overcome by physical proximity. To paraphrase Goffman (1959), one could say that the actors refrain from offering a positive self-image as long as they are communicating using technology and they maintain a depersonalized mode of communication as long as they have not met in person. Consequently, *physical distance becomes mental distance*.

However, the actors also express another dimension of the challenge of the ability to be ‘going directly’ – one that is indeed has a much more pragmatic connotation, but nevertheless is important: The availability of technology. That is, in order to conduct video-based meetings or to have phone conferences meeting rooms has to be booked, which some actors perceived as challenging. As one vendor-side actor puts it these video conferencing facilities “has to be book[ed] and it’s very cumbersome” (Interview #21) as the rooms need to be booked well in advance. Thus, impromptu video meetings are not an option – unless there is an operational crisis, in which case other bookings will be overruled.

This is in stark contrast to the interaction with co-located actors. Another vendor employee explains that: “if it is in our team anytime we can talk to them and we can make them understand what actually we are going to convey. So that thing is very easy here, but whereas with the client we have to schedule a meeting” (Interview #24). Therefore, as he continues: “First we’ll initiate with the mail trails and if this getting continuous mail trails then we’ll go for a meeting” (Interview #24). Thus, emails are the default way of collaborating. At least up to the point where the actors realize that the complexity of the matter inhibits successful collaboration via emails.

To sum up, the actors find it difficult to approach their counterparts from the other organizational entity, when they have not met face-to-face, as encounters in physical

proximity facilitates communication that allow the actors to get to know each other. Furthermore, going directly is a challenge due to scarce technological resources in the form of meeting rooms with video equipment and phone conferencing systems.

Challenge II: Knowledge Gaps

In line with other studies (e.g. Dibbern et al., 2004; Madsen et al., 2013) asymmetric knowledge across the geographical and organizational boundaries poses a significant challenge to the collaboration between the client-side and vendor-side actors in the context of the offshore outsourcing collaboration that constitutes the empirical foundation for this dissertation.

During my observation studies as well as in interviews it has repeatedly been brought to my attention that the client-side actors believe that the vendor-side actors working from offshore lack important knowledge about the client's business and the impact that technological changes and failures have on the business. One of the client-side actors explain:

“Even though we have executed a giant knowledge transfer lasting more than eight months, there is still a lack of overview of what they [the IT-systems] do and how they are interconnected. I don't think anyone has that now, except for myself and a few others in our department [in Denmark]. It is not easy to communicate via these channels. I think there is a big difference” (Client-side actor, Interview #6)

Consequently, he has “given up on getting them [the vendor-side actors] to understand how things are connected” (Interview #6) and he furthermore states that he is repeatedly consulted on things that he had expected that the vendor-side actors would be able to figure out themselves, which he attributes to the distance, as “one has another kind of dialogue when one is sitting next to people and talking directly to them compared to writing short messages on instant messenger or email” (Interview #6).

This point of view is widely shared among the client-side actors, though some express it in a softer tone. On the other hand, several of the vendor-side actors are exclaiming that they see themselves as what Markus (2001) labels *expertise-seeking novices* – as someone who are who are in need of knowledge possessed by others to be able to perform their work – when asked to reflect on the collaboration with the client employees. One vendor-side actor explains: “I do learn from them. So my mistakes will be spoken to me so that I also improve” (Interview #19) and furthermore he assumes that learning is not bi-directional, as the client-side actors do not seem to learn from him or his colleagues. During my interviews and over-the-desk talks with actors from both organizational entities this lack of business understanding has been mentioned repeatedly, whereas the vendor-side actors’ level of technical knowledge is assessed as good. Thus, the knowledge gap is not related to the technical, but rather to the business knowledge.

Interestingly, the notion of lack of business knowledge among the vendor-side actors only apply to the one’s who have not been stationed onsite, in Denmark: One of the vendor-side actors with significant onsite experience explains:

“If anyone sends a mail from the client they [the offshore team in India] will not be understanding the exact criticality of that issue, how the client is facing over there. [...] So the website is down; [...] so they [the offshore team in India] will consider this is as low criticality. So we [the onsite vendor-side actors] need to tell them that the entire Europe is using this. If this website is not working, then it’s the credibility of [the client] and their name is going to lose in the market” (Interview #20 – vendor-side actor)

Furthermore, the vendor-side actors who have been working in close physical proximity with the client-side actors are repeatedly acknowledged for the abilities to understand the core business of the client company during interviews and informal conversations where I was told that “these two guys [onsite vendor-side actors] are

among the best [...] They are really easy to work with and highly intelligent” (Field Notes 20130213); but also during a client visit to India, where the two aforementioned as well as other vendor-side actors working onsite were praised in front of their colleagues for their business knowledge (Field Notes 20130910).

Challenge III: Lack of Transparency

The vendor-side actors who are deployed onsite and thus working in close physical proximity with the client-side actors are also repeatedly praised for their commitment to adding value by following through on the issues that are raised by the client-side actors by “making sure that it actually works” as one client-side actor phrases it. In contrast his experience is that when collaborating with the offshore vendor staff “things are just hidden or ‘forgotten’ if they [the vendor-side actors] don’t know how to solve them” (Interview #16) and sometimes he feels that he cannot be sure if the offshore vendor-side actors take responsibility.

The collaboration between the client-side actors and the onsite vendor-side actors is characterized by ongoing interaction, where the vendor-side actors deployed onsite are very conscious about ‘proving themselves’ both in terms of the quality of work they are doing but also, to a large extent about making sure that all enquiries from the client-side actors are responded to as fast as possible – as one of the vendor-side actor emphasizes: “your service should be effective and your response time should be very quick” (Interview #10).

On the other hand, the interaction between the client-side employees and the offshore vendor-side actors is based on a so-called service management system, Remedy, where status and progress on tasks is communicated. In contrast to collaborating in close physical proximity, where there is an ongoing dialogue about tasks between employees from the two organizational entities, the client-side actors perceive the virtual collaboration as difficult, because “it is sometimes hard to understand why things take so long time – even simple tasks” (Interview #12).

In order to cope with this lack of transparency the client employees have changed the way they specify assignments. One of the client-side employees explains that he used to assign tasks that were abstract, but as that did not work out he now has to “be more specific and split the tasks so they matches the siloes [functional areas]” (Interview #6) in order to make sure that they are completed satisfactory, which he has realized after he has visited the OMC and “seen how they work [...] which makes it easier to understand why things are happening the way they are” (Interview #6)

Thus, one consequence of virtual collaboration mediated by a service management system is that the client-side actors perceive that they lack transparency. That is, until they have had the chance to visit the OMC and gain understanding of how the vendor-side actors work, which they can use to change the way they specify tasks. Another dimension of lack of transparency has to do with the faceless communication, where some of the client-side actors are unsure who are working on the tasks they have submitted in the service management system, which is further complicated because they – as one puts it – “can’t separate one name from the other” (Interview #17) when it comes to working with the offshore vendor-side actors, whose Indian names are difficult to remember for the client-side actors of Danish origin.

Establishing Trustworthiness in Offshore Outsourcing

In this section I will address the second research question, namely: How is trustworthiness established in the collaboration between actors from the two organizational entities? As positive assessments of trustworthiness is a prerequisite for the development of trust, understanding how the three antecedents to trust; ability, integrity and benevolence (see Chapter II: ‘Theory on Trust’) are perceived by the actors from the two organizational entities will provide valuable insights into how trust can be established.

Assessments of Benevolence

Actors from both organizational entities find ‘going directly’ challenging, when they have not had the opportunity to meet their counterparts face-to-face. However, even short face-to-face encounters – such as the client-side actors’ week-long visits to India, where the client-side actors’ face-to-face interaction with individual vendor-side actors is limited to one or two meeting, not lasting more than 45 minutes each, increases the actor’s comfort-level with regards to making direct contact via e.g. phone. This is repeatedly attributed to getting to know each other on a more personal level or, as one vendor-side actors puts it to “understand their characters well” (Interview #20).

In each their way, the actors from both organizational entities all emphasize that meeting their counterparts cater for a more humanized image. As one vendor-side actor recollect about her image of one particular Danish employee – who has a very direct approach and usually talks rather hard, as I have observed repeatedly myself – before meeting him: “I thought he will be somewhat huge. Tall. Intimidating” (Interview #19), whereas he is in fact quite small. Thus, she projects an image of him based on his hard, direct and somewhat confrontational virtual communication style, as being huge and intimidating. After meeting him she “feel[s] free to dial him and dial him anytime if there is an issue. I don’t have second thought” (Interview #19).

Even though no one specifically mentions the word ‘benevolence’ when referring to the change in perception, that happens when meeting face-to-face with their other-organizational counterparts, I argue that this word, benevolence, very well describes the change in perception that physical proximity leads to.

While the collaboration among actors who have met in person is characterized by positive assessments of benevolence the same is not the case for actors who have not met face-to-face. In this scenario the collaboration is characterized primarily by the absence of assessments of the counterpart’s benevolence.

It is important to stress the distinction between negative assessments of benevolence and the absence of such assessments: I have not observed a single incident where an actor has expressed that virtual communication has led to negative assessments. Rather, it seems that in cases where the actors have not met physically they refrain from assessing their counterpart's benevolence; and as a consequence they refrain from engaging in 'direct' communication, such as talking on the phone. Thus, it seems that when positive assessments of benevolence is missing, the actors act as if they had assessed benevolence negatively.

Assessments of Ability

With regards to ability, we have seen how vendor-side actors with onsite experience are praised for their ability to understand the client's business and use this to provide high quality in their work. Seen from the client-side actors' perspective the vendor-side actors with onsite experience are considered both technically savvy and knowledgeable about the client's business environment.

Thus, on one hand, the client-side actors assess the abilities of the vendor-side actors they have been collaborating with in close physical proximity for period of time on the grounds of their perceived business understanding and in a more "holistic" manner. That is, their abilities are subjectively assessed as the perceived quality of their individual contributions. This stands in contrast to the assessment of the abilities of the vendor-side actors with whom the client-side actors have not collaborated with in physical proximity: These actors are not individually assessed, but rather assessed as a part of the functional group they belong to and based on performance measurements derived from the monthly reporting as well as reports from the service management system. In some cases, systems have been running smoothly for a long period of time. This is reflected in the reporting and during the client's visit to the OMC such teams are praised for doing a good and competent job. Other teams, that cannot display equally good results, are questioned in terms of their abilities. These are the teams that

are referred to when a client-side actor says that “there is still a lack of overview” (Interview #12) despite a huge effort in transferring knowledge throughout the transition period.

On the other hand, the abilities of the client-side actors are assessed quite similar by the vendor-side actors who have had a chance to work in Denmark and the ones who have solely been working from India: Actors from both sub-groups acknowledge the client-side actors’ business knowledge and in a similar vein they position themselves as expertise-seeking novices (Markus, 2001), who early in the collaboration are dependent on the client-side actors to understand the business. Though, the client-side actors’ business knowledge is never challenged by the vendor-side actors it is worth noticing that the vendor-side actors with onsite experience express a level of reservation when it comes to readily accepting the needs and requirements expressed by their client-side counterparts. Whereas the vendor-side actors who have not been exposed to collaboration in physical proximity with their client-side counterparts seems to accept the business knowledge of the client-side actors without any hesitation, the group of vendor-side actors who are – or has been – working in Denmark are more reluctant and are deliberately challenging their client-side counterparts. As one vendor-side actor says: “when you get requirements you have to be sure that he is absolutely sure about the requirement” (Interview #05). This suggests that that the vendor-side actors with onsite experience are comfortable questioning their client-side counterparts, which corresponds very well to the positive assessment of benevolence.

Assessments of Integrity

Finally, with regards to integrity, we have seen how client-side actors are counting on the vendor-side actors who are deployed onsite to “making sure that it actually works” and how the vendor-side actors working from onsite manage to prove themselves and as a consequence are given the freedom to plan their work without having to justify how they spend their time in detail. On the other hand, the lack of transparency, as seen

from the perspective of the client-side actors, lead the client-side actors to question the integrity of the offshore vendor-side actors. However, this only applies to offshore vendor-side actors who have not had exposure to working onsite – vendor-side actors returning to India after an onsite allocation continue to enjoy positive assessments of their integrity. From the perspective of the client-side actors they experience that the offshore vendor-side actors without onsite experience do not take responsibility. Thus, the client-side actors assess the onsite vendor-side actors' integrity positively and the offshore vendor employees negatively.

On the other side the vendor-side actors draw positive conclusions about the integrity of their Danish counterparts, regardless of having onsite experience or not. This difference, I speculate, may relate to the nature of the collaboration, where the client-side actors are dependent on the vendor to provide solutions that are critical to their business, i.e. the nature of the client-vendor relationship.

Co-location Facilitates Trustworthiness – Distance Inhibits it

As elaborated above the actors perceive co-location as beneficial as it makes 'being available' and 'understanding' easier. However, beyond these immediate values of collocation another benefit of co-location – one that is indeed subtler, more long-term oriented – surfaces: Co-location and face-to-face interaction are catalysts for building trustworthiness.

When the actors are co-located they engage in what Bjørn & Christensen (2011) have labeled relation work. That is, the interaction necessary to establish "technical and social connections that are critical for the everyday interaction within organizations" (Christensen et al., 2014: 2). Through co-located relation work the actor's establish positive assessments of the other's abilities, integrity and benevolence – the antecedents to trust. Interestingly, this relation work has a positive impact on the collaboration that goes beyond the period of time where the actors are co-located; its effect lasts when the actors are no longer working in close physical proximity, when

they are engaging in distributed collaboration. Thus, vendor employees who return to India after onsite deployment still enjoy positive assessments of their ability, integrity and benevolence by their client-side counterparts; collocation facilitates positive assessments of trustworthiness.

On the other hand it seems that distance inhibits positive assessments of trustworthiness. However, while the conclusion about the exposure to co-location is clear cut as it facilitates positive assessments of both ability, integrity and benevolence for the actors from both organizational entities and thus paves the way for trust between the actors, this is not the case when the actors have not met face-to-face. In such cases the client-side employees refrain from assessing the vendor-side actors' abilities on an individual level; they assess integrity negatively when the expected performance criteria are not met; and they refrain from assessing the benevolence, which leads to negative conclusions insofar they are reluctant to approach the employees directly. Thus, the client-side employees do not display any form of positive assessment of trustworthiness of the vendor employees they have not met in person.

The vendor-side employees' also refrain from assessing the client employees' benevolence when they have not met face-to-face, which also result in reluctance to approach their face-less counterparts directly. However, even though the actors have not met in person, the vendor-side employees assess both the ability and the integrity of the client employees positively.

The second research question reads: How is trustworthiness established in the collaboration between actors from the two organizational entities? In this section I have answered this question by investigating first the three challenges that the actors' face when collaborating virtually and afterwards by relating these challenges to the three antecedents to trust, namely ability, integrity and benevolence. The findings are summarized in table 5.1.

	Exposure to Co-location		No Exposure to Co-location	
	Vendor-side assessment of client-side counterparts	Client-side assessment of vendor-side counterparts	Vendor-side assessment of client-side counterparts	Client-side assessment of vendor-side counterparts
Ability	Positive assessment	Positive assessment	Positive assessment	No individual assessment
Integrity	Positive assessment	Positive assessment	Positive assessment	Negative assessment
Benevolence	Positive assessment	Positive assessment	No assessment, negative conclusion	No assessment, negative conclusion

Table 5.1

Noteworthy Differences and Opportunities

What defines a virtual team? On one hand there are teams that are always working in close physical proximity. On the other side there are teams that never meet, where all communication is mediated by technology. Thus, we have a continuum where it is difficult to clearly define when a team is indeed a virtual team.

In the specific empirical settings we are dealing with here we have team members that hardly ever meet. Over the course of the collaboration that has lasted more than one and a half year, they have met once or twice and seldom more than a few hours. It is safe to say that the collaboration between these actors can be characterized as a virtual team structure.

On the other hand we have team members who have been working in close physical proximity for a longer period of time. During the course of time where they are actually co-located, when the vendor-side actors are working at the client-side office in Denmark, the team structure cannot be characterized as virtual. However, we have seen how co-location has a positive effect on the assessments of ability, integrity and benevolence, which lasts even after the actors are not working together in a co-located

environment. That is, when the collaboration structure is changed to a virtual one, the positive assessments stemming from co-location are preserved. Thus, *we can conclude that while trustworthiness is created when the actors are co-located it can be maintained at a distance.*

Noteworthy Differences in the Perceptions of Trustworthiness

With regards to laying a foundation for cognition-based trust we see that the vendor-side employees are assessing the ability and integrity of the client employees positively despite not working with them in a co-located manner. This is not the case for the client-side actors who only assess the vendor-side actors' abilities and integrity positively when they have been working with them in close physical proximity for a period of time. What causes this difference? From the body of literature on trust we know that assessments of ability, integrity and benevolence are dependent on the trustor's propensity to trust; that is, a predisposition (Greenberg et al., 2007) that can be caused by a number of things such as culture (Zaheer & Zaheer, 2006) or macro factors, such as national wealth, income equality and education (Ferrin & Gillespie, 2010). I speculate that two such factors may influence this difference in trust development between the client employees and the vendor employees: First, the vendor employees are working in an IT-industry in India, where more than ninety percent of the employees are delivering outsourcing services to non-Indian companies. This means that the vendor employees are highly accustomed to working in virtual teams with people from the other side of the globe, which gives them an advantage: They are simply used to work with and build rapport and trust with counterparts they have not met.

Secondly, the difference in team sizes may have an influence. That is, on the vendor side approximately eighty people are servicing the client, who are represented by less than ten people that engage with the vendor-side staff – and in practice the vast majority of communication with the vendor-side actors is done by a group of four

client employees. As mentioned in Chapter II: ‘Theory on Trust’ the literature review trust is a psychological state where one is prepared to accept vulnerability and in order to do so one has to take a ‘leap of faith’, where fuzzy uncertainty, as Bachmann (2011) calls it, is transformed into an accepted risk. Given the organizational setup and the team sizes I argue that taking such a leap of faith is easier for the vendor-side employees as they can make use of referral trust (Jøsang, 2011): By the means of a colleague’s trust in a client employee, the vendor employee can more easily establish trust in the specific client employee – the basis for trust is so to say transferred from one vendor employee to another. As the client-side employees are significantly fewer and all vendor-side employees presumably know their names finding a colleague among the vendor employees who is able to vouch for the client-side counterpart in question is undoubtedly easier than finding a colleague among the client-side employees who can vouch for a specific vendor-side employee, knowing that the client-side employees are challenged by the Indian names and “can’t separate one name from the other” (Interview #17) as one of the client employees told me. This furthermore corresponds well with Tsai & Ghoshal’s findings that “individuals who enjoy more central positions within a network are likely to be perceived as more trustworthy” (Quoted in Sarker et al., 2011: 283).

Another noteworthy difference is related to the object of the assessments of trustworthiness and ultimately the objects of trust. When the actors have not met in person these assessments of trustworthiness are aimed at the collective, while assessments of actors whom one has met *in person* are aimed at the individual level. That is, physical co-presence seems to impact the object of trustworthiness. The dynamics of trustworthiness as being aimed at an interpersonal level versus a collective level will be investigated in much further detail in Chapter VII: ‘Trusting Across Cultures’.

Opportunities for advancing trustful relations

In the analysis above I have answered the two research questions. For the remainder of this chapter I will discuss an avenue for unexploited opportunities for advancing trustful relations between the actors from the two organizational entities. Arguably, perceptions of trustworthiness are established simply by the means of co-location itself. However, establishing trust in virtual teams is by no means a trivial matter. Berry (2013) concludes that “[c]reating trust between coworkers and between employees and managers may be the greatest challenge in building successful virtual teams” (p. 10) But does this mean that trust cannot be created in such scenarios?

In the case that constitutes the empirical foundation for this dissertation we see that developing rapport and positive assessments of trustworthiness is in fact achievable, when the actors are co-located. The question is whether this can be done without physical co-presence as well? I argue that there are two barriers to this. One has to do with availability of ICT (Information and Communication Technology) and the other has to do with technology utilization.

First, with regards to availability of ICT the challenge is not the quality of the technologies, but rather the fact that video conferencing facilities are not instantly available (as elaborated in ‘Challenge I: Going directly’) Thus, impromptu video meetings are not an option, which is in stark contrast to the interaction with co-located actors, where one can easily move to another person’s desk or office to talk. One can, of course, claim that there are other means of ‘going directly’ and thus paving the way for positive assessments of benevolence, such as instant messengers or phones. However, this leads us to the second barrier: technology utilization.

In quite a few interviews – sixteen to be specific – I have asked what the difference between meeting one another in person and communicating via video, phone or chat. The actors all agree that there is a difference as “virtual meetings are more straight to the point” (Interview #6) as one puts it. The actors report that there is no small talk

before or after meetings. Thus, the way the actors interact when using technology is substantially different from interacting face-to-face. Additionally, some are reluctant to use the technologies available. For instance one of the client employees exclaim that “I don’t do stuff like that” (Field Notes 20130226) when I ask him if he is communicating via instant messengers.

In order to advance positive assessments of trustworthiness in the specific context of this virtual collaboration the actors cannot depend on what Child & Möllering (2003) calls contextual confidence, as this is weak. Contextual confidence is, as elaborated in Chapter II: ‘Theory on Trust’ a state where the trustor is a passive figure who based on contextual information can assess whether to trust another or not. Elsbach et al. (2010) signify that assessments of personal traits is an unavoidable characteristic of co-location as there mere co-presence will prompt humans to evaluate each other and that such co-presence will for the most lead to assessments that are more positive than if the individuals were not co-located. This way contextual information will likely lead to positive assessments and create contextual confidence.

Arguably, contextual information passed on via co-location can lead to mutual trust by following a *principle of gradualness*, where the actors gradually approach each other and by continuously gathering contextual information about each other they can continuously develop a higher level of trust. That is, the *risky* business of trusting is gradually expanded in a speed that is proportional with the gathering of contextual confidence. The same principle of gradualness cannot readily be applied in geographically distributed teams as contextual information is only to a very limited extend increased between interactions. In such distributed teams contextual information is only scarcely available as the actors are not absorbing information about each other continuously, but only when they – more or less often – actively interact with the virtual counterpart. Thus, in order to develop a foundation for trust actors need to actively engage in trust building by – as Child & Möllering (2003) would put it –

applying *active trust*. However, active trust development in virtual teams requires that technology is readily available and used; and that they actively seek to compensate for the lack of contextual information by imitating the form of dialogue that occurs when they are co-located. As Möllering (2006) reminds us such active trust requires that the actors continuously engage in intensive communication and furthermore requires openness.

How can this be done? I believe there is ample opportunity. One technique is to raise awareness of each other's presence by imitating how the co-located team members greet each other when they arrive at the office, when they break for lunch and when they leave again at night. In the co-located environment they walk through the open office and with a few words or gestures they signal their presence to their colleagues. This can be imitated by actively engaging with remote actors in the same situations, by a simple 'hi', 'good morning' or 'goodbye' conveyed through instant messenger. I speculate, that this would eventually lead to a situation where a short greeting on the way in or out of office would remind the actors of something that needs to be discussed, just as it happens between co-located actors when one sees another on the move in or out of the office. In other words, it would improve the ability to be 'going directly' in virtual teams. Furthermore, such greetings would improve transparency as to the availability of remote counterparts.

There are several other techniques, such as leaving webcams and sound on for a longer period of time without necessarily having to speak to each other all the time or booking calendar time, where it is agreed that remote colleagues have first priority and can make contact at any point in time. Such techniques also aid help the actors to be going directly and increases transparency by the means of active trust building. Undoubtedly, such techniques will feel odd in the beginning. Some will work and some will not. However, in order to advance trustful relations in virtual teams we need to, somehow, engage in active trust building that may challenge our habitual way of collaborating

and I argue that this can be done by seeking to imitate the way collaboration is done in co-located teams as this would help expand and refine the contextual information about the other's.

Concluding Remarks

The aim of this chapter has been to answer two research questions, namely (a) What are the perceived challenges of globally distributed collaboration? and (b) How does distance influence the actors' perceptions of their inter-organizational counterpart's trustworthiness?

We have seen that the actors perceive difficulties in 'going directly' when they are not co-located; and how geographical distribution creates knowledge gaps and lack of transparency. Furthermore, I have argued how this leads to a situation where mutual trust can be created only when the actors are co-located. However, I have also argued that the vendor-side employees are assessing their client-side counterparts' abilities and integrity positively, even when not being co-located and I have suggested that this may be explained by them being more used to work in virtual teams due to the characteristics of the IT industry in India; and furthermore that referral trust (Jøsang, 2011) may contribute positively to the positive assessments of trustworthiness.

With regards to the client-side actors' assessments of vendor-side actors whom they are not, and have not been, working with in a co-located manner I have shown how they refrain from assessing their counterparts' ability. The same is the case for assessments of benevolence: In this case neither client-side actors nor vendor-side actors assess their counterpart. Within the trust literature assessments of the three antecedents to trust are habitually treated as either positive or negative and to my knowledge the consequence of absence of assessments have not been considered. In the empirical context of this dissertation I have shown that absence of assessments of benevolence leads to negative conclusions. One can speculate whether this is a result of propensity to trust among the actors or a generally applicable conclusion that

inability to assess another's benevolence will cause negative conclusions; this is something I believe is worthwhile studying within the community of trust scholars.

Finally, I have, in the discussion, argued that in order to advance trustful relations in virtual collaboration the actors are dependent on technology being readily available but also on engaging in *active trust* building (Child & Möllering, 2003), by actively imitating the way they communicate face-to-face, when they are collaborating virtually. Consequently, practitioners facing the challenges of working in a geographically distributed environment cannot rely on development of trustworthiness to happen automatically. Rather, they must cater for establishing a foundation for a trusting inter-organizational and inter-locational work environment. The analytical findings in the chapter suggests that this can be done by facilitating the possibility for the actors to work in a co-located environment for a period of time, as co-location has a positive impact that exceeds the period of time where the actors are co-located. However, as I have suggested, a foundation for a trusting work environment can also be catered for while the actors are not co-located by ongoing use of synchronous communication via ICT, which can be used to engage in active trust building.

As stated in the introduction to this chapter the ambition of this chapter has been to answer two fundamental research questions, but also to lay the grounds for the following analytical chapters by presenting a wide range of empirical observations. Throughout this chapter the focus has been on the "distance issue"; on how co-location and face-to-face interaction is perceived valuable; and how the actors are challenged by geographical distribution. While focusing on 'distance' however, three other themes have surfaced: First, I have shown that when the client-side actors are not working with vendor-side actors in a co-located manner or with vendor-side actors with whom they have had significant face-to-face exposure to they rely significantly on standardized information mediated through templates and web-based tools. This topic will be explored further in the next chapter 'Flipping the Switch on Trust and Control' where I

will put attention to the relationship between assessments of trustworthiness aimed at the individual level and formalized assessments of performance by analyzing how control mechanisms are used in the collaboration between client and vendor and how this influences the possibility to establish trustworthiness. Secondly, this chapter has focused on ‘distance’ in itself. In Chapter VII: ‘Trusting Across Cultures’ I will dive deeper into the formations of groups as these are indeed more complex than merely being a question of geographical separation. This chapter will, in other words, take a closer look at how assessments of trustworthiness unfold at a collective level. This is important given the findings in this chapter, which suggests that when the actors are distributed and have not met in person, assessments of trustworthiness is not done at an interpersonal level, but rather at a collective level. Third, the importance of boundary spanners will be the topic of Chapter VIII: ‘Spanning the Trustworthiness Boundary’ as these intermediaries play an important role when it comes to establishing positive assessments across cultural groupings.

CHAPTER VI: FLIPPING THE SWITCH ON TRUST AND CONTROL

Introduction

According to Mellewigt et al. (2007) “trust is often argued to be the glue that keeps the partners of IORs [interorganizational relationships] together” (p. 837). Throughout the previous chapter we have seen how the actors from the two organizational entities that mutually perceive each other as trustworthy are in fact much more glued together than the ones that do not exhibit such indications of mutual trustworthiness. By the means of positive assessments of trustworthiness the actors are able to interact directly in an unproblematic fashion and they perceive their collaboration and the other’s actions as transparent.

From Rousseau et al. (1998) we know that to trust inherently involves taking a risk. Without risk, it simply does not make sense to talk about trust. And we know trusting behavior – and the inevitable risk taking that comes along – can facilitate increased trust, insofar one’s trust is honored by trustworthy behavior by the trustee. However, as Das & Teng (1998) remind us: “Although risk taking breeds trust, firms do not blindly take unjustified risk in the hope of developing a trustful relationship. (p. 504). Arguably, an IOR, such as the one between the two organizational entities, is somewhat paradoxical as each organization are pursuing their own interests, but at the same time they are to a certain extent required to refrain from pursuing their interests in order to make the IOR work. The balance between pursuing own interests and making the partnership work is a risk that both actors incur. Thus, contracts are written and signed in order to avoid such unjustified risks.

DiMaggio (1988) remarks that “the compelling nature of contractual agreements is widely acknowledged, even by actors who might be better served by breaking them and even in the absence of a credible threat of legal retribution” (p. 6) and thus, just as

any other offshore outsourcing engagement, the collaboration between the two organizations is, of course, also based on a written contract. In the words of Mellewigt et al. (2007) “there are two reasons why partners in IORs draw up formal contracts: control and coordination. Control can be conceptualized as a process to bring about adherence to a desired outcome through the exercise of authority or power mechanisms, the purpose being to minimize idiosyncratic and deviant behavior, as well as to hold parties to articulated policy. Coordination can be seen more as an enabling process to attain a desired outcome, the purpose being to provide the appropriate linkages between two different and interdependent task units” (p. 834). In other words, a contractual agreement on one hand provides control as it specifies the obligations of the two parties as well as the remedies and financial penalties associated with breach of these obligations; and on the other hand the contractual agreement provides an outline of how the parties are expected to collaborate.

In the previous chapter I have investigated how trust is established between the actors from the two organizational entities, but I have done so without taking the contractual underpinning into account and without paying attention to the role of control. Arguably, control exists in all kinds of organizational work and not merely in IOR’s, but in IOR’s, such as the one I am engaging with in this dissertation, the contractual underpinning is arguably significant as such a contract introduces legal restrictions and financial as well as legal consequences, in case the contractual obligations are not met. Thus, when analyzing control in an IOR we must always keep in mind that the controls do not stand alone. Rather, they are practical instances for monitoring contractual agreements.

However, though the contractual agreement has impact on the way control is performed this does not mean that control is merely a pragmatic solution to monitoring contractual agreements. Control is much more than this, which I will shed light upon throughout this chapter.

According to Möllering (2006) “trust and control are not the two mutually exclusive sides of a dualism but rather are so directly interrelated that they constitute a duality. Trust and control each assume the existence of the other, refer to each other and create each other, but remain irreducible to each other” (p. 194). When Möllering refer to the relationship between trust and control as a *duality* rather than a *dualism*, he signifies that they are mutually dependent on each other to establish positive expectation in a relationship. The notion of a *trust/control duality* will be examined further later.

The focus of this chapter is the interplay between trust and control as it unfolds in the empirical setting, which I am investigating, by acknowledging that these two constructs – trust and control – are interrelated as they are both potential contributors to establishing the level of confidence needed and mitigate risk-perceptions in partner cooperation.

Specifically, the aim of this chapter is to answer these two research questions:

- *How are control mechanisms used in the collaboration between client and vendor?*
- *How does the use of control mechanisms affect client-side perceptions of the trustworthiness of vendor-side actors?*

Given the nature of the collaboration, where the vendor is delivering services to the client in exchange for money the focus in this chapter will be on how on how the client-side controls the vendor side.

Theoretical Foundation: Understanding the Concept of Control

Control is by no means a new aspect of scholarly work on organizations. Back the 1960's when organizational science was a relatively new discipline Cyert & March (1963) took an interest in understanding how managers sought to align employees' capabilities and performance to the goals and aspirations of the organization; and Blau

& Scott (1962) acknowledged the importance of managers' control of subordinates. But arguably control theory has an even longer history relating back to Weber's notion of bureaucracy in the early nineteenth century (Dunbar & Statler, 2010). Over the years the understanding of the theoretical construct 'control' has changed from being a coercive efficiency-enhancing tool maybe best represented by the 1980' notion of Total Quality Management (TQM) to a construct that captures both the coercive aspect as well as a sensemaking aspect, where control influences and is influenced by culture and identity (Sitkin et al., 2010). Cardinal et al. (2010) explain that:

“Traditionally, researchers have suggested that control mechanisms are either formal or informal based on their position along a single ‘formality’ continuum. [...] However, control researchers [...] have recently suggested that formal and informal represent distinct dimensions and that individual control mechanisms can exhibit both formal or informal attributes”
(Cardinal et al., 2010: 57)

What Cardinal et al. (2010) clarify is that control has a formal side to it as well as an informal, where the formal mechanisms include “a range of officially sanctioned (and usually codified) institutional mechanisms such as written rules and procedural directives” (p. 57) and informal control has do to with values, norms and beliefs that guide employees' actions and behaviors”(ibid.). This perspective is in line with Ouchi's (1977) seminal work on control, where three modes of control are defined: behavior, output and clan, where there first two are formal controls and the last, clan control, is informal.

In their well-cited article Piccoli & Ives (2003) define control “as attempts to ensure that individuals working on organizational projects act in conformity with predefined strategies” (p. 368). That is, control always has the dual objective of checking whether something or someone's actions correspond to what has been planned and to correct deviations from this plan. While I believe this definition adequately describes *formal*

control, I argue that it does not cover the full concept of control, as it fails to take the *informal* aspect into account. Rather, I propose that we define control in the lines of Leifer & Mills (1996), namely as "a regulatory process by which the elements of a system are made more predictable through the establishment of standards in the pursuit of some desired objective or state" (p. 117) as this definition to a larger extent caters for both formal and social/normative control.

When researching the constructs of trust and control in conjunction this distinction between the two forms of control is especially important. Das & Teng point out that "it is necessary to consider formal control and social control for their distinctive implications for trust. Whereas formal control employs codified rules, goals, procedures, and regulations that specify desirable patterns of behavior, social control utilizes organizational values, norms, and cultures to encourage desirable behavior" (p. 501). Formal control on one hand is a "strict evaluation of performance" (ibid.) whereas social control on the other hand according to Das & Teng (1998) "is about dealing with people" (p. 501).

Cardinal et al's. (2010) definition of *informal control*, Ouchi's (1977) notion of *clan control*, as well as Das & Teng's term *social control* bears significant resemblance to Kunda's (1992) concept of *normative control*, defined as "the attempt to elicit and direct the required efforts of members by controlling the underlying experiences, thoughts, and feelings that guide their actions"(p. 11). In Das & Teng's (1998) vocabulary norms, values and culture are intertwined. Arguably, it is difficult, if not impossible to separate these three concepts (Alvesson, 1995), However, for the purpose of establishing an analytical framework that can grasp both the formal and social aspects of control, I argue that it is reasonable to focus on the unwritten rules (norms) and what is perceived as 'good' or 'right' in the given context (values) exclusively, and thus steer clear of the concept of *culture*, which, according to Hatch & Cunliffe (1997) is very ambiguous as it has an infinite number of meanings and

definitions attached to it. Consequently, in this chapter I will adhere to the concept of *normative control* as defined by Kunda (1992). The next chapter will however be devoted entirely to understanding the interplay between trust and culture as it unfolds in the collaboration between the two organizational entities I am researching.

According to Das & Teng (1998) ‘control’ is referred to as “an organizational setup, a process of regulating behaviors and an organizational outcome” simultaneously (p. 493). For the purpose of this chapter I adhere to Das & Teng’s (1998) distinction between ‘control’, ‘control mechanisms’ and ‘level of control’ (Das & Teng, 1998), where control mechanisms refer to the concrete organizational arrangements that are utilized to reach predictability (that is, ‘control’) and level of control refers to “the degree to which one believes that proper behavior of the other party is ensured” (Das & Teng, 1998: 493). Thus, to gain formal control, formal control mechanisms are utilized and to gain normative control, normative control mechanisms are utilized.

Formal Control

According to Weibel (2007) the mechanisms used to gain formal control can be divided into three types: “(a) standard specification; (b) monitoring, evaluation, and feedback, which are designed to inform on organizational standards and individual goal attainments; and (c) sanction and reward mechanisms, which are applied to tie individual incentives to organizational goals” (p. 502). On the other hand Das & Teng (1998) – with inspiration from Aulakh et al. (1997) – divide formal control into two sub-categories, namely ‘output control’ and ‘process control’. Output control is, as the name suggest, has the deliverables from each individual or group – their output – as its objective, whereas process control controls peoples actions under the assumption that a specific behavior will lead to the desired or desirable outcomes. Process control is also referred to as ‘behavior control’ (Piccoli & Ives, 2003). However, I will designate it as ‘process control’ in order to emphasize the difference between on one side controlling how people act in order to do a specific task and on the other side how they act in the

workplace in general. That is, how do they interact with colleagues and behave at work? This relates to normative control, which will be elaborated below.

Thus, there are two different approaches to sub-division of formal control. However, they can very well co-exist: Weibel’s categorizations are evolving around the question on *how* formal control can be obtained, whereas Das & Teng (1998), Aulakh et al. (1997) and Piccoli & Ives (2003) are primarily concerned with *what* is being controlled. Thus, by integrating the two views we can conceive formal control as six different types, as depicted in table 6.1 below.

	Standard Specifications	Monitoring, Evaluation & Feedback	Sanctions & Rewards
Process	Expected work process is specified.	Work process is monitored and evaluated. Feedback is given.	Adherence to work process is rewarded / sanctioned.
Output	Expected work output is specified.	Work output is monitored and evaluated. Feedback is given.	Adherence to output goals is rewarded / sanctioned.

Table 6.1

Normative Control

Where formal control is about setting goals (output control) and making structural specifications (process control) and monitoring adherence; as well as rewarding or sanctioning adherence to these to types of control, by employing “codified rules, goals, procedures, and regulations that specify desirable patterns of behavior” (Das & Teng, 1998: 501) normative control employs a different, and arguably more subtle, set of mechanisms, attempting “to elicit and direct the required efforts of members by

controlling the underlying experiences, thoughts, and feelings that guide their actions”(Kunda, 1992: 11). Thus, normative control is aimed at controlling *workplace behavior*.

As normative control makes use of less tangible mechanisms than formal control it is arguably also more difficult to analyze. I argue, however, that normative control can be scrutinized by Weibel’s (2007) categorization of types of formal control. That is, normative control as a ‘*what*’ can be understood by applying the three categorizations of ‘*how*’ as I did for formal control: standard specification; monitoring, evaluation and feedback; and sanctions and rewards.

First, the organizational values and norms can be regarded as a *standard specification* for workplace behavior (I will argue why it is so later in this chapter, in the section ‘Analyzing Control of Workplace Behavior’). Secondly, the way actors behave in a workplace are indeed monitored, evaluated and given feedback on. Though such monitoring, evaluation and feedback may not necessarily be deliberate and conscious, the literature on *in-group favoritism* (Kanter & Corn, 1994; Marrewijk, 2010) and the resulting *us-versus-them dynamics* (Cramton & Hinds, 2005) suggests that deviations from what one perceives as a standard specification for workplace behavior (i.e. norms and values) are both monitored and evaluated and, thirdly, that this result in rewards for actors who are considered as in-group and sanctions for actors who are considered out-group. Such rewards and sanctions can be financial and oriented towards career progression, but can also be more directly focused at the collaboration (Cramton & Hinds, 2005) in the form of information sharing and joint idea generation (for in-group members) or lack of the same (for out-group members). Thus, I argue that using Weibel’s (2007) categorizations of *how* control is effectuated can provide a novel and nuanced analytical view on normative control.

Below I shall unfold how the three categories (missing verb) and how they relate to formal as well as normative control in more detail.

Framework for Analyzing Formal Control and Workplace Behavior

Analyzing Process Control

Within the IT-industry there has been a significant focus on *process control* for years. Many organizations adhere to the CMMI (Capability Maturity Model Integration) framework developed by Carnegie Mellon University to define and improve process maturity for software development. For instance, all the top-tier IT service providers in India pride themselves of being CMMI level 5 (the highest possible level) organizations and include this process maturity as a central part of their value proposition to customers. Within IT-operations, the ITIL (Information Technology Infrastructure Library) framework has become a standard adopted by organizations worldwide. Additionally, project management certifications such as Prince2, PMP (Project Management Professional) and IPMA (International Project Management Association) are typical requirements in job adverts for project managers within the IT-industry. Thus, there are numerous ways of controlling the process within IT-development and IT-operations.

All of these frameworks and certifications can be regarded as *standard specification* on some level as they define what is commonly referred to as “best practice”. Given the broad application of such frameworks and certifications they all aim at providing guidelines, which to some extent needs to be tailored to the specific organization, team or project. The adherence to the (tailored) standard specifications is *monitored, evaluated and fed back* through the use of standardized control mechanisms, such as standardized assessments and templates; and in the cases of the frameworks (ITIL and CMMI) this is thought of as an iterative process aimed at providing status, “health check” and input for iterations on process improvement initiatives as well as the work itself.

None of the frameworks or certifications suggests how to – or whether or not – the monitored adherence to standard specifications should be rewarded or sanctioned.

Thus, this is entirely up to the organizations employing such framework and/or project management methods. However, it is important to note that there is a significant difference between on one side *feedback* and on the other side *rewards and sanctions*. Whereas feedback is (an attempted) neutral reporting of monitoring and evaluation, rewards and sanctions are the positive or negative consequences of such feedback bestowed upon actors.

Analyzing Output Control

As the collaboration between the two organizations that constitute the empirical foundation for this dissertation is characterized by exchange of services for money, the overall governing mechanism is of course a contract. In complex outsourcing arrangement the contract is typically underpinned by a string of amended artifacts such as sub-contracts, high-level governance and process agreements and service level agreements (SLA). These can all be considered *standard specifications*, which are monitored and evaluated in order to secure that the transactions are performed as agreed upon. Furthermore, the feedback – in the form of reporting – can form the basis for *sanctioning* insofar the contractual agreements are not honored, either by changes to the financial aspects of the contract as per the contractual agreement itself or – in extreme cases – in court. With regards to *rewards*, initiatives that are not a part of the mandatory service delivery, such as supplier-side innovations, can be regarded as a reward; insofar the contract has built-in financial incentives for such behavior. Obviously, the ultimate sanctioning is early termination of the contract and the ultimate reward is extension of the same.

However, there is another aspect to output control than the contractual agreements. As argued in the introduction to this chapter there are two reasons why partners in IOR's make contracts, namely control and coordination (Mellewigt et al., 2007). Thus, in addition to specifying obligations a contract also provides an outline of how the collaboration is expected to play out on a high level. The key here is the *intent* of the

contractual partners, which signifies that each and every detail cannot be covered by a contract. Consequently, over time – as the partnerships progresses and matures – more detailed standard specifications of output can be agreed upon and implemented in order to meet the overall objectives of the contractual agreement. Such standard specifications are arguably still to be considered as instances of output control. Moreover, the monitoring, evaluation, feedback as well as rewarding and sanctioning are also to be considered as output control in this perspective.

Analyzing Control of Workplace Behavior

Regarding organizational values and norms, as standard specifications for workplace behavior may at the outset appear to be quite a tall claim, one could raise the point that a ‘standard specification’ is characterized by its accessibility in writing to all involved actors. This is hardly ever the case when it comes to organizational norms and values. However, the concepts of norms and values are characterized by being something that a group of people has in common, adhere to and know, so to speak, “by heart”.

Arguably, norms and values are more robust than written artifacts to the group that have these values and norms in common. Norms and values are internalized rules, which are not required to be in writing, in order to be effective for those that belong to the group. On the other hand, norms and values are very hard to grasp for people not belonging to the group that share these. In other words, to the out-group they are to a certain extent inaccessible up until the point where members of the in-group convey them explicitly to the out-group; or out-group members ‘discover’ the norms and values by themselves over time.

Thus, norms and values can indeed be regarded as standard specification. The interesting question is not so much whether such a specification is in writing, but rather if it is in some way or another made accessible to those who, given their status as out-group members, do not know it “by heart”. We can compare this to the notion of standard specifications within formal control: Whether a specification exists in writing

is less interesting. What is interesting is whether such a standard specification is *accessible* (Thornton et al., 2012). That is, the relevant question to pose is this: Do the relevant actors know of the existence of a standard specification or not? If a group of actors are not aware of the existence of a standard specification, it might as well not exist, as it has no control effect on this group.

The same arguments holds good for standard specification of workplace behavior: If a standard specification of norms and values is not accessible to the relevant actors, it has no controlling effect. Thus, when we enquire about standard specification of workplace behavior, we enquire about the *accessibility*, rather than whether or not it exists.

How do we monitor workplace behavior? As elaborated in the last chapter collocation facilitates the possibility to monitor each other's behavior at the workplace – and lack of collocation is a hindrance to the same. The term *monitoring* suggests that it is something that is done deliberately, but as I have argued in the last chapter 'Challenged by Distance', this is not necessarily the case. Rather, passive face time enables actors to monitor each other, which is done both consciously and unconsciously. While monitoring has a connotation of being something deliberate when we are talking about formal control, this is not necessarily the case when it relates to workplace behavior. Thus, instead of talking about 'monitoring' I will address it as 'observing' moving forward in this chapter, as this term has a more neutral connotation that can embrace both the formal monitoring that happens when formal control mechanisms are applied as well as the lesser structured and, in some cases, unconscious observation of other actors that characterize social control.

In the last chapter I have shown how passive face time leads to positive *assessments* of ability, integrity and benevolence respectively. In this chapter I will adhere to Weibel's (2007) categorizations of control and thus label it *evaluation*. In sum, monitoring and evaluating workplace behavior will be a reiteration of some of the main analytical

findings from the previous chapter. Consequently, the findings presented here are not new. However, in order to bring forth a robust and coherent analysis of how control mechanisms affect trust building, some level of repetition is needed.

While analysis of monitoring and evaluating in this chapter are partly drawing on analytical findings on passive face time and assessments from the previous chapter, *feedback* will add a new perspective. Arguably, both monitoring (passive face time) and evaluation (assessments) can happen without the other party knowing about it. This can facilitate trust, insofar the assessments are positive, but are not control in itself. Only if the actors who are being controlled are aware of this will it have a controlling effect. This does not in itself require feedback – take for instance Bentham’s panopticon – if sanctions are severe enough. But arguably, in most cases in the modern work life feedback would – in some form or another – be present when controlling.

There are indeed many ways to *reward or sanction* adherence respectively lack of adherence to expectations on workplace behavior. Financial incentives, promotions and praise are some of the most obvious forms of rewards. However, there are more subtle rewards and sanctions too, such as group-inclusion and visibility. In the analytical sections of this chapter I will take a closer look at how rewards and sanctions are used as control mechanisms and subsequently how they affect trust.

Summing up & Graphical Representation of the Analytical Framework

I started this chapter arguing that trust and control form a duality in which the two constructs are highly interrelated. Below I will unfold this argument in greater detail by shedding light on *how* they are interrelated. Subsequently, I will analyze how control mechanisms are used in the collaboration between the client and the vendor organization (research question #1) and how the use of control mechanisms affects the perceived trustworthiness of the vendor-side actors, in the eyes of the client-side actors (research question #2).

However, before moving forward let me briefly sum up how formal control as well as normative control can be captured using an integrative framework: On one hand the literature on control suggests that there are two distinct forms of control, namely formal control and normative control, where the first can be divided into control of process and output respectively. The three categories – process, output and workplace behavior – are focused on *what* to control. On the other hand, Weibel (2007) suggests that there are three main categories of *how* to perform formal control, namely a) standard specifications, b) monitoring, evaluation and feedback and c) sanctions and rewards. I have argued that the same categorizations can be used for understanding how normative control is performed. However, for the second category I have argued that the term monitoring should be replaced with ‘observation’ as this does not have the same connotation of something “surveillance-like”. Thus, the analytical framework that will be used in the remainder of this chapter to understand how control mechanisms are used in the empirical context can be illustrated as done in table 6.2 below.

	Standard Specifications	Observation, Evaluation & Feedback	Sanctions & Rewards
Process	Expected work process is specified.	Work process is observed (monitored) and evaluated. Feedback is given.	Adherence to work process is rewarded / sanctioned.
Output	Expected work output is specified.	Work output is observed (monitored) and evaluated. Feedback is given.	Adherence to output goals is rewarded / sanctioned.
Workplace Behavior	Organizational values and norms are specified and accessible to the relevant actors.	Workplace behavior is observed and evaluated. Feedback is given.	Workplace behavior is rewarded / sanctioned.

Table 6.2

Perspectives on the Relationship between Control and Trust

Arguably, trust and control are two sides to the same coin as both constructs are aiming at reducing perceived risk in interactions. As we know from Rousseau et al. (1998) trust is “a psychological state comprising the intention to accept vulnerability based upon positive expectations of the intentions or behavior of another” (p. 395). Control, on the other hand, is “a regulatory process by which the elements of a system are made more predictable through the establishment of standards in the pursuit of some desired objective or state” (Leifer & Mills, 1996, 117). Thus, when we trust we accept a risk based on positive expectations of *intentions*, whereas control is about making risks more *predictable* through the use of control mechanisms, or, as Möllering (2006) calls it “structural influences on the embedded other” (p. 195)

What trust and control furthermore have in common is that both constructs seek to reduce complexity. Das & Teng (1998) emphasize how “virtually every commercial transaction has within itself an element of trust” (p. 494) and adds that as “it is impossible to monitor every detail in most exchanges, firms must always have a minimum level of trust” (ibid.). By trusting, one reduces complexity by establishing positive expectations, whereas control reduces complexity by focusing on what is expected to be the key differentiators.

According to Das & Teng (1998) “trust and control are the two contributory factors of confidence in partner cooperation” (p. 494), where confidence is defined as “the perceived level of certainty that the partner will behave in a desirable manner” (ibid.). Thus, the aggregated level of trust and control determines an actor’s confidence. According to Möllering (2006) the relationship between trust and control forms a duality, which “can lead to positive expectations of others” (p. 195).

However, as Das & Teng also notes, the relationship between trust and control needs clarification (Das & Teng, 1998, 493). Specifically, we need to understand whether

one or both of them are necessary in order to reach certainty or whether one can be sufficient.

As it is arguably impossible to control every single detail, trust is essential in order to build confidence and reduce perceived risk. Following that line of thinking we can say that the higher complexity a risky interaction entails, the bigger is the need for trust among the involved parties. However, in less complex scenarios it may be possible to have high confidence without trust, if adequate control mechanisms are in place. However, as Möllering (2006) reminds us, even in such situations one must trust that the control mechanisms works as actors “do not need to trust in an impenetrable system as a whole but ‘only’ in the functioning of controls” (p. 72). Thus, in order to build and maintain confidence trust is necessary.

On the other hand, the same is not the case when it comes to control: If trust is strong, the need for control mechanisms can be rendered obsolete. Consequently, “when it is possible to fully trust a partner, there is no need to control its behavior. Control comes into play only when adequate trust is not present. For instance, if a manager trusts employees to be self-motivated to do the best job possible, no behavior [i.e. process] or outcome control will be needed” (Das & Teng, 1998: 495). That is, control is not a necessity per se.

With regards to whether one of the two constructs, trust and control, is sufficient to establish confidence and lower perceptions of risk, we can – following the same line of thinking – say that in complex scenarios trust may be sufficient, but control cannot be sufficient. Only in less complex scenarios can control be sufficient to establish confidence, as complex scenarios will always entail that incompleteness with regards to control.

Control Mechanisms as Substitutes, Catalysts and Inhibitors to Trust

In addition to understanding the role of trust and control in establishing confidence and lowering perceptions of risk, we need to understand how these two constructs affect each other.

Traditionally trust and control have been understood as each other's substitutes (Das & Teng, 1998). That is, the more there is of one the less is needed of the other in order to lower risk perceptions. Furthermore, the relationship between trust and control is, in this line of thinking, competing against each other as "control mechanisms imply that one party does not trust the other. Since trust has the characteristic of reciprocity, one tends to think along the lines of 'I do not trust you because you do not trust me.' Consequently, this may evolve into a vicious cycle" (Das & Teng, 1998: 501) where control undermines trust, because 'to trust' "implies the exclusion of deliberate control over the behavior of others" (Das & Teng, 1998: 495). Trust and control are, so to speak, two completely different approaches aimed at solving the same problem of how to raise confidence and lower perception of risk.

However, research suggests (see Costa & Bijlsma-Frankema, 2007; Poppo & Zenger, 2002 for reviews) that the relationship between the two constructs is more complex than this, as implementations of control mechanisms can have a positive effect on the level of trust. That is, control breeds trust. Goold & Campbell (1987) argue that because control provides transparency into performance, trust can be strengthened by the use of control mechanisms insofar the controls render a positive result visible. In the same line of thinking, Sitkin (1995) argues that formal rules and standardized procedures are conducive for "the development, diffusion, and constructive institutionalization of trust in organizational settings" (p. 187).

Thus, the implementation of control mechanisms can have three distinctively different impacts on the trust level. They can *substitute* for trust; be a *trust catalyst*; and an *inhibitor* to trust. On one hand controlling may have a negative effect on trust and on

the other hand it may have a positive effect on the same. In the remainder of this chapter I will take a closer look at the use of control mechanisms that are used in the collaboration between the client and the vendor; and analyze their effect on perceived trustworthiness.

Use of Control in the Offshore-Outsourcing Collaboration

As mentioned in the introduction to this chapter the main focus will – given the fact that the collaboration is essentially a supplier-client relationship – be on how the client controls the vendor.

I have argued that control can be divided into three major categories, namely process control, output control and normative control. However, these are theoretical constructs and the actual control mechanisms applied in the context of this offshore outsourcing collaboration do indeed cross this theoretical boundary as specific control mechanisms can be linked to more than one type of control. One example is the change management process that to a large extent is about controlling a process, but also has elements of output control, as the result of a change is indeed a specific output. Such control mechanisms will be introduced in the theoretical category that is the “best fit” and I will argue why it is the best fitting theoretical category in each such instance.

In the three sub-sections below I will introduce the most significant control mechanisms that I have identified through observations, informal conversations and interviews and hence provide an overview of control as it appears in the empirical settings sorted using the three theoretical categories: output control, process control and normative control. Subsequently, the effect of the utilization of these control mechanisms on perceptions of trustworthiness will be analyzed.

Output Control: Measuring Goal Achievement

SLA Measurements

As a natural consequence of having a contract that specifies the relationship between what the vendor is expected to deliver and the remuneration the vendor receives for its services the contractual relationship specifies a number of measurements designed to monitor whether or not the services agreed upon in the contracts are in fact delivered. Such specifications are designated as Service Level Agreements (SLA). The SLA report consists primarily of two different types of objects of measurement: System³ availability and incident handling. All the IT-systems that the vendor operates on behalf of the client are measured in terms of availability; that is, whether or not the system is accessible to those users or other systems that make use of the system and if it conforms to a defined response time (the time it takes the system to execute a specific set of commands). The availability is reported as a percentage (e.g. 98.5) per system, which indicates the uptime of the system in question. Thus, the aggregated SLA report consists of a number of percentages that delineate the performance of each and every system and these percentages are colored green or red depending on whether or not the actual performance of a system meets the minimum performance defined in the SLA. This way, meeting the SLA requirements is a simple yes/no question. If the color is green the system availability meets or exceeds the availability agreement and if it is red it fails to meet the agreement. In case of the latter a complex system of penalties and compensations is evoked.

The other object of measurement in the SLA report is incident handling. Incidents are unplanned interruptions to an IT service or a reduction in the quality of an IT service,

³ Please note that I use the term 'system' rather freely to cover both databases; applications; infrastructure, such as network and printers; and hardware operations. While this is an abstraction that IT-professionals may find unreasonable, I have done so as I do not believe that a more precise technical terminology is necessary to the purpose of this chapter. In fact, it would probably confuse rather than enlighten the reader.

which can be reported automatically, by the means of surveillance systems, or by users who experience that a service is not working as expected. After incidents are submitted to the helpdesk they are categorized as priority 1 to 4 depending on their criticality, their impact on the business or impact on number of users. This is done according to a set of agreed definitions based on the ITIL framework (see sub-section on process control for an elaboration of ITIL). All types of incidents are measured on ‘response time’ (i.e. the time between an incident is submitted and the vendor starts to work on resolving it) and ‘resolve time’ (i.e. the time between an incident is “picked up” – that is, when the vendor starts to work on resolving it – and resolved). Both the expected response time and resolve time as defined in the SLA depend significantly on the priority of the incident, varying from minutes to days in response time and hours to weeks in resolve time. Just like system availability, incidents are marked green or red respectively, depending on whether or not the incidents in a given category in a given month meet the agreed service levels.

The reporting on SLA fulfillment is done on a monthly basis. The data on system availability is generated on the basis of various surveillance systems provided by the vendor, whereas the data on incident handling is generated based on a system called Remedy, which is also provided by the vendor. But unlike the surveillance systems used for measuring system performance Remedy provides full transparency to the relevant client-side actors, as they can track the development of each single incident reported. On the basis of these tools an elaborate power point presentation is prepared by the vendor and sent to the relevant client-side managers – the CIO, the two service managers and the director of IT operations. A few days after the report has been conveyed to the client-side staff a service delivery meeting is held. This meeting is attended by the two service managers and the director of IT operations from the client; and from the vendor the head of the OMC (also designated as Service Delivery Manager, Operations), the Service Delivery Manager for Applications, and the Change Manager participate from India alongside two vendor-side actors based in Denmark:

the native Danish Service Manager and usually one onsite-allocated Indian consultant who acts as single point of contact for the SAP team (which is one of the larger teams with a lot of interaction with the business part of the client's organization).

During these service delivery meetings the participants walk through the report. In most cases all metrics that are green are not scrutinized individually. Rather the focus is on metrics that are red. The only exception to this are metrics that the client-side actors believe should be marked red for some reason, which is a rare case that in all instances I have observed are resolved amicably after the vendor-side actors have provided a more elaborate verbal explanation. Metrics that are marked red are discussed in these meetings, where the vendor-side representatives are expected to explain what measures they are taking to improve the outcome. In some cases red measures are 'accepted' by the client-side actors, meaning that they assume responsibility for the low score because of negligence, such as lack of investment in hardware or software upgrades that has been brought to their attention earlier.

Furthermore, the SLA report is the basis for the quarterly steering group meeting, which is attended by the same group of client-side staff members as the service delivery meeting. In addition, the CIO and the head of the project management office, who are the actors overall responsibility of the contract, participates. From the vendor-side the two service delivery managers, the native Danish service manager and the overall account responsible, who is also the direct supervisor to the head of the OMC, attend these steering group meetings. The steering group meetings are predominantly aimed at the more strategic aspects of the collaboration. However, the SLA report is always on the agenda for these meetings, and issues that have not been resolved satisfactorily via the service delivery meetings will be discussed and resolved among the members of the steering group. Altogether, the SLA measurements are *the* central output control. This is not to say that it is the *only* form of output control that is being utilized in the collaboration, but rather that such other control mechanisms are only to a

limited extend about controlling output, and to a larger extent about controlling process or workplace behavior. They will therefore be dealt with in these respective sections.

To sum up in accordance with my analytical framework: SLA measurements are the epicenter of output measurements in the collaboration. The expected work output is specified according to a *standard specification*, namely the service level agreement. The output is *monitored* by the means of various surveillance systems and the incident handling tool, Remedy. At the monthly service delivery meeting the client-side participants evaluate the output and both parties provide *feedback* on the performance. In some cases, when the metrics are ‘red’ and the client-side do not accept responsibility there is a potential *sanction* in the form of compensation.

Process Control: Discipline in ‘the way we work’

Client-side actors have repeatedly mentioned that they perceive themselves as more mature in terms of outsourcing now, than when they started to outsource in 2007. The vendor-side actors support this perception, and one manager assesses the client as a “very mature customer and very constructive” (Interview #21). When asked about what characterizes maturity client-side actors explain that it is about learning to let the vendor provide services without having to know every detail yourself. It is in other words about focusing on the output, rather than the process. In this perspective one could be lead to the conclusion that the extent to which process control is exercised is limited. However, this is not the case. In fact, the process control is significantly more elaborate than the output control. In this section I will illustrate the most prevailing forms of process control that are utilized.

The ITIL Framework

ITIL is an abbreviation of ‘Information Technology Infrastructure Library’ and this somewhat odd name is the title of a framework for IT-operations. It is a ‘best practice’ within IT used worldwide in a magnitude of different industries and types of organizations to ensure a common practice and understanding of concepts. ITIL is also

the process framework used in this. Throughout my fieldwork I have been met with the answer “it’s standard ITIL” (Field Notes 20130226) when I have enquired about the processes used in the collaboration between the two organizations. On my very first day of fieldwork a Danish vendor-side actor told me that “using uniform processes are a key to the savings in outsourcing”. (Field Notes 20130214) He furthermore explained that the processes implemented in this particular collaboration are based on the vendor’s standard interpretation of ITIL with a few alterations to cater for the current organizational setup in the client organization.

ITIL is thus a standard of how to do IT operations on a high level, which requires local tailoring since ITIL does not come with e.g. specific templates to use in daily work and does not prescribe which tools to use to. For instance, any IT organization (of a reasonable size) would arguably require a tool supported process on how to release new functionality into the production environment; ITIL provides high-level guidelines and terminology, but does not suggest which tools to use or how to practically submit, approve and implement changes. Thus, the ITIL framework does not in itself provide *standard specifications* on how to do the work; it does not offer a method on how to *observe, evaluate and give feedback* on process adherence, but only states that in order to obtain process maturity this should be done; and it does not suggest any *rewards or sanctions* for process adherence or lack of the same. Thus, in order to understand how ITIL is used as a control mechanism, we must turn to concrete instances of implementations of ITIL processes. One such instance is the change management process.

The Change Management Process

The change management process is by no means the only concrete instance of an implemented ITIL process. However, together with the processes for handling incidents (which I will discuss later) it is the process that the client-side actors are most frequently exposed to. The reason for this is that the change management process

requires extensive knowledge of the business: As the change process is about introducing technical changes to the current environment it requires knowledge about how the system is used, when downtime is acceptable, and how the system under change is interfacing with other systems. This stands in contrast to most other ITIL processes, which are focused on keeping a technical environment running. Examples of such processes are capacity management IT Continuity.

The overall responsible for coordinating planned changes to the environment is the vendor-side change manager, who tells what he does:

“I organize things and ensure every track raises a proper change request, which is submitted on time and I ensure all the change requests are coming through a proper channel and have been planned. [...] I ensure that [...] we'll have time for rollback in case there is any mistake or any slip [...] I ensure that we have a rollback plan in case something goes wrong so we don't panic, but can set environment back to normal. So I ensure that everything is being planned well in advance. [...] I'll be able to check whether the process is being followed but I'll not be able to judge or be strong in the implementation steps. So I get in touch with the track leads to ensure the work submitted is correct. Once they give a sign-off I take it forward: [...] once it's been approved by the management, the client side and from our side we approve and I check with the durations [schedule] being followed strictly.

There are chances for us to have failures. So in that case we intimate the stakeholders and the business that this change is not being performed and it was rolled back. Once the change activity has been rolled back [...] I sit with the team and ask them to provide a post implementation review: Why did the change go wrong? [...] We analyze and get the document filled and we analyze from scratch, to make sure that when we perform the change

there are no failures. For major changes it will be discussed and justified to the customers that this is the reason why this went wrong and we ensure that it's not happening again" (Interview # 19 – vendor-side actor)

As the quote shows, a significant part of the change manager's job is making sure that the processes are being followed, but he is also relying on track leads for technical expertise. During the week he collaborates with vendor-side colleagues to make sure that upcoming changes are prepared according to the process descriptions and every Tuesday he presents these to the client-side employees at the weekly standing change board meeting. Arguably, the change management process introduces two sets of controls. One is the control that the change manager performs which is directed towards the technical staff and track leads within the vendor organization. Another is the control that client-side actors perform of the change management process at the weekly change board meetings. The sole focus here (given by the scope of this chapter) will be the latter.

At the weekly change board meetings, the change manager conducts a detailed walk-through of all the elements in the change template for every single pending change. This template, which can indeed be characterized as a *standard specification*, forms the basis of the client-side *evaluation* of the change. Based on this the client-side actors give *feedback* accordingly on whether they accept the proposed change or reject it based on either lack of process adherence or for business-related reasons that do not relate directly to the change management process itself, but rather to embedded knowledge they may have. With regards to *rewards and sanctions* based on adherence to the change management process, this instance of process control differs significantly from the types of rewards and sanctions that are effectuated based on output control: Where output control results in rewards and sanctions aimed at an organizational level the rewarding and sanctioning based on the control of changes are aimed at a *person*, namely the change manager.

Over the course of my fieldwork I have participated in twelve change board meetings and my observations in these meetings all suggest that the client-side actors perceive the change management processes as being embodied by the vendor-side change manager. Thus, in instances where the client-side actors are dissatisfied with the thoroughness of the process-based preparation of a change they always express the dissatisfaction as something related to the change manager's person and never to the role or the process. Such dissatisfaction is exhibited repeatedly and the client-side actors assess the change manager as "a secretary who fills in templates and sends them up here [to Denmark] for approval" (Interview #6), rather than as someone who adds value to the collaboration.

To sum up: The change management process is a form of process control that can indeed be regarded as a *standard specification*, which is *observed and evaluated* by client-side actors at the weekly change board meetings. These client-side employees furthermore provide *feedback* on the process, by their acceptance, rejection and comments on the individual changes. In terms of the *reward-sanction* duality the perception of the change manager's poor performance can ultimately, and very likely, lead to a sanction in the form of discontinuation of the specific change manager.

Handling Critical Incidents

The process for handling critical incidents is another process that the client-side actors are heavily exposed to. In ITIL terms an incident is – as explained earlier in this chapter – an unplanned disruption or degradation of an IT-service. Such disruptions can be reported by users of IT-systems or automatically, by the means of surveillance systems. Incidents can be more or less critical; depending on a number of factors such as financial or commercial impacts, data security violations, and number of users affected. In this particular collaboration there are four categorizations of incidents – priority 1 to 4, based on a set of predefined parameters – where priority 1 and priority 2 incidents are considered as *critical incidents*. When such critical incidents occur the

process dictates that the vendor must inform the client, whereas priority 3 and priority 4 incidents are handled without client-side involvement. One of the two incident managers at the OMC explains the initial part of the process for handling critical incidents like this:

“I collect all the information from service desk to find out what exactly is wrong: what the impact is on the business; and whether we have any workarounds. So, I analyze all those things and I coordinate with the teams to find out what is technically wrong and how long is it going to take to fix it. [...] Then I have to communicate with the client stating what is wrong and how long are we going to take to fix it. So I get an approval from them [the client] and then I talk with the teams [at the OMC] and I’ll make sure things are done”. (Interview #22 – vendor-side actor)

As soon as a critical incident is reported the incident manager follows a standard script as described above. On one side the incident manager is coordinating with the technical staff at the OMC and on the other side he is coordinating with the client-side, making sure they are informed on the progress. The latter is done via a so-called management bridge, which is a phone conference attended by the incident manager, a representative of the overall OMC management as well as one or more client-side representatives, where the incident manager “updates the customer on what is happening every 15 minutes” (Interview #22).

This process is the *standard specification* of how critical incidents are handled, which, by the means of the management bridge, enable the client-side employees to *observe and evaluate* whether the process is being followed and, in case it is not, to give *feedback* on the same. Through my interview with the incident manager I enquired if they always follow this process to which she answers:

“We basically try to stick to the process even if the customer says okay to deviate. But later, if something goes wrong [and I have been] deviating the process then I’m going to take the responsibility. So it’s my own profile and my own job that I’m looking at now. I am really very hesitant and I don’t take the chance. [...] That is how I am”. (Interview #22 – vendor-side actor)

The incident manager furthermore tells that critical incidents quite often occur during out-of-office hours and even in the middle of the night. However, this does not change the fact that she adheres closely to the process, even if it means waking up a client-side actor for something that may later turn out to be easily solved.

That happens many times. I look at what’s the time there and so he must be sleeping so should I call him? But most of the times I am forced to call him because I don’t want to take a chance when somebody goes and asks me why haven’t you informed us [...] I do so, even if it’s late night. [...] The client also feels that if something is happening in their environment [...] they want them to be the first people to know. (Interview #22 – vendor-side actor)

In her own words, her key responsibilities are to make sure that the service level agreements; with regards to response time and resolve time (see section on Output Control) are met. That “things are done within time. That is my primary responsibility” (Interview #22) and to make sure that the handling of the critical incident is coordinated internally and that the client is continuously informed: “So if we are giving them the frequent updates, they are happy about it. They don’t think that we’re not working and we’re just delaying their work”. (Interview #22)

This strict adherence to process that the Incident Manager displays is recognized by client-side counterparts. During the client visit at the OMC the two incident managers are repeatedly acknowledged for their work (Field Notes 20130911). Additionally, during informal conversations one of their client-side counterparts told me that despite

the inconvenience he appreciates being woken up in the night, when critical incidents happen, as he wants to be informed and involved. He furthermore refers affectionately to the incident managers as “my good friends” (Field Notes 20140129)

The Mother of All Critical Incidents

All IT-organizations experience critical incidents from time to time. Inevitably. Any IT professional would know that and this collaboration is not an exception. In the vast majority of cases such incidents are handled according to the standard specification. Likewise, most IT operational matters are handled according to processes, but even so – sometimes errors occur. The incident manager explains that the client-side actors “are technically strong” (Interview #22) people who understand that complex issues arise sometimes, which take time to handle. In most cases, there is not even the slightest hint of doubt that they believe that the vendor acts according to defined processes, standard specifications, and thus do the best they can to prevent that critical incidents arise. However, there is one notable exception: A DNS-error⁴ that occurred Friday afternoon on the 18th of January 2013. This incident was different than other incidents for two reasons. First of all because it had a huge impact on the business, as all — the client’s commercial websites, in total more than forty, were completely inaccessible for almost two hours in the middle of the day. Second, because the incident was a human error, where a specific vendor-side actor had disregarded the process for updating DNS entries. The fact that this particular vendor-side actor had disregarded the same process earlier, however only with relatively minor consequences, made the situation even worse.

⁴ DNS, Domain Name System, is the service that translates domain names (such as www.cbs.dk) into IP-addresses (such as 130.226.47.28). The Internet is based on IP-addresses and to understand which IP-address belongs to a certain domain name DNS is used. If the DNS entries are overwritten, no IP-address is associated with the domain name. Consequently the user sees a blank page in the web browser.

At my second day of field studies I observed a meeting where this specific incident was discussed internally in the client organization. Several client-side actors did not want that particular vendor-side actor associated with them anymore (Field Notes 20130213). This eventually led the Editor in Chief and CEO to demand that the vendor-side actor in question, a technician, should be removed from this account. This particular incident, arguably the *mother of all critical incidents* as one called it (Field Notes 20130215), serves as a good example of how important processes and process adherence are perceived among the client-side actors. In most cases adherence to the standard specifications are not monitored by the client. The vendor is assumed to follow these standard specifications and evaluate them, themselves. Thus, it is indeed possible that vendor-side actors circumvent processes, without such circumvention ever being noticed by the client. But in cases where circumvention leads to operational failures the circumventor can potentially face severe consequences. Such consequences are what the incident manager refers to when she says that she is hesitant to diverge from the processes as it can have consequences for “my own profile and my own job” (Interview #22).

Normative Control: Gaining Transparency

The two forms of control introduced above – output control and process control – are instances of *formal control*: Output control is formalized by contractual agreements, such as SLAs, agreed upon at the very outset of the collaboration; and process control, which at an abstract level is also formalized by the means of contractual agreement and at a concrete level is agreed upon and refined over the course of the collaboration. Both types of control are *formalized* – they are mutually agreed upon and put in writing.

Normative control is distinctively different from formal control as this form of control is typically characterized by *not* being cemented by written agreement. Rather, normative control is, in most cases, characterized by the *absence* of written standard specifications. That is not to say that workplace behavior is not, or cannot, be

specified. Indeed, codes of conduct or other written descriptions of what is expected in terms of workplace behavior can exist. However, normative control is about “controlling the underlying experiences, thoughts, and feelings that guide their actions” (Kunda, 1992: 11). That is, it is not merely about controlling actions (which can be sought by the means of written codes of conduct), but about controlling what *guide* these actions. Arguably, codes of conduct are not instances of normative control, but rather process control. Thus, the focus in this section is not on written descriptions of workplace behavior, but rather on the *informal* control.

The collaboration is on one side characterized by being physically close when client-side actors are collaborating with the onsite-deployed Indian and Danish vendor-side actors. On the other side the collaboration is also characterized by being physically distant, in cases where client-side actors collaborate with OMC staff. This dual mode of collaboration is also characterized by utilizations of distinctively different mechanisms for performing normative control. Thus, ‘normative control of those close to and far-away from the clients will be analyzed in separate subsections below.

Normative control of ‘the near one’s’

“If a stranger tells you: “I need you to do this”, you’ll say: “okay, if I have time I’ll do it”. But, if your friend tells you then you’ll make extra effort. That’s the difference, I think.” (Interview #21 – vendor-side actor)

The stranger/friend dichotomy that the vendor-side actor elaborates on in the quote above frames the difference between the relationship that the client-side actors form with onsite and offshore vendor-side actors respectively. Vendor-side actors that are deployed onsite are seated close to the client-side actors. Over time, a cordial relationship is formed, and the vendor-side actors’ merits are recognized by the client-side actors (as reported in Chapter V: ‘Challenged by Distance’). The ease of access – or as I call it in the aforementioned chapter ‘being available’ – has a clearly positive

effect on the two parties' ability to collaborate, but it arguably has another connotation than the mere fact that communication is perceived as easier in a co-located work environment, as co-location seems to minimize – if not completely remove – conflict.

In chapter V I have argued that distance leads to lack of transparency. In line with Hinds & Bailey (2003) I find that the distributed collaboration is, to some extent, a case of “Out of Sight, Out of Sync”, manifested by task conflict, motivational conflict and process conflict. That is, the client-side actors voice concern that tasks handled at the OMC in India are sometimes of sub-optimal quality due to lack of understanding of the business domain; that the OMC staff's motivation is below par and “things are just hidden or ‘forgotten’ if they [the OMC staff] don't know how to solve them” (Interview #6); and that processes are not followed rigidly (i.e. the case with the DNS error and the dissatisfaction with the Change Manager, both reported earlier). Claiming that such conflicts *characterize* the collaboration when the actors are distributed is a coarse exaggeration. In fact, in most cases the distributed collaboration is quite smooth and without conflict. What is interesting, however, is that throughout my field studies I have not witnessed *any* instance where the collaboration between co-located actors from the two organizational entities has been conflictual. This does, of course, not mean that there are no conflicts in the collaboration between employees from the two organizational entities when they are co-located, but it does signify that such conflicts are minor and not considered worth mentioning by the client-side actors.

However, with regards to the co-located work environment at the client's premises one recent development is worth noticing: When I embarked on my field studies in early 2013 the onsite deployed vendor-side actors were placed at another floor in the building. While all of client's own IT-employees were placed at the third floor, right next to the Danish vendor-side actors, the Indian onsite-workers were placed on the second floor. The fact that there were no Indian faces visible in the office I was located in, despite the fact that I was told that a handful of Indian vendor-side actors were

deployed onsite, made me enquire on their whereabouts. When I asked where they were I was told that they were on the second floor. Then I started to dig into the reasons for this physical displacement. It turned out that I got several different explanations. Some client-side actors told me that it was because of lack of space (despite the fact that there were free seating at that point in time and that it was generally accepted that on days where everybody was in, some had to sit in the coffee kitchen, in the lounge area or in another part of the building). Others told me that it was because the vendor-side actors themselves preferred being close to each other, rather than being close to their client-side counterparts. And one told me that during the transition the Indian vendor-side actors had been seated this way and that they just never got around to change it, while another explained that due to mold in the building parts of the staff had to be relocated and “as the Indians were simply the lowest in the hierarchy and thus the easiest ones to move” (Field Notes 20130221), they were now placed away from the rest of the IT-department. On the other hand, the onsite-deployed vendor-side actors told me that they did not know why it was so. Some guessed that they were too loud when speaking to each other and on the phone; some guessed that it was just a random thing that nobody had considered. Unlike the client-side actors, who seemed perfectly all right with this arrangement, all the vendor-side actors found it strange and counterproductive, though none had ever voiced their opinion to the client-side actors.

A few months later the onsite-deployed vendor-side actors were moved to the IT-department at the third floor in connection with a bigger organizational change. The fact that the onsite-deployed vendor-side actors were moved in to the IT-department seemed to foster a closer and more frequent collaboration: Before the move, I had spent some of my days of observation studies sitting next to the client-side actors, some sitting next to the native Danish vendor-side actors and some at the second floor, sitting right next to the onsite-deployed vendor-side actors. This shifting allowed me to

observe the number of face-to-face interactions between them, which was essentially limited to the onsite-deployed vendor-side actors going to the third floor when called upon – something that only happened once or twice per day in total for the whole group. The client-side actors only went to the second floor on a very few occasions. After the shift this changed. I saw how the collaboration was now characterized by frequent interaction, where they frequently came by each other's desks to discuss matters in which they collaborated.

I also noted that the change in seating seemed to have an impact on the way the client-side actors spoke of the onsite-deployed vendor-side actors: Before the move they were by and large spoken of as 'The Indians', whereas this changed to being personalized after the move. Communication shifted from "you should go and talk to the Indians" to "you should go and talk to Srinivas"; from "can you ask the Indians to have a look at this" to "can you ask Pradeep to have a look at this". Thus, the cordial and friendly tone I described in Chapter V: 'Challenged by Distance' was in fact not predominant before the move, though still relatively more cordial than the relationship with the vendor-side actors working at the OMC in Chennai. But it definitely came to be predominant over the course of the following months and throughout the remainder of time I spent doing observation studies in the field.

How can we characterize the normative control that is imposed on the vendor-side actors when the actors from the two organizational entities are co-located? During interviews with client-side actors I have asked them to describe the relationship between themselves and their closest colleagues at the client organization (Interviews #8, #12, #13, #14, #15, #16, # 17). First, I asked them to note three words describing the relationship and subsequently to elaborate on these words. I argue, that the elaboration of themes that are common among the client-side actors I have interviewed can be regarded as norms and values in the client organization. While they most certainly do not constitute a complete description of the set of values and norms, they

are indeed an important subset. Thus, they can be regarded as *standard specifications* of workplace behavior. During the interviews three common themes surfaced: *Informality, collaboration and responsibility*.

After enquiring about the characteristics of collaboration with their client-side colleagues I asked them to describe the relationship with their vendor-side counterparts the same way, that is, by noting down three words and elaborating them. While some interviewees chose the same words, some noted other words. But all interviewees started elaborating on how they perceived their vendor-side counterparts by relating – positively as well as negatively – to the words they had used to describe their closest client-side colleagues.

Informality as a standard specification of workplace behavior was elaborated as a ‘flexible’ and ‘relaxed’ mode of collaboration, where communication is characterized by being ‘non-submissive’ even across hierarchical positions and where people are joining in on informal gatherings, such as celebrations and after-hours arrangements. In terms of *evaluation* of the vendor-side actors’ adherence to these standard specifications the interviewees indicated that the vendor-side actors working onsite over time learned to adapt to this informal way of collaboration. However, one noted, in line with my own observations, that even though they did in fact participate in the informal gatherings, they tended to keep to themselves: “We all stand there, joking, talking. But the Indian keep to their separate group. They are not really a part of the community” (Interview #16).

Collaboration as a standard specification of workplace behavior was elaborated as something where the actors ‘shared knowledge’, had a ‘mutual respect for each other’s contributions’, where people treat each other as ‘working with, not against’ each other and were ‘honest’ and ‘spoke one’s opinion freely’. Again, the client-side actors evaluated that they believed that the onsite-deployed vendor-side actors were in line with this value of collaboration and thus possessed the same values as themselves.

The last common theme, *responsibility*, was elaborated as something that had to do with showing ‘commitment’, ‘being thorough’ and ‘following through on promises’ as well as ‘working towards common goals’. As with the two other values the perception among client-side actors was clearly that the onsite-deployed vendor-side actors showed a large degree of responsibility. Thus, again, they were *evaluated* as following the same *standard specification of workplace behavior*.

Thus, the three values are, from the client-side actors’ point of view adhered to by the vendor-side actors located onsite in Copenhagen. Earlier in this chapter I have argued that if control is to have an effect, some level of feedback is needed. If the one that is subject to normative control does not know that he is being evaluated, he is arguably not being controlled at all, but merely subjected to control mechanisms. The difference is important. Consequently, it only makes sense to talk about a normatively controlling effect insofar the vendor-side actors are in some way or another made aware of the result of their client-side counterparts’ evaluation. This can be done via feedback, which, as defined earlier, differs from sanctions and rewards by being free of consequences; or via sanctions and rewards. Arguably, sanctions and rewards can be instigated without any feedback, but in most cases sanctions and rewards are accompanied by some feedback, implicitly or explicitly. Therefore, the question is: Are they made aware of these evaluations? And if so, how?

As elaborated in Chapter V: ‘Challenged by Distance’ the vendor-side actors with onsite experience are repeatedly being praised for their effort and their business understanding in front of their colleagues during the client-side visit at the OMC. This is certainly a very direct and public form of feedback. Additionally, I have witnessed several instances where the onsite-deployed vendor-side actors are thanked and praised for doing a good job in meetings at the client headquarters in Copenhagen. On other occasions, I have seen how client-side actors approach them for their input or help on specific matters. In such situations they are approached with sentences such as “I need

your help on this matter” or “Do you know how...” which clearly signals that their professional abilities are valued. But the way the client-side actors approach them also shows that they are treated as equals – that they are a part of the in-group (Kanter & Corn, 1994), which is also recognized by the vendor-side actors working onsite, themselves (Interview #5, #9, #10).

This sort of appreciation is of course not concrete feedback on their adherence to client-side values and norms, but rather related to their professional abilities. However, I argue that such direct feedback on value and norm adherence is seldom found, unless a previous and specifically noticed *lack* of adherence to such norms and values has warranted appreciation due to changed workplace behavior. Because norms and values are essentially invisible and taken-for-granted by the actors as long as these are not faced with alternate and disruptive norms and values, adherence will often not be consciously noticed and thus, adherence will not be explicitly recognized. Rather, group inclusion, can be interpreted as a sign of adherence to norms and values.

With regards to *rewards and sanctions* an offshore outsourcing engagement is characterized by organizational boundaries that by the virtue of the form of collaboration itself cannot be trespassed. Consequently, rewards and sanctions related to career development and monetary incentives are alone decided by the employee’s employer. Thus, the client cannot affect career progression or salary levels of the vendor-side actors – at least not directly. However, it is very likely that client-side praise of specific vendor-side actors has a positive effect on their career progression and remuneration. Thus, such praise can be regarded as an indirect reward.

Additionally, I argue that the onsite-deployed vendor-side actors are also directly rewarded as the in-group inclusion is a recognition of their ability to work independently and thus with more freedom, higher independent responsibility and less formal control as the quote below suggests.

“[A]t first when I came here it was all specifications and stuff. The reason is they [the Danish employees] did not know if I can do it or not, at the start, so it was all specifications and they asked me how many hours you need to do it, I need this, I need that, you need to do it fast, and stuffs like that. So as soon as I got it, I mean I came here and I started to interact with them and they saw how much we can do. Then it was like you can take how many hours you want.” (Interview #5 – vendor-side actor)

So far in this section I have been occupied with depicting how client-side actors perform normative control over the onsite-deployed vendor-side actors. Before moving on to look at ‘normative control of the far-away one’s’, I believe it is worthwhile to turn the question around and ask how the client-side employees *do not* perform normative control over the onsite-deployed vendor-side actors: As I have pointed out earlier in this section the vendor-side actors tend to keep to themselves during informal gatherings in the office. They take part without really taking a part so to speak. There is definitely a friendly tone between the actors, but they never have lunch together; the vendor-side actors never participate in out-of-office gatherings and they are not invited to the bi-weekly department meetings, even though the Danish vendor-side actors are taking a part in this.

With one notable exception – a project manager who, in his own words “work a lot on establishing personal relations [and have] invited them [the vendor-side actors] home” (Interview #1), everybody seems to be contempt to keep a certain distance – and thereby not take the next step into normative control.

Normative control of the ‘distant ones’

The collaboration between client-side and vendor-side actors stationed onsite is characterized by being informal and the vendor-side actors are perceived by the client-side actors as having a highly collaborative approach and by being responsible. The vendor-side actors stationed onsite are subjected to normative control, which is

evaluated by the means of the co-location itself, what Elsbach et al. (2010) would label passive face time. This corresponds well with the findings from Chapter V: ‘Challenged by Distance’, where I conclude that distributed collaboration is characterized by perceived difficulties in going directly, knowledge gaps and lack of transparency, as the actors engage in what Clark & Brannen (1991) would call *the least collaborative effort*. In other words, they keep communication across geographical boundaries at an absolute minimum and most of the time they do not engage in social interaction beyond common courtesies and they do not engage in each other’s work-life, but stick to agreed upon touch points of formal control. As a consequence of this mode of *least collaborative effort* the level of normative control that the actors are able to exercise upon each other is limited to standing phone meetings and client-side visits to the OMC. Below I will address these groupings of instances of normative control.

With regards to the *standing phone meetings* one could argue that these are in fact not an instance of normative control, but rather process control as the meetings follow a standard script with regards to who say what and when and as the meetings are instigated to evaluate and give feedback on process adherence (related to incident handling and change management, respectively). However, there is a certain element of normative control at play too. In the section on normative control of ‘the near ones’, I have elaborated how informality, collaboration and responsibility arguably are standard specifications of workplace behavior. During my observation studies I have noted how *responsibility* seems to play a central role in the standing phone meetings, while collaboration and informality only play a minor role. That is, the vendor-side actors who are perceived as ‘taking responsibility’ at the standing phone meetings are positively evaluated by the client-side actors, who also give feedback on the same by acknowledging these vendor-side actors’ contribution in public. An example of a positive assessment and the following public praise are the incident managers (Field Notes 20130911 – see also section on ‘Handling Critical Incidents’). In contrast is the

change manager who is perceived as lacking a sense of responsibility (see section on ‘The Change Management Process’). But beside these examples the standing phone meetings are by and large characterized by process focus, where each actor has a well-described role to fill.

Apart from the standing phone meetings the only form of normative control that the client-side actors engage in towards the vendor-side actors are during the client-side visits to the OMC. These visits typically happen twice a year, where a group of actors from the client-side spend approximately a week at the OMC. The main encounter between the client-side visitors and the non-management vendor-side actors are the meetings between the client-side actors involved in IT operations and representatives for the different functional areas (commonly referred to as ‘tracks’). In some cases these meetings are attended by the track lead and a few more members of the track, and in some cases all track members are joining – that latter only in cases where the team is quite small in terms of headcounts. During these meetings the vendor-side track lead and other meeting participants are invited to present successes, challenges and suggestions for improvements.

These meetings has a clear notion of normative control, where the client-side actors to a large extent impose their understanding on what “good” work is on the vendor-side actors, who are expected to show tokens of both collaboration and responsibility by the means of coming up with suggestions for improvements. A detailed analysis of these meetings will be given in the next chapter, ‘Trusting Across Cultures’, where I will show how these meetings, as instances of *presentational rituals* (Kunda, 1992) seek to impose the client-side workplace behavior on the vendor-side actors.

Adherence to the standard specifications as laid out by the client-side management is evaluated positively, whereas lack of adherence to this standard specification is evaluated quite negatively to an extent where the client-side actors in one instance “get furious” (Field Notes 20130502). It seems that the normative control performed during

these sessions is not withstanding as the client-side actor's experience that after returning home "it is the same old story as before we visited" (Interview #12). I speculate that this may be because the vendor-side actors are indeed receiving positive feedback on adherence to the standard specification, after their presentation, but there is no reward attached what so ever. That is, the client-side employees fail at showing that collaboration and taking responsibility, understood as adherence to standard specification, actually matter to them.

Control Mechanisms' Influence on Trust

So far in this chapter I have shown the client-side actors make use of control mechanisms. In this section I will discuss how the use of control mechanisms affects trust building and trust maintenance in the outsourcing collaboration. I will do so by applying a notion of control mechanisms as *substitutes*, *catalysts* and *inhibitors* to trust as described in the theoretical section of this chapter.

Control as a Trust Substitute

Throughout this chapter we have seen examples of formal control that suggest that control is indeed a substitute for trust. With regards to output control the SLA measurements, the monthly follow up on the same and the financial sanctions that are contractually put in place to ensure adherence to contractual agreements suggest that output control is a trust substitute. Actors from both organizations acknowledge the need for output control. One of the client-side actors with management responsibility considers the contractual underpinning of the outsourcing collaboration as "very important", while a vendor-side actor says that it is "extremely important" and adds that without contractual underpinning "any supplier would cut corners" (Field Notes 20140129)

The underlying assumption seems to be that while both parties agree that the partnership must be mutually beneficial, they are, at the same time inherently opportunistic. One example of this is the recent change in the number of onsite field

operators deployed by the vendor-side organization. As one of the vendor-side actors told me, the vendor has decided to cut down on these field-operators, whose purpose is to make sure that physical equipment, such as printers and network devices, are replaced or fixed in cases of failure. The consequence is, in the vendor-side actor's own words that "we may not be able to meet the SLA requirements" (Field Notes 20140129). However, due to the relatively high costs of having field operators stationed across Denmark ready to service the client's remote offices, the vendor assesses that it is a financially more sound decision to accept penalties for non-compliance with SLA requirements than to endure the running costs of having field operators. Thus, with regards to SLA measurements the assumption that the other party will act in an opportunistic manner, and thus is not to be trusted, requires adequate controls in place; control becomes a substitute for trust.

With regards to process control, the ITIL-based *standard specifications* are arguably also an instance of control as a trust substitute. The logic seems to be that an elaborate process framework warrants the dutiful performance of vendor-side actors. Thus, process control is a substitute for trust as standard specifications, evaluation, feedback and rewards and sanctions render trust in the vendor-side actors unnecessary. However, there is another aspect to this too: While rewards and sanctions related to output controls are aimed the organizational level, the rewards and sanctions related to process control are aimed at a personal level. In the analysis above I have shown how on one side the incident managers are *personally* rewarded with recognition based on a positive evaluation of the incident handling process, whereas the change manager as well the technician attributed the responsibility for 'the mother of all incidents' are *personally* sanctioned based on a negative evaluation of the their compliance with processes. That is, control can be a catalyst to trust insofar adherence to standard specifications is evaluated positively, and an inhibitor to trust insofar adherence to standard specification is evaluated negatively. In the following two sections I will take

a closer look at *control as a trust catalyst* and *control as an inhibitor to trust*, respectively.

Control as a Trust Catalyst

As argued above it seems that positive evaluations of adherence to standard specifications of process control are a *catalyst* for trust in the person that is perceived to embody the process. If we look towards prior theoretical findings, this is indeed interesting. Das & Teng (1998) argue that “the nature of formal controls is at odds with a trusting environment, which suggests a negative relationship between formal control and trust level” (p. 501), which leads them to propose that “deployment of formal control mechanisms will undermine the level of trust among partners” (ibid.). The analytical findings of this chapter, suggest that this is not so. Rather, control can, insofar adherence to standard specifications is evaluated positively, in fact be a catalyst to trust. By the means of the analysis of this chapter I have shown that process control can indeed be conducive to trust.

I argue that the same is the case with regards to output control, however with a different focus. In this particular collaboration the control mechanisms that are available to the client-side actors are never aimed at controlling *the individual* vendor-side actor, but rather aimed at controlling the vendor as a *collective*. Thus, whether output control of individual has a positive catalyzing effect on trust cannot be determined in this case. If we consider the effect of collective output control on trust in the collective it seems clear from observing the practices at the service delivery meetings, that output control at a collective level can also be a trust catalyst. Indeed, the output control mechanisms are maintained irrespective of the level of trust, but they do so, because they are contractually agreed upon and because they serve as the input to settle payments. However, from the meeting I have observed during the client visit to the OMC, where the client-side actors praise teams that are constantly “in green” (Field Notes 20130910, the client-side actors acknowledge ability and integrity. I argue

that this has a positive effect on trust, as lack of trust is more probable for teams that have a history of being “in red” rather than for teams that have a history of being “in green”. Thus, I do not find support for Aulakh et al.’s. (1997) argument that output control is negatively related to trust level – on the contrary, output control can also be a trust catalyst, insofar the measurements reveal a positive result.

In a similar vein I have shown how normative control can also be a catalyst to trust. This finding is in line with Das & Teng’s (1998) proposition that “deployment of social control mechanisms will enhance the level of trust among partners”(p. 501).

“In the beginning, as soon as they give us a specification, they say that it has to be done in like two-three days [...] otherwise there will be a breach, a fine [...] As soon as we gain some trust, I was able to say: “No, we need some more time”. And they say yes, they believe that [it is] reasonable and they agree to it.” (Interview #5 – vendor-side actor)

Thus, the normative control that is being performed on vendor-side actors stationed onsite is conducive for trust development. In the last chapter ‘Challenged by Distance’ I have argued that co-location is conducive to trust development; and in this chapter I have shown how co-location goes hand in hand with normative control. Thus, the client-side actors evaluate the onsite vendor-side actors on adherence to the client-side actors’ standard specifications of workplace behavior – that is, the expressed values of informality, collaboration and responsibility. Arguably, this normative control is an unavoidable companion to co-location. I propose that there are two different ways in which the normative control that accompanies co-location is a catalyst to trust development: First, co-location is conducive to an increased propensity to trust when the client-side actors acknowledge that the vendor-side actors “are like us”. Second, co-location is conducive to cognition-based trust when the client-side actors acknowledge that the vendor-side actors “work like us”.

‘You Are Like Us’

As soon as the vendor-side actors who are stationed onsite were moved into the client-side IT department to sit close by the client-side actors I experienced a change: From being ‘The Indians’ the onsite vendor-side actors were all of a sudden not anonymous resources anymore, but people with names. I argue that what is at stake here is a shift from perceiving them as resources to perceiving them as fellow human beings; someone one cannot overlook, as they are immediately present; someone who for the most part “are like us”: They come to work every day, they have lunch every day, they interact, they are approachable – in short “they are like us”.

In the next chapter I will unfold this argument in much greater detail and I will show how stereotyping (i.e. ‘The Indians’) is counterproductive to trust development. For now, I will merely claim that as the values to which the client-side actors advocate for are repeatedly evaluated as standard specifications to which the onsite vendor-side actors adhere to, by the means of co-location only, the client-side actors’ propensity to trust the onsite vendor-side actors will increase. Thus, co-location is conducive to an increased propensity to trust as the client-side actors, by the means of normative control acknowledge that “you are like us”.

‘You Work Like Us’

My second proposition is that co-location is conducive for cognition-based trust when the client-side actors acknowledge that the vendor-side actors “work like us”. It follows the same line of argument as above, however with a focus on how the co-located actors not only are closer together, but also *work* closer together. In ‘Chapter X: Passive Face Time and Active Trust’ I have shown how cross-locational collaboration is impeded by perceived difficulties of ‘going directly’, perceived lack of knowledge among the offshore vendor-side actors and perceived lack of transparency.

Furthermore, I have shown that these challenges are rendered obsolete when the actors are co-located. I have highlighted numerous examples on how the onsite vendor-side

actors are evaluated as adhering to the three standard specifications of workplace behavior, namely informality, collaboration and responsibility. These evaluations are the results of normative control *only*. That is, the onsite vendor-side actors are *not* evaluated differently when it comes to adherence to standard specifications of process control. In fact, they are not evaluated on adherence to the ITIL-based processes at all, but solely on their behavior at work. And finally, given the output control mechanisms' sole focus on organizational performance and not individual ditto they are no evaluated on output control either. Thus, co-location is conducive to cognition-based trust as the client-side actors by the means of normative control acknowledge that "you work like us".

Control as an Inhibitor to Trust

Finally, control can be an inhibitor to trust, which for instance is the case with the change management process where the negative evaluation of adherence to the standard specification has a negative impact on the change manager, who is perceived as not taking adequate responsibility. I have highlighted earlier how the incident managers are rewarded based on positive evaluation of process adherence – in this case it is the opposite: Negative evaluations leads to sanctions.

But there is another and more subtle way in which control is an inhibitor to trust: I argue that the standard specification of output, i.e. output control, even though mostly evaluated positively by the client-side actors are an inhibitor to trust. While the output controls do on one hand act as a trust substitute (as argued above) they are at the same time inhibiting trust as the very focus of the output control is on contract adherence. Such adherence stands in contrast to the values that the client-side actors perceive as central as 'responsibility' and 'collaboration' suggest something that exceeds mere adherence to SLA's. That is, output control effectively hinders the offshore vendor-side actors to show responsibility and collaborative efforts as the output control rigidly summarizes their effort into measurements that render the individual contribution of

offshore vendor-side actors invisible. These offshore vendor-side actors are faceless resources – a point I will address more thoroughly in the next chapter. Piccoli & Ives (2003) rightly claim that “by their very nature, behavior control mechanisms reward compliance with the given rules and procedures. As a consequence, teams are likely to pay significant attention to the requirements” (p. 368). I argue that this is not only the case for behavior control (that is, in my terminology: process control, ref. the theoretical section in this chapter), but also output control, which is in line with Gopal & Gosain (2013) who finds that “outcome-based controls are effective in addressing the outcomes of choice positively but have possible negative implications” (p. 344). In the same line of thinking Weibel (2007) states that “formal control seems to be a double-edged sword. It may complement trustworthiness and trust but can also have a harmful effect on employees’ trustworthiness and thus negatively affect trust” (p. 511), which indeed is the case here.

A Strategy of Intelligently Applied Control

“The best device for creating trust may be to establish and support trustworthiness [...] by applying the right form of managerial control in the right way, which is in a nutshell a managerial control based on participation and two-way communication” (Weibel, 2007: 513)

Conventional wisdom regards trust and control as two means to lower risk perception and increase confidence (Das & Teng, 1998). Control is seen as a token of lack of trust following a logic where confidence is seen as a constant, which can be met by a certain level of trust, or a certain level of control, or a certain mix of trust and control. Predominantly, trust and control are seen as each other’s substitute and if we, for some reason or another, do not trust, then we mitigate and gain confidence by controlling. Following this logic, control becomes a negative manifestation, which suggests that we do not, or cannot, trust. Indeed, we can probably all think of scenarios where we have been subjected to some form of control, which has evoked thoughts like “doesn’t she

trust me?” – indeed control is often perceived as something bad as “control mechanisms imply that one party does not trust the other” (Das & Teng, 1998: 501).

My analysis, however, shows that all forms of control – formal as well as informal – can indeed be a catalyst for developing trust. Therefore, I argue that abandoning the belief that control is bad and signals lack of trust is productive. Rather than seeing control as a display of lack of trust, we should consider control as a wish to establish trust. In line with Goold & Campbell (1987) I argue that control provides *transparency*, which in this case of offshore outsourcing, is one of the central problems in distributed collaboration; transparency with regards to work processes and with regards to commitment and proactivity. On one hand process control provides transparency into the work done by the vendor-side actors, which renders assessments of trustworthiness possible. In a similar fashion control of workplace behavior, when actors are co-located also provides transparency into work processes and thus renders assessments of trustworthiness possible. Furthermore control of workplace behavior transforms the vendor-side actors from being unknown to being known. They are acknowledged as individuals, they are made human. Throughout this chapter as well as the last chapter I have highlighted how important face-to-face meetings are to the actors. I argue that this is by and large because it makes the individual more transparent by the means of normative control, where the actors are able to show what “good behavior” is and observe that their counterpart actually conform to this and adheres to similar understandings of good behavior.

In line with Weibel (quoted above) I argue that the right form of control can support the possibility to assess trustworthiness. With regards to output control, I have shown how this is primarily done at a collective level, which is conducive for developing trust in the vendor-side collective’s ability to perform in a way that meets what is contractually agreed upon. However, at the same time – given the well known fact that *what you measure is what you get*, or put in more academic terms, paraphrasing Piccoli

& Ives (2003), control mechanisms reward compliance; and actors are therefore likely to pay significant attention to the requirements that the control mechanisms pose. That is, these output control mechanisms will inevitably make the vendor-side actors prioritize what is being measured, which – as I will show in the next chapter – can be a significant barrier to rendering positive assessments of trustworthiness possible.

Concluding Remarks

I set out to answer two questions in this chapter, namely 1) *how control mechanisms are used in the collaboration between client and vendor*; and 2) *how the use of control mechanisms affect client-side perceptions of the trustworthiness of vendor-side actors*?

My ambition was to capture a rich and nuanced picture of the use of control mechanisms. To accommodate this ambition I have established a framework in which both formal control – output control and process control – as well as normative control can be captured. Furthermore, with inspiration from Weibel (2007) I have operationalized the theoretical framework on control by a matrix structure in which the three forms of control (output, process and normative) depict ‘what’ is being controlled, while standard specifications; observation, evaluation and feedback; and sanctions & rewards capture ‘how’ control is being carried out.

By the means of this framework I have analyzed the use of control mechanisms in the collaboration between client and vendor. Subsequently, I have discussed the effect of these control mechanisms on trust and argued that in the empirical case control is in some instances a substitute for trust, in other instances a catalyst for trust and finally in some instances an inhibitor to trust. While it is well known that trust and control can be each others’ substitutes and also that control can inhibit the development of trust, the catalyzing effect that control mechanisms can have on establishment of trust is by and large overlooked. Thus, this chapter contributes with an implication to theory, as it shows that control can in fact be very productive in our quest to establish trust.

In the next chapter I will turn focus to the relationship between trust and culture. Arguably, there is a relationship between normative control and culture – and it is, among other things, this relationship I will shed light on in the next chapter.

CHAPTER VII: TRUSTING ACROSS CULTURES

Introduction

Culture. The word bears many meanings and associations. Within research culture has come to mean everything from something that separate one nation from another on a predefined set of dimensions – a view where Hofstede (1984) is arguably the most prominent exponent as “his concept of culture equates very strongly with the boundaries of nation-states” (Søderberg & Holden, 2002: 108) – to an interpretive understanding, where culture is understood as “shared or partly shared patterns of meaning and interpretation” (Søderberg & Holden, 2002: 112).

Within research on cross-cultural collaboration in virtual teams the interpretive approach that I adhere to stands in contrast to the majority of research efforts, where the primary focus is on generalized comparisons of national cultural differences. This functionalists approach is especially dominant within information systems research (Leidner & Kayworth, 2006) where national cultures are assumed to be homogeneous and relatively stable; and measurable according to a set of universally applicable value dimensions. Leidner & Kayworth (2006) have reviewed 82 articles on IT and culture within the information systems field and identify two streams of research, where the largest stream studies the impact of national cultures and predominantly relies on Hofstede’s five values dimensions (power distance, individualism/collectivism, uncertainty avoidance, and femininity vs. masculinity, short or long term time orientation) or other types of value dimensions, such as Hall’s (1976) notion of high-context cultures versus low-context cultures. The other stream examines organizational cultures; and does so by relying on generalized values too. Leidner & Kayworth (2006) conclude that only a few studies go beyond the study of values.

However, the heavy reliance on value dimensions does not stand uncontradicted. Leung et al. (2005) advocate the need to study how various levels of culture interact

dynamically to form and change a working culture and Brannen & Salk (2002) suggest that social interaction and the negotiation of meaning in global teams should be studied in order to understand the perceptions of culture and cross-cultural collaboration of the actors involved in global team work.

Jackson & Aycan (2006) suggest that cross-cultural researchers should depart with the functionalist research agenda and its heavy reliance on cultural values and rather adopt an interpretivists perspective. In line with Brannen & Salk (2002), Söderberg & Holden (2002), Jackson & Aycan (2006) and Marrewijk (2010) I adhere to such an interpretive understanding of culture. By adhering to this perspective I reject that we can look at dichotomies such as India/Denmark, client/vendor or IT-development/IT-operations as *a priori* constructs. This does not mean that I reject the possibility that for instance nationality may have a significant impact on the collaboration but rather that in order to understand if and how culture plays a role in the collaboration we must follow how culture unfolds in practice. That is, we need to construct an *a posteriori* understanding of culture and cultural differences by following how the actors make sense of each other, how they establish boundaries and construct in-groups and out-groups (Tajfel, 1981; Kanter & Corn, 1994). That is, we must make sense of culture as being embedded in practice and thus understand culture by the means of investigating how it is enacted in the concrete empirical setting. In the specific context of this thesis the term cross-cultural collaboration can thus be attributed many different meanings: It could be about the collaboration between Danish and Indian actors; it could be about collaboration between actors from two different entities; it could be about collaboration across professional cultures. It is potentially none of the above and at the same time potentially all of the above or something completely different!

The research question I aim to answer in this chapter reads: *How is vendor-side actors' trustworthiness affected by enactments of cultural boundaries?*

Before commencing one thing is important to note: In line with the interpretivists perspective I adhere to it is not the intention of this chapter to *explain* culture by establishing causal relations between culture and action. Rather, it is the ambition to *identify* the cultures and the associated values and interpretations in the empirical settings in order to achieve an understanding on *how* the cultural groupings specific to the empirical setting affect perceived trustworthiness.

In order to answer the question I will first attend to understanding how culture as a construct is enacted and subsequently relate this to trustworthiness. However, before attending to the research question an elaboration of the theoretical positioning I adhere to with regards to the term culture is needed.

Theoretical Underpinning

Culture: Essence or interpretation?

Scholars within organization studies have even been involved in so called 'culture wars' (Martin and Frost, 1997) between different paradigmatic approaches to the study of organizational cultures. Wars between 'functionalists' referring to cultural systems as 'essential' (Schein, 1985) and looking for 'basic assumptions and believes ... that operate unconsciously' (Schein, 1985) and 'interpretivists' understanding cultures as ongoing social constructions (Smircich, 1983) that can be studies using qualitative methods like interviews and participant observation (Kunda, 1992). (Søderberg & Holden, 2002: 107

As highlighted by Søderberg & Holden (2002) scholars within studies of culture have been engaged in a 'culture war' with functionalists on one side and interpretivists on the other. For instance McSweeney (2002), as a representative of the interpretivists view, has provided a substantial critique to Hofstede's dimensional view of culture. I shall refrain from going into detail on all of the five central points of critique that this

paper offers and merely agree to Söderberg & Holden's (2002) conclusion that "management academia and business consultants must break out of the dependence on Hofstede's survey and his cultural categorizations and rethink the theoretical and methodological foundations of international management in an increasingly interdependent, yet culturally diverse, business world" (p. 109). However, I would like to emphasize two central points for parting with Hofstede and "his evangelized entourage" (McSweeney, 2002: 27) view on culture. First, the presupposition that a nation-state is a homogeneous culture, which can be captured by the means of a handful of value dimensions, fails to grasp the complexities of culture. In the case of India a large body of literature (Anisya & Annamma, 1994; Chatterjee & Pearson, 2001; Singh, 1990) has stressed that India has many different cultures and is indeed "a complex mosaic of many languages, cultures and religions" (Marrewijk, 2010: 370) that is further complicated as the "traditional Indian values are changing in interaction with Western values" (ibid.). Second, the presupposition that culture is stable, which neglects human agency and thus reduce us all to "cultural dopes" as Garfinkel (1967) would say.

Söderberg & Holden (2002) take the contrary view: We are not cultural dopes, but rather humans with agency; and culture is to be understood as shared meaning and interpretation that are "produced, reproduced and continually changed by the people identifying with them and negotiating them in the course of social interaction. People's identification with and affiliation to a multiplicity of different cultures – for example national, ethnic, organizational, professional, gender and generation cultures – are thus subject to change, and boundaries between cultural communities become fluid and contingent" (Söderberg & Holden, 2002: 112).

By adhering to the notion from Söderberg & Holden (2002) that culture is inherently unstable I do not suggest that culture cannot have a stabilizing effect. Rather, I argue,

in line with Swidler (1986) that actors and culture must be understood as embedded into each other.

“Culture influences action not by providing the ultimate values toward which action is oriented, but by shaping a repertoire or ‘tool kit’ of habits, skills and styles from which people construct ‘strategies of action’. (Swidler, 1986: 273)

Swidler (1986) elaborates that such “strategies of action” are not strategies in a conventional sense, namely as a “plan consciously devised to attain a goal” (Swidler, 1986: 277), but rather “a general way of organizing action” (ibid.), which affect people’s actions and thus “people do not build lines of action from scratch, choosing actions one at a time as efficient means to given ends” (ibid.). Neither do they conform to a pre-defined set of values as a “culture is not a unified system that pushes action in a consistent direction. Rather, it is more like a ‘tool kit’ or repertoire from which actors select differing pieces for constructing lines of action” (ibid.). That is, culture affects people, and people affect cultures – we are not cultural dopes, nor are we hyper-muscular actors, whose actions, convictions, values and norms stand unaffected by the cultures we belong to.

How to Analyze Culture?

By adhering to an interpretivists’ understanding of culture one is faced with the challenge of ‘how to analyze culture’. Given the absence of predefined and readily available dimensions that can be quantified we must find other ways of understanding culture as it unfolds in practice – we must develop a terminology for understanding culture. In this chapter I will be analyzing culture by first identifying the *social constructions of groups* among the actors and subsequently by analyzing how *boundary objects* and *presentational rituals* influence cultural boundaries. Below I will outline the three theoretical constructs.

Actor-level Construction of Groups

If we are to take serious the break with the functionalist tradition in cross-cultural research we must – as mentioned in the introduction – also break with the notion that identify cultural dichotomies *a priori*. Consequently, we cannot for instance investigate cultural differences between an Indian and a Danish team or between a management and an engineering team without first qualifying that such dichotomous grouping is in fact present in the concrete empirical setting. Put differently, the mere fact that one group of actors has a different religion, a different socio-economic background and has been enrolled in a different educational system than another group of actors does not necessarily entail perceptions and enactment of cultural boundaries in the actual collaboration between these two groups. Thus, we cannot assume that cultural differences *necessarily* play a role in collaboration between for instance Danes and Indians. Therefore, any interpretivists' investigation of cross-cultural collaboration must depart from the actors' perceptions of cultural boundaries and not from presupposed categories. Even though a significant body of literature suggests that there are cultural differences between Europeans and Indians working together in knowledge intensive global teams (see for instance Krishna et al., 2004; Marrewijk, 2010) an interpretivists approach must take departure in the actor's own perceptions and only *a posteriori* construct cultural dichotomies based on identified cultural difference.

Arguably, there are two ways in which such an investigation can be conducted. One approach is to investigate the meanings and interpretations of what constitute good behavior, quality, a contribution, power, and so forth among the empirical actors; and based on this theoretically *a posteriori* construct cultural groupings. Another approach – and the one I am pursuing – is to investigate how the empirical actors construct us-and-them dichotomies (Kanter & Corn, 1994; Cramton & Hinds, 2005) – that is, groups – and subsequently make efforts to understand the actors' reasoning behind constructing these groupings.

In a recent article Jensen & Nardi (2014) follows how the actors make uses of the word culture themselves, when describing their daily collaboration. Their aim is to understand “how informal patterns of closure [are] enacted in cross-national collaboration” (Jensen & Nardi, 2014: 2) in an empirical setting that bears resemblance to mine as they also deal with offshoring of IT services, however to the Philippines and in a captive environment.

The method of analysis used by Jensen & Nardi (2014) arguably catches the rhetorical use of the term culture. However, if the research ambition is to understand how culture in a broader sense than the rhetorical use of the *word* culture, this analytical approach cannot stand alone as it does not recognize (and does not claim to recognize) that something that can reasonably be argued as being related to culture, can in fact be spoken of as something quite different by the actors. In their study, Jensen & Nardi (2014) conclude: “only Danish employees construct a cultural ‘other’, while Filipino employees spoke of problems of coordination, communication, and professionalism in their efforts to manage collaboration” (Jensen & Nardi, 2014: 12). In their rhetorical analysis culture is only culture if spoken of as culture. However, bearing the definition of culture that I subscribe to in mind – namely as “shared or partly shared patterns of meaning and interpretation” (Søderberg & Holden, 2002: 112) – we must conceive of culture as something more than a rhetorical construct. Specifically, as *groups*. Thus, in this chapter I will analyze culture as actor-level social constructions of groups by drawing on Kanter & Corn’s (1994) notions of *in-groups* and *out-groups*. Following this line of thinking one could potentially come to the conclusion that despite the fact that Jensen & Nardi’s (2014) Filipino interviewees do not speak of culture directly, they may in fact construct cultural dichotomies insofar they rhetorically present the coordination, communication and professionalism challenges as related to such groupings.

Therefore, to understand how cultural boundaries are enacted I will draw on inspiration from Jensen & Nardi (2014), but extend the scope of the analysis. My analysis is not a rhetorical analysis of the use of the word culture, but rather an analysis of how groupings are socially constructed and enacted among the empirical actors. Furthermore, after identifying such groups I will analyze how the actors' give meaning to these groups by focusing on the perceived differences between them.

Boundary Objects

In the literature review in Chapter V: 'Challenged by Distance' I have highlighted how collaboration across physical distance has been – and still is – considered a challenge to practitioners. Elsbach and her colleagues (2010) have shown how personal traits such as reliability, dedication, and accountability are assessed more positive when actors are co-located and in his cross-disciplinary review on trust in virtual teams and Berry (2013) concludes that the technological advancements over the last almost fifteen years since Olson & Olson (2000) published their widely cited article 'Distance Matter' has failed to eliminate the challenges that geographical distribution poses.

In Chapter V: 'Challenged by Distance' I have analyzed how distance affects trust building in an environment characterized by geographical distribution of actors, but I have done so with only limited focus on the artifacts used in the collaboration between the actors from the two organizational entities. Researchers within the fields of Computer Supported Collaboration Work (CSCW) and Human-Computer Interaction (HCI) have put studies of artifacts such as documents and web-based collaboration tools at the center stage; and according to Christensen & Bjørn (2014) it "is evident from this research that documents are woven into cooperative work activities as part and parcel of those activities, rather than as secondary tools where information is passively stored and retrieved" (p. 2452). Christensen & Bjørn (2014) continue by stressing that "[r]ecent studies have pointed out that documents are not to be regarded as isolated artifacts, but rather as intertwined in heterogeneous networks of actors,

activities, and other artifacts inherent to cooperative work practice” (ibid.). In a similar vein Barrett & Oborn state in their 2010 article on the use of boundary objects in cross-cultural software that the “practice of software development incorporates numerous objects including requirements specifications (specs) and project management methodologies” (Barrett & Oborn, 2010: 1200) aimed at bridging knowledge boundaries. The same can be claimed about IT-operations, where boundary objects are used in a similar way to convey knowledge, provide transparency and enable coordination.

Barrett & Oborn (2010) define boundary objects – a term originally coined by Star & Griesemer (1989) – as “mediating artifacts that have interpretive flexibility and can be an important means of achieving collaboration, promoting the sharing of knowledge between diverse groups” (Barrett & Oborn, 1200). Their aim is to “understand how and why their role and use may facilitate collaboration at one time and contribute to conflict at other times within cross-cultural software teams” (ibid.) by shedding light on how boundary objects “are brought to life through social interaction as diverse actors negotiate collective meaning through and around these objects” (p. 1204). That is, Barrett & Oborn (2010) perceive boundary objects as negotiated construct, rather than “ascribing the boundary object with essentialist properties” (p. 1204) and regarding them as “monolithic autonomous edifices” (p. 1200).

In line with Barrett & Oborn (2010) I argue, that by focusing on the actors perceptions of boundary objects and “the negotiations around the boundary objects as they are used in practice” (p. 1215) we can gain a more fine-grained analytical understanding of group formation and thus of cultural boundaries in the studied empirical practice as “[t]he creation and management of boundary objects is a key process in developing and maintaining coherence across intersecting communities” (Bowker & Star, 2000: 297).

Derived from their analysis of the use of boundary objects Barrett & Oborn (2010) corner the term *culturizing*, which signifies that boundary objects can reify cultural

differences which at the outset were identified by the actors but considered as unproblematic, but over time becomes challenging. That is, the boundary objects lead to cross-cultural conflict. Barrett & Oborn (2010) acknowledge the empirical limitation to their findings and urge researchers to draw on their theoretical approach to explore the meaning of boundary objects in other empirical settings (Barrett & Oborn, 2010: 1218). The ambition of this chapter is to do exactly that and by doing so gain a more elaborate understanding of the role of culture, than what can be done by the means of establishing an understanding of how groups are socially constructed by the involved actors.

Presentational Rituals

The third analytical construct I will use to understand culture as it unfolds in the empirical setting is *presentational rituals*. Kunda (1992) explained rituals as “a rule-governed activity of symbolic character which draws the attention of participants to objects of thought and feeling which they hold to be of special significance” (Kunda, 1992: 92) and elaborate that presentational rituals is thus gatherings “where the organizational ideology [...] is dramatized and brought to life” (p. 93). Such presentational rituals are “mechanisms through which certain organizational members influence how other members are to think and feel – what they want, what they fear, what they should regard as proper and possible, and, ultimately, perhaps, who they are” (p. 93).

By the means of my empirical observation studies it has become clear that Kunda’s construct of ‘presentational rituals’ has a significant explanatory power as the encounters between the client-side actors and offshore vendor-side actors, when these meet in person during the client-side actors visit at the OMC in India, is indeed characterized by an agenda of ritualized presentations.

However, in Kunda’s (1992) perspective ‘certain organizational members’ refer primarily to managers and his focal point is inter-organizational rituals. In my

empirical setting, where two organizational entities are interacting I will broaden the scope of Kunda's concept to understand how presentational rituals influences the actors in the other organization. I will do this by adhering to Kunda's (1992) three types of presentational rituals, namely 'talking down', 'talking across' and 'talking around'. In Kunda's intra-organizational perspective 'talking down' represent rituals where a manager is engaging with subordinates; 'talking across' are rituals where members of one part of the organization engages with members of another part of the organization; and 'talking around' represent rituals where peers interact with each other, such as work group meetings.

From the outset inter-organizational rituals are best understood as 'talking across'. However, I argue that even though for instance the CIO from the client organization has no formal power over operational staff from the OMC, he is considered to be 'the boss' by them. Thus, when the client-side actors address the vendor-side OMC staff I see it as a 'talking down'. This argument of power will be unfolded later in this chapter.

Researching Trust in a Cross-Cultural Perspective

"Is there a universally applicable model of trust and trust development [*etic*], or do people from varying cultures understand and enact trust differently [*emic*]?" ask Dietz et al. (2010; 7) in the introductory chapter to Saunders et al. (2010) book on 'Organizational Trust – a cultural perspective'. Despite the title of the book there is to a large degree a focus on national culture, where organizations from different countries – Germany and Ukraine, France and Lebanon, Nigeria and Ghana, Germany and USA, and finally Turkey and China – are compared with regards to various aspects of trust. Out of eleven empirical studies in the book, five has a significant focus on the differences in national cultures. Despite this the authors claim that they "do not see cross-cultural engagement as being limited to *national* boundaries. Mergers, strategic alliances, joint ventures and outsourcing arrangements bring people together from

different *organizational* cultures” (Dietz et al., 2010: 6). While some authors adhere to a universalist understanding of culture other see culture as a social construction and the conclusion from the final chapter, that some research find that, for instance, the trustworthiness characteristics “are universally applicable, there are also culturally specific unique manifestations and interpretations of these characteristics in at least some countries” (Saunders et al., 2010: 409).

By taking into account the epistemic stance of social construction I adhere to in this thesis, where culture is defined as patterns of meaning and interpretation that is, to some extend, shared among its members I argue that the potential to develop an universally applicable model of trust and trustworthiness cannot be rule out, but that it is however highly unlikely. If meaning and interpretation as such is socially constructed among members of a culture, it seems improbable that meanings on what constitute trustworthy behavior are universally applicable. Thus, when researching trust and trustworthiness across cultures we must keep an eye on the possibility of diverse understandings of these constructs. Therefore I argue in the lines of Wright and Ehnert who propose that “because trust is dynamic rather than fixed or stable, it should be framed as a social construction” (Saunders et al. 2010: 410).

Regarding trust as a dynamic, negotiated and pluralistic construct introduces a number of complexities: First, if meaning is socially constructed and words are recontextualized (Brannen, 2004) the word trust itself is bound to have different meanings in different contexts. The multitude of definitions introduced over the years bear witness to this. As stated in the theoretical framework (Chapter II) I adhere to the widely adopted definition from Rousseau et al. (1998) where trust is understood as “a psychological state compromising the intention to accept vulnerability based upon positive expectations of the intentions and behavior of another” (Rousseau et al., 1998: 395). As elaborated in the methodological chapter (Chapter III), I have attended to this by consequently refraining from asking about ‘trust’ and ‘trustworthiness’ during

interviews and informal conversations with the actors. Rather, I have focused on their expressed accept of vulnerability to other parties and their assessments of other's intentions and behavior.

Second, if meaning and interpretation is socially constructed, it is also highly probable that the characteristics of trustworthiness vary across cultures. While ability, integrity and benevolence after Mayer et al. (1995) has been widely recognized as antecedents of trust and characteristics of trustworthiness, there are indeed research that suggests that these characteristics can vary across cultures. For instance, Tan & Chee (2005) reported that in Confucian settings filial piety, diligence, effort, harmonious relationship in office, humility and magnanimous behavior are significant characteristics of trustworthiness.

However, I argue that while there may be more trustworthiness characteristics at play in given cultural settings, the three “base characteristics” will always be present given the definition of trust I adhere to (which I have argued for in Chapter II). Put differently, the relationship between ‘behavior’ and ‘intention’ on one side (ref. the definition of trust) and ‘ability’, ‘integrity’ and ‘benevolence’ on the other side is quite close. ‘Behavior’ can be understood as someone’s ability in conjunction with consistent adherence to principles that guide action (integrity); and on the other hand ‘intention’ can be understood as a trustor’s positive orientation towards a trustee, which is benevolence (Dietz et al., 2010: 10). However, this does not rule out that there may be more characteristics of trustworthiness than these three that have significant impact in various cultures. Thus, the ABI-characteristics are arguably universally present *as they are tied to the definition itself*, but may be supplemented with other culture-specific characteristics.

Third, trust is arguably always context dependent and actor’s propensity to trust does – as argued in Chapter II – also influence trust building. Thus, when analyzing how culture influences perceived trustworthiness we must look for what they take for

granted, what is undisputed, what is regarded as bizarre without further argument – in other words: we must look for the actors’ propensity to trust, as something shaped by their cultural belongings; their meanings and interpretations.

Understanding Actor-Enactments of Culture

In the previous chapter I have analyzed how control, formal as well as normative, affects trustworthiness in the empirical context of the offshore outsourcing between the client and the vendor. In that chapter I stated that I would be looking at control primarily as something that the client-side perform on the vendor-side, given the nature of the collaboration, where the vendor are delivering services to the client in exchange for money. This perspective naturally suggests two distinct groups, namely on one side the client-side employees and on the other the vendor-staff employees. However, such a perspective only accounts for group formations that are related to legal and organizational boundaries, insofar the vendor and the client are indeed two separate legal and organizational entities that are formally connected by the means of contractual obligation.

In this chapter I will take a closer analytical look at groups as the actors socially construct them. Such groups are not confined to being of a legal or an organizational character. In fact, the social constructions of groups offer additional perspectives than the underlying understanding of groups that were presupposed in the last chapter. However, this does not mean that the grouping related to organizational boundaries is artificial. On the contrary, the actor’s repeatedly construct this grouping verbally – it is just not the *only* grouping that is being talked about.

After analyzing the patchwork of social constructions of groups I will take a closer look at how presentational rituals and boundary objects influences cultural groupings. Finally, I will connect the analytical findings on culture to the overall research agenda trust in globally distributed IT teams.

Social Constructions of Groups

National Stereotyping

I started this chapter by arguing in the line of Söderberg & Holden (2002) that culture should be understood as shared meaning and interpretation and as something that dynamically changes over time as it is affected by human agency. This view of culture stands in stark contract to the functionalist understanding, where culture to a large extent is seen as synonymous with national states.

Arguably, Hofstede (1984) has made a significant impact on how culture is defined and understood – and this both within academia and (perhaps to an even greater extend) within practice. In the empirical context I am researching I have repeatedly experienced such national stereotyping among the Danish actors, but interestingly, only to a very limited extent among the Indian actors. Throughout my interviews and informal conversations the Danish actors have repeatedly brought up the notion of cultural without me prompting the subject; and when they start talking about culture, it is always as something that has to do with national or regional differences. Not organizational differences, not professional differences, but differences referring to “the other’s” as Indians or, in a few cases, Asians.

When I started my empirical field work at the client’s head office in Copenhagen, the actors were told that I was researching ‘global collaboration’, which prompted several of them to talk about national culture. Below are a few excerpts from my field notes from the first three weeks:

- He explained that the Indian work culture is more hierarchical. I asked how this manifested itself and he explained that Indian managers micro-manage in the sense that for example a technician does not have “the full picture”, but rather works on specific instructions from his manager. He noted that this is very different than how Danes work, where people are not micro-managed. (Field Notes 20130212)

- She told me that he was a really good guy, with a very western approach, and that he had been working in the UK for years. She added that he was the sort of guy they feared to lose, because he is very talented. (Field Notes 20130212)

- He told me that the manager of the OMC is about to change to a new job. This piece of news is circulating in Denmark now, but for some reason, he told me, HCL won't let this out before last minute. He speculated that it is a significant difference between the way Danish and Indian organizations function. He said that in Danish organizations one would typically make such things public as early as possible, while in India it is done last minute. (Field Notes 20130214)

- She is on the phone and is explaining someone that the problem with Indians is that they are not approaching the problems head on. "They always deflect", she says. (Field Notes 20130221)

Throughout my observation studies I have encountered several such situations, where something the Danish actors have observed about the vendor-side organization and employees, which stands in contrast to their own way of working, is generalized as "a national cultural feature". Interestingly, only one of them has previous experience in working with Indians, for all others the collaboration with the vendor is the first time they are experiencing working with Indians. Despite this, the cultural stereotyping is commonly used among the Danes and the themes are reoccurring. First, Indians are perceived as more hierarchical, where employees are micro-managed and receive specific instructions from their manager that are not questioned. As a consequence of this Indians are perceived as being re-active and not pro-active, as the Danish actors perceive themselves to be. Second, Indians are perceived as collectivists, who, according to a Danish actor, do not possess "the same kind of feeling of personal responsibility, as we do in the west" (Interview #04). Third, Indians are perceived as very concerned with maintaining a harmonious relationship and will avoid conflict at almost any cost. In the words of one of the Danish actors Indians will always "say yes, but if you listen carefully, you know that it is an '*evasive yes*' [...]" it is more important

to keep the good relation [than to say no], I have experienced that many times” (Interview #3). Consequently, it is perceived as necessary to escalate issues immediately as lack of progress can be a sign of such an ‘evasive yes’. The quote from the client-side CIO sums up the national stereotyping very well:

Clearly, it is a strength that the employee on the floor in Denmark will not accept: “this is not your responsibility, do not think about it, just do your work”. It is built in to our society that each and every employee has a high capability of abstraction and insists on being involved in decisions. [...] They have an opinion, and they are not afraid to voice it. And I encourage them to do so. This is not the way it is in India, because in Denmark the individual is important, which it is not in India [...] The individual cannot be important there [in India], there are simply too many of them [Indians].
(Interview #04 – client-side actor)

From the outset of the outsourcing collaboration the client organization have had a focus on cultural challenges related to working with an Indian vendor. The client-side CIO, who bears the overall responsibility for the outsourcing contract, explains that:

“What we did, before we started in both the Netherlands and Denmark, was to hire a consultant, a Danish girl living in India, to do workshops with the employees with most contact with HCL and a few from the business side too. In the first workshop, attended by approximately twenty people, she [the consultant] explained the [cultural] mechanisms. [...] At that workshop many learned to ‘sit on the other side of the table’ and learn a bit about how these people think and what their frame of reference is. [...] We had a lot of benefit from that workshop” (Interview #4 – client-side actor)

The workshop was repeated again after I started doing my observation studies and I had a chance to participate as an observer in the session, where fourteen people from

the client organization and two native Danish vendor-side actors participated. From the outset the consultant conducting the workshop asked what the participants expected to gain from participating in the workshop and most answers were in the line of “understanding Indian hierarchies”, “understanding the world they live in, their religion and family structure and relations”; when does yes mean yes and when does it mean no” (Field Notes 20130301). That is, from the outset the expectations were about gaining generalized knowledge about India and Indians.

The consultant presented trivia about India: size, population, religions and languages first and then moved on to talk about what she herself called “tendencies in Indian work culture” and using the likes of Hofstede (1984) and Trompenaars & Hampden-Turner (1997) to support the claims. While she did make an effort to stress that she was painting a generalized picture and that this did not mean that all Indians conform to these categories; and furthermore elaborated that cultures are not stable, but can be affected by human agency, the participants agenda seemed to be to get exactly that generalized picture of how Indians are and how they work. It seemed to me that the participants used the workshop to air frustration and to get one-size-fits-all tools to use in their daily collaboration with Indians, which was partly (and I expect, unintentionally!) catered for by the consultant who repeatedly invited for dichotomous views on the collaboration, by asking questions such as “how is the hierarchy different in Denmark and in India” (Field Notes 20130301). That is, even though I suspect that the purpose of the workshop was *not to* convey cultural stereotyping as an appropriate way of intellectually dealing with cross-national collaboration, this was exactly what happened: The client-side actors were confirmed in their stereotypical view of cross-cultural collaboration.

In contrast to the Danish client-side actors, the Indian vendor-side actors do not engage in national stereotyping of culture. Those who have gained international experiences working with client organizations from other countries than Denmark reflect on how

working with this client is different, but they do so without stereotyping. This does not mean that they do not reflect on the differences they experience, but rather that such experiences are conveyed as exactly that – *experiences*. For instance, a vendor-side actor with significant onsite experience tells me that:

“I have been working with multiple clients and I find the people from Copenhagen or Denmark quite calm. [...] Compared to earlier [where] I have been working with a German client and the US. There the work pressure is more, but now here you should not feel that you are pressurized and I feel very comfortable working here” (Interview #09 – vendor-side actor)

During interviews I have repeatedly asked if the vendor-side actors had experienced challenges in their collaboration with the client-side actors. Some of the Indian vendor-side actors express, in line with the quote above, that they are pleased with working with the client-side actors as it is characterized by a relaxed work atmosphere and freedom to work independently, while other’s express that they initially were surprised by the very direct and sometimes almost rude mode of communication. But unlike the client-side actors, the vendor-side actors never seem to generalize. It is never “*Danes* are very direct”, but rather “*he* is very direct”. Furthermore, such claims are never attributed to culture, but rather to communication. In fact, when I have tried to bring the topic of culture to the table by specifically asking about cultural challenges, the vendor-side actors without onsite experience generally reject that there are any cultural challenges, while the vendor-side actors working onsite relate to the question as a personal matter, as something not attached to their work. They talk about how the food is different in Denmark, how public transportation works, how expensive commodities and food is, and how it is difficult to adapt to the cold climate in Denmark. Thus, national stereotyping seems to be something that only the client-side actors and the

native Danish vendor-side actors engage in. Thus, the social construction of a group based on national stereotyping can be illustrated as in figure 7.1 below.

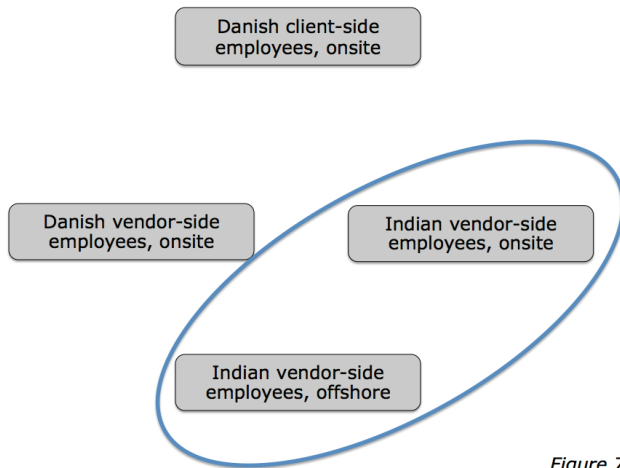


Figure 7.1

Group by Organization: Vendor vs. Client

In the case of national belonging only the native Danish client-side actors engage in group-constructions based on national stereotyping, but how about organizational groupings? As mentioned earlier, the last chapter ‘Flipping the Switch on Trust and Control’ presupposed two distinct groups separated by organizational boundaries. Are such groups merely *a priori* constructed or are they enacted as social constructions of groups too? Unlike the case with national grouping, actors from both organizations construct us-and-them dichotomies of ‘client’ and ‘vendor’. However, there is one notable exception, namely the vendor-side actors of Danish origin. I will return to this particular group later. For now the focus is on the *Indian* vendor-side actors on one side and the client-side actors on the other.

When interacting with the vendor-side actors, it becomes clear that the notion of ‘the client’ bears significance to them. During interviews I have repeatedly found that this “significant other”, the client, is at the same time a dichotomous construction of us-

and-them and at the same time somewhat symbiotic, as the vendor-side actors are acutely aware that the, as a service provider, is dependent on ‘them’ as a client. One of the vendor-side actors explain his job like this:

As a service provider it is also a part of your job getting to know them [the client] and their mindset and their culture and then you have to modify yourself a bit and then you need to do your service. So, if he [the client] will be happy, I will be happy”. (Interview #10 – vendor-side actor)

The vendor-side actors define themselves as ‘the vendor’, but focusing on the other side, the client side. Another vendor-side actor explains “you are not representing yourself here” (Interview #09) and elaborates further on the symbiotic client-vendor relationship:

I should give respect to the client who is giving work to me and I should respect [the vendor organization] who is paying me for working there. So when you start talking or when you are working with the people, you should always keep in mind that your parent company and the client both should be happy with your things. [...]We always try to compensate or balance the things. (Interview #09 – vendor-side actor)

During my interviews with vendor-side actors, there are four words that are repeatedly mentioned in connection with the client-vendor relationship: Service, respect, understanding and adaptation. That is, they perceive that in order to provide a high-quality service to the client, they need to respect the client and the client’s needs; and they need to understand the way the client-side actors communicate, how they work and what their values are and they need to adapt themselves to the client-side’s way of working. You need to “modify yourself a bit” (interview #10), or as another one puts it: “they [the client] are the ones who is sponsoring this, so I have to adapt” (Interview #05) and another explains how she changed the way she works, after arriving in

Denmark: “I saw the way the people are working, so I similarly started molding myself to work like that” (Interview #09)

The client-side actors construct the client-vendor dichotomy in a similar way. Among the client-side actors there is a clear construction of ‘a them’, the vendor and ‘an us’ the client, where the vendor is expected to deliver services according to contractual specifications and agreed-upon processes. Thus, the notion of ‘service’, which has been brought up repeatedly by the vendor-side actors (as explained above) is similar in the eyes of the client-side actors. With regards to understanding and adaptation, several client-side actors have expressed that they “don’t understand the hierarchy and who to talk to” and that they “do not know the [vendor’s] organization” (Field Notes 20130301). Many of the client-side actors express that they “don’t have a team” (Field Notes 20130301), signifying that they perceive a lack of unity between the vendor-side and the client-side, which arguably enhances to us-and-them distance. Also, as one of the client-side managers told me there is a clear feeling of us-and-them with regards to task distribution and helpfulness: The client-side actors rigidly adhere to understandings of ‘what is your job and what is mine’. The manager explains that he had urged some of the client-side actors to help the vendor-side actors to which the other client-side actors answered “why should we do their job” (Interview #03), to which the manager argued that against the silo approach and stressed that “your job is really to make sure that the overall collaboration runs smoothly” (Interview #03). However, the client-side manager assesses that the silo thinking is very predominant.

At the aforementioned culture workshop one of the native Danish vendor-side actors explained that the vendor organization is deeply engaged in Corporate Social Responsibility activities and gave a few examples. A client-side employee assessed that “It’s good to hear that [the vendor] has such a good profile. I am happy to know that, but I would have appreciated to know that before”, which all the other workshop participants agreed to. Thus, the group construction of ‘the vendor’ is not as strong

from the client-side, as the group construction of ‘the client’ is from the vendor-side actors’ perspective. Rather, the client-side actors tend to talk in more generalized terms about ‘the Indians’.

With regards to adaptation to the vendor’s way of working, there are different opinions on the client-side. Some are critically stating that adaptation to for instance another work culture that “it is not us who are supposed to work on this. They are the supplier” (Field Notes 20130301), while others have a more accommodating approach, where it is acknowledged that “we need to support [the vendor] to add value” as one of the managers explained it at one of the steering group meetings (Field Notes 20130501). Another client-side actor elaborates:

“We have a situation where we have this vendor and we cannot change that. So, we must get the best out of it and we don’t do that by being stubborn. We do that by trying to meet people where they are. It would surely be great if they just understood everything, but that cannot be expected. There are two sides to collaborating and we have an equally big obligation to understand how they work as they have to understand how we work” (Interview #06 – client-side actor)

As stated earlier the Danish vendor-side employees are a notable exception to the otherwise clear-cut us-and-them dichotomy with ‘the client’ on one side and ‘the vendor’ on the other. On one side these native Danish vendor-side actors acknowledge that they are a part of the vendor organization, on the other they have historically been employees of the client organization, before the first outsourcing wave in 2007, where they were transferred to the first outsourcing partner. When the current vendor took over, these employees were transferred and at the same time they moved back in to the client’s headquarters. During the first outsourcing contract they were situated at the at-that-time vendors premises, physically detached from their old colleagues from the client company – now they are back. Their historical relations to the client-side actors;

their long-lasting affiliation with the IT-department in the client organization; their knowledge of the business and the IT-platform; their network; and their shared mother tongue and personal friendships with the client-side actors brings about a close affiliation with the client organization and its employees.

During one of my first interviews, I asked one of these native Danish vendor-side actors how he would characterize his relationship to the client organization – whether it was that of an employee or that of a vendor. He reciprocated like this:

“Hehe, I ask myself that too from time to time. Some [of the client-side actors] would say that it is a very collegial relationship – and in many ways it is. But there is no doubt that it is a client-vendor relationship, however with a deeper insight into the other organization and more openness than if I was an external hire – if I didn’t have relations within the organization. [...] Uh, it’s a difficult question. What is a client-vendor relationship at all? I believe I have some prerequisites for being much more collegial, but when we moved back here [the Director of IT-operation in the client organization] said that they would like that we [the Danish vendor-side actors] become a part of the department and colleagues on same terms as the rest. I told him, well I didn’t, but I do not believe that this will ever happen because at the end of the day we are external hires. Okay, we are participating in the department meetings and from time to time we go out for a beer with them [the client-side actors] and we are invited to all such things; and we do get all sorts of information that a supplier normally wouldn’t. I mean, I can hear them when they are negotiating with [the vendor]. I can also hear them when they negotiate with third parties. They are standing right next to my table, right – and they are speaking openly about how negotiations progress and how they plan on handling it [...] it is a question of how I act on it. If I were to interfere every time I heard something or give input from a [vendor-side]

perspective on for instance department meetings – well, I can do that some times, but it is really important to know the ‘visiting hours’. One thing is to hear something, but if it is not appropriate I should not interfere [...] It is also important that I don’t pass on everything I hear [to the vendor-side colleagues]” (Interview #02 – vendor-side actor)

According to this native Danish vendor-side actor there is a collegial feeling between him and the client-side actors, but that the same time they are not, given his organizational affiliation, real colleagues; and to balance this requires *fingerspitzengefühl* – that is, great situational awareness, and the ability to respond most appropriately and tactfully in situations where he gains privileged information, that is normally not available to vendor-side actors. At the same time the Danish vendor-side actors have an organizational affiliation with the vendor. However, this affiliation is repeatedly described as very superficial. The native Danish vendor-side actors feel that they are forgotten:

“They are clearly forgetting us [...] sometimes I call the bosses and tell them to remember us. Then they reply that they agree they should involve us more; remember to communicate and set up weekly information meetings. Then I say, ‘listen, why don’t you just invite me for the internal meeting we have in [the vendor organization]’, because there are such internal meetings. I doubt that people never communicate, right! [...] I am involved in some monthly meetings, some internal meeting, but not nearly enough. And I try to fight my way in” (Interview #02 – vendor-side actor)

Another native Danish vendor-side actor explains that he is challenged by lack of insights into how the organization works and that he does not know “how the Indian way of working is and that’s a bit of a downside for me because they seemingly is a hierarchy, but nobody is really willing to tell exactly how the hierarchy works and who’s above, who in it because initially when it started off they all seemingly were on

the same level, but I am slowly working out that that person is slightly more senior to that person. So now I'd like to know! [...] When I'm on the phone, there's usually one guy who takes control. So I'm assuming that he is the leader figure of these boards" (Interview #07). Thus, the organizational hierarchies are unfamiliar to the native Danish vendor-side actors, who further more adds, with a spark of sarcasm that the lack of such knowledge "does present unique challenges" (Interview #07) and the fact that one of the Danish vendor-side actors have visited India combined with the vendor organization's lack of presence in terms of administrative functions in Denmark, at the time when they were transferred to the vendor, meant that "getting into the company was a strange experience" (Interview #7). From informal conversations it has become clear to me that the Danish vendor-side employees do feel a responsibility towards the vendor organization as an employer, but do not feel as a part of the organization. This was made even clearer when I attended a birthday celebration in the IT-department a little before summer vacation: While eating a slice of cake I talked with another native Danish vendor-side actor about holiday plans. He told me that he would be working most of the summer and that he would be "the only [vendor-side] employee at work" for a two-week period as the rest were on holiday. I asked him if all four of the Indian vendor-side actors would go on holiday too, to which he replied: "Oh, I forgot about them. I don't know. They will probably be in [office]" (Field Notes 20130613). That is, he forgot about the four vendor-side colleagues sitting less than ten meters away from his desk.

Thus, the construction of groups based on organizational affinity can be as done in figure 7.2 below. The red circles illustrate the stable groupings of client and vendor respectively and the dotted circles depict the weaker groupings constructed by the Danish vendor-side employees.

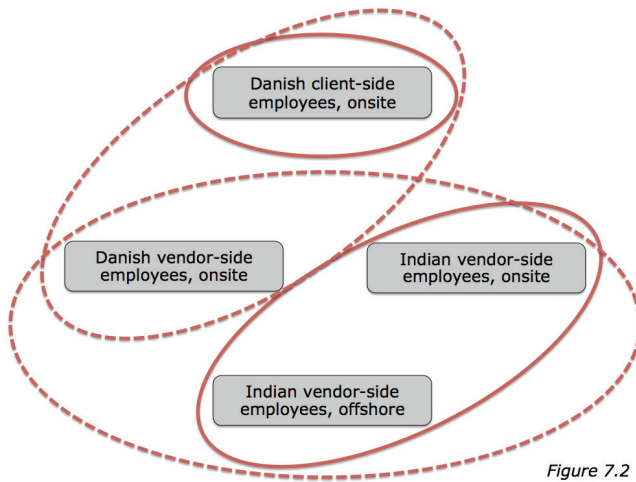


Figure 7.2

Group by Location: Onsite versus Offshore

In addition to construction of groups based on national stereotyping and organizational affiliation respectively, the client-side actors together with the vendor-side actors who are working onsite engage in group construction on another dichotomy based on geographical distribution, namely that of onsite versus offshore actors. As I have argued in Chapter V: ‘Challenged by Distance’, the cross-locational collaboration is characterized by three challenges. First, the actors find ‘*going directly*’ difficult: That is, the actors find approaching their counterparts from the other organizational entity difficult, when they have not met face-to-face, as encounters in physical proximity facilitates communication and social interaction, which helps the actors to get to know each other. Consequently, physical distance becomes mental distance.

Second, the collaboration is challenges by lack of knowledge among the offshore actors, who, according to the client-side actors, require much help in performing tasks they should be able to solve by themselves. The offshore vendor-side actors are constructed as a group of expertise-seeking novices, by themselves as well as by the

client-side actors. In contrast, the onsite vendor-side actors are repeatedly acknowledged for their abilities to understand the core business of the client company.

Third, among the client-side actors there is a perception that “things are just hidden or ‘forgotten’ if they [the vendor staff] don’t know how to solve them” (Interview #06) and thus they feel that there is a *lack of transparency* of what the offshore team is doing, whereas the collaboration between client-side actors and onsite vendor-side actors is characterized by ongoing interaction and consequently by significantly more transparency.

These three challenges of cross-locational collaboration has a significant impact on the collaboration, as the onsite vendor-side employees are used boundary spanners and gate keepers (which will be the topic Chapter VIII: ‘Spanning the Trustworthiness Boundary’) and arguably the differences in social interaction and levels of business knowledge can be seen as a social construction of groups: On one side, the knowledgeable onsite staff and on the other side the offshore expertise-seeking novices – a perspective which is shared among both the client-side actors, the onsite vendor-side actors, the offshore vendor-side actors and furthermore stressed by the vendor-side management, who point out that onsite vendor-side staff should not attend to lower priority and trivial tasks (Field Notes 20130910).

Consequently, the onsite vendor-side staff become included in the group of the ‘knowledgeable few’ as they “gain understanding of our systems and our business” (Interview #04). The social construction of the onsite group can be illustrated as in figure 7.3 below.

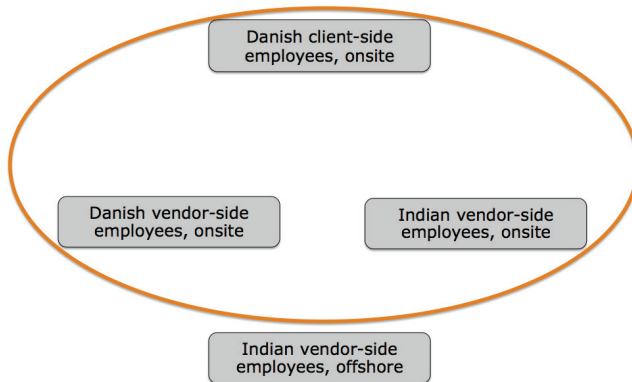


Figure 7.3

Establishing Unity: We are in it Together

So far I have looked at three different instances of social constructions of groups. All three have one common denominator, namely that the constructions both include and exclude actors in the groups. The last social construction of groups I will elaborate on differs from this, as it only seeks to include, not exclude.

“I am much more cold and calculative” (Interview #4), the client-side CIO told me. “I need them [the vendor] to deliver and if I need a favor, I need them to be flexible and not just adhere to the contract. That’s about relations. When it comes down to it, it is all about relations” (Interview #4). From my previous encounters with the CIO, I know that he has a dry sense of humor and that the staging of himself as cold and calculative is more of a humorous remark. Nevertheless, the agenda of the client-side visits to India is indeed to establish relations. Several of the client-side actors told me about their expectations and reasons for visiting the OMC in India. One said that his “expectation is, obviously, to get a better relations to the people I work with” (Interview #15), while another elaborates that “just to come down and meet people, to put faces on those you don’t know and meet those you know again strengthens the relations and thereby also the collaboration that follows. That, to me, is one of the most

important reasons to go out there and visit” (Interview #12). This perspective on the fruitfulness of client-side visits to the OMC in India is shared among the offshore vendor-side actors. One assesses the value of client visits like this: “That’ll reveal transparency between both of us and build trust. Their visits here, meeting in person, it’s nothing but building trust” (Interview #23). Another assesses that “very good rapport we can create with them” (Interview #20).

According to the actors from both the client-side and the vendor-side such client visits to the OMC in India help establish relations, build trust and create rapport, which according to several of the client-side actors as well as vendor-side actors has helped established a collaborative environment, where it is less “yes, sir” (Field Notes 20130911) and more equal; where the Indian vendor-side actors are comfortable talking to the client-side actors and voice their opinion. I characterize this grouping as *establishing unity*. That is, establishing a feeling of being in it together, which can be depicted as in figure 7.4 below. After summing up the findings on social constructions of groups I will re-attend to this notion of establishing unity and look deeper into how it is done by focusing on how presentational rituals are enacted during these visits, as well as in situations characterized by ‘being business as usual’.

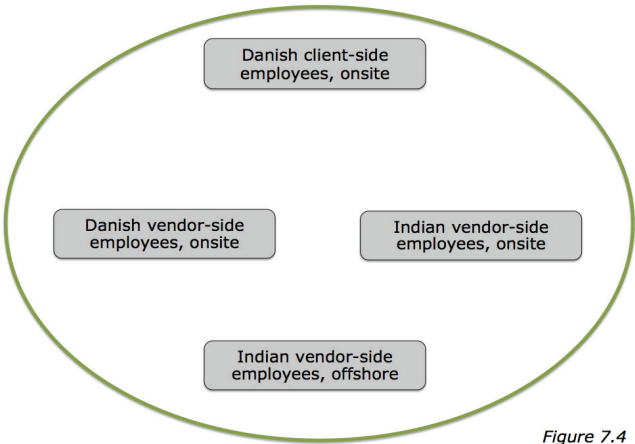


Figure 7.4

Summing up on Social Constructions of Groups

In this section I have elaborated how groups are socially constructed in the collaboration between the client and the vendor. Together they form a complex picture of groupings. One may argue that the four ‘boxes of actors’ too are groupings, which I have not accounted for. This is true. Within both the client-side actors and the offshore vendor-side actors there are indeed subgroups, for instance on the client-side ‘development people’ and ‘operations people’. Similarly, within the group of offshore vendor-side actors, there are several constructions of groups linked to professional occupation and work domain areas. There are constructions of groups that spans two or more of the ‘boxes of actors’. For instance, there is a construction of a SAP group that spans across the client-side actors, the onsite vendor-side actors and the offshore-vendor side actors. And there is arguably a social construction of a management group, which spans across all four ‘boxes of actors’.

Thus, the picture of social constructions of groups is indeed even more complex than what I have presented so far. However, I have chosen not to include the abovementioned social constructions of groups as well as others for one simple reason: They do not appear as strong social constructions as the ones I have described – they have proved to be less relevant. Thus, the ‘boxes of actors’ that I have chosen are the results of how the actor’s themselves are constructing their reality.

The significant groupings I have identified are illustrated in figure 7.5 below: A complex pattern of several social constructions of groups, which together paint a picture of an interwoven patchwork. In the following section I will, first, re-iterate on how such groupings can indeed be regarded as enactments of culture. Subsequently, I will shed light on how presentational rituals on one side are used to break down cultural walls in order to build an all-encompassing culture of characterized by ‘we are in it together’. Then I will turn focus to boundary objects and how such boundary objects build walls around cultures.

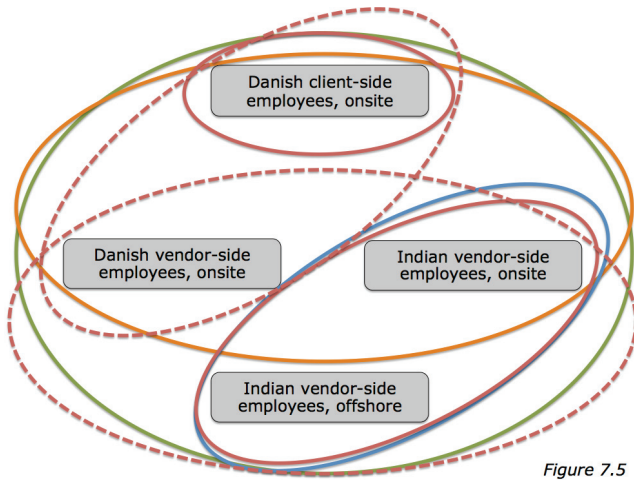


Figure 7.5

Enacting Cultures

Social Constructions of Groups as Enactments of Cultures

Arguably, the social construction of a group is a double-edged sword which on one side establishes, confirms and re-confirms particularity within the group. Bearing in mind the definition of culture as shared meaning and interpretation; the construction of groups signifies unity and particularity within the group. However, this social construction of particularity is also at risk of alienating “the others” as we have seen in the construction of national stereotypes: When the client-side actors construct ‘the Indians’, they distance themselves from this group – but they do so without explicitly creating a “counter group”. That is, they never construct themselves as for instance ‘Danes’ or ‘Europeans’ or ‘Westerners’, but only construct the “counter group” as something they themselves do not belong to. This “counter group” is perceived as hierarchical, micromanaged, evasive and without a sense of personal responsibility.

When the client-side actors and the vendor-side actors construct groups of ‘client’ and ‘vendor’, they construct differences that relate to the contractual obligations but also to how information should be shared and to how one group (the client-side) has the

privilege of conducting business as usual, while the other (the vendor-side) is obligated to service the client, to understand and to adapt. In a similar vein, the construction of onsite and offshore groups respectively, imposes shared meaning and interpretation, where the onsite actors are *the experts* and the offshore actors are the *expertise-seeking novices*. Finally, the fourth grouping – the “we are in it together” group: This is different as this construction aims at *only including, not excluding*. Below I will attend in more detail to how this is done.

Presentational Rituals: Breaking Down the Cultural Walls

As we know from Kunda (1992) presentational rituals exist in three forms, namely ‘talking down’, ‘talking across’ and ‘talking around’. In the theoretical section of this chapter I have argued that while Kunda’s concept of presentational rituals has an inter-organizational perspective and thus intra-organizational rituals can be argued as instances of *talking across* I claim that in the instances where the client-side actors engage in presentational rituals with the offshore vendor-side actors it is rather a case of *talking down*. I have argued earlier how the social constructions of organizational groups – that is: ‘the client’ and ‘the vendor’ – bring about certain patterns of meaning, where the vendor-side actors are constructed as those who service the client, those who are expected to understand the client and adapt to the client’s way of working. Thus, the client-vendor relationship is infused with power, in the sense that the client-side actors have *the right* to define what good work is and how it is done.

Such instances of presentational rituals in the form of ‘talking down’, is a part of every single client visit to the OMC. At least once during such a visit the highest-ranking client-side actor who has joined in on the visit at the OMC will address the full body of vendor-side actors at a so-called town hall meeting. During such town hall meetings the client-side manager will typically present the last periods financial results for the client company; he will present strategic initiatives; he will talk about the performance

of the IT platform; and he will thank the vendor-side actors for bringing value to the client organization (Field Notes 20130502).

During the client-side visit to the OMC in Chennai in September 2013, where I accompanied the client-side delegation I witnessed one such session where the CIO was the presenter. The night before the session I was talking to him over dinner and he told me that he was a bit reluctant to do the presentation, as he could not present much new. However, he assessed that it is important to do such presentations even though there is not much new to say, as “it gives them [the offshore vendor-side actors] a feeling of being valued and being an integral part of [the client organization]” (Field Notes 20130910). On another occasion the client-side Director of IT-operations had explained that these town hall presentations were “somewhat a courtesy to the Indians” (Field Notes 20130502) to make sure that they also had an understanding of the challenges ahead; and a strategic perspective on their work.

The following day, the CIO did his town hall presentation: Presenting strategies, performance results and thanking the vendor-side actors for their contribution. At the meeting all of the client-side actors who were visiting the OMC also participated and the new head of client-side IT-development and the equally new client-side chief architect were presented. The presentation seemed carefully crafted to stress exactly that the vendor-side actors are an integral and values part of the client’s IT setup – what the CIO told me the night before. During the presentation he consequently used “we”, “us” and “our” to describe unity of the vendor and the client. Only when he specifically addressed achievements where he wished to acknowledge the vendor-side’s significant contribution he talked about “you”, as for instance when he thanked for the high operational stability, where they had not encountered any ‘priority 1 incidents’ (incidents with significant impact on operational stability).

In terms of content, the town hall meeting I observed resembled the bi-weekly department meeting in the Copenhagen office a lot. The major difference lied in the

inclusive rhetoric, where the CIO carefully communicated how they ‘are in it together’. This stands in contrast to the bi-weekly meetings in Copenhagen, where he would usually use us-and-them dichotomies where “we” signifies the client-organization and where the vendor-side actors are constructed as a “they”.

In addition to these instances of ‘talking down’ there are another type of presentational ritual in the empirical settings of outsourcing collaboration between the two organizations. This is an equally formalized ritual, but one that cannot be categorized neither ‘talking down’, nor ‘talking across’ or ‘talking around’. Rather it can be understood as a fourth typification of presentational rituals labeled as ‘*talking up*’.

During these client-side visits to the OMC in India there are several instances – one for each ‘track’, which is the term they use for a functional area, such as storage, network, active directory et cetera – of ‘talking up’ presentational rituals, where the vendor-side actors are expected to present their successes, their challenges and suggestions for future initiatives. During all of these meetings – nine in total – I sat with the participants and took notes. Below is excerpts of my write-up of the impressions I got from these meetings, compiled in approximately 11.000 meters altitude on my way back to Copenhagen after the OMC visit.

It has been a good week. It has been an interesting week. I have learned a lot about Berlingske Media’s team and their perceptions of the collaboration with HCL – especially during the informal conversations over numerous drinks at the hotel in the evening. I have always perceived them to be honest and direct when I have spoken to them. Nevertheless, the unfiltered stories that surface around midnight enrich the picture. [...]

The problematic thing about doing field work like this – in a context of a visit, where everybody is eager to get as much out of the ‘confrontation time’ as possible is that it is impossible to be present at all the meetings, when they are run in parallel sessions. Before departing I decided that I would follow the IT-

operations people from Berlingske Media in everything they attended to. I am glad I did, but I would indeed have liked to attend the other meetings too. [...]

I attended a total of nine track meetings over the course of three days. Present at all meeting were the two IT-operations people from Berlingske Media and the service delivery manager from HCL, and myself. From each of the tracks the track lead and a few other track team members were present. In a few cases, where the teams are very small, the full team participated.

I remember that the Director of IT-operations told, back in May after his last visit to the OMC, that his main objective with these sessions were to get the offshore staff to stop “hiding”. He said that he had succeeded and that they were now asking critical questions and that they no longer seemed to be “afraid” of the client. He appreciated that. He took it as a sign of engagement.

So, how can I sum up my impressions of these nine meeting? A few words come to mind: ‘unity’, ‘distance’, ‘initiative’ and ‘status reporting’ – contrasting words indeed. The most remarkable thing I have noticed is ‘distance’. Whenever a team enters the room, nothing happens. No small talk, no attempts to create rapport, nothing. The teams enter the room; in some instances they formally greet the client-side people with handshakes, while in other instances they just take a seat. And the room is quiet up until the Service Delivery Manager or one of the client-side IT-operations people signal that they are ready to start the meeting. Only if the client-side people have prior knowledge about the OMC staff – typically because they have been stationed onsite – there is some interaction. In those rare cases pleasantries are exchanged “how are you doing”, “how is it being back in India”, so on and so forth. The most remarkable meeting was the one with the security team. My notes read like this: “A little after noon the security team comes in. No one says hi. 15 minutes later the team lead starts talking and present the other people in the room“. Remarkable, odd...!

The most confusing thing about the mental distance is that it is clearly opposed by what the IT-operations people say during the meetings. Their rhetoric, once the meetings have started, are all about ‘unity’: “We depend on you”; “I think that the Kiev team think that they have everything figured out and that you guys have

nothing figured out - and that is not our impression at all"; ""We expect that the role we have in Copenhagen, you have in the OMC"; "We are very open to your suggestions. You are our experts on this". The client-side people repeatedly expressed unity in the way they talk – but rarely in the way they act.

And the OMC staff: They seem genuinely thankful, when they are acknowledged for doing a good job. But very few of them make an effort to engage with the client-side people. They come in to the room; they wait for the Danes to start the meeting and remain quiet until then. Then they do their presentation. It has the feeling of 'status reporting'. Even when they propose initiatives I get the feeling that it is something they do because they are required to. Only on a very few occasions do they engage in dialogues with the client-side people. They present their initiatives – as they are expected to do – they listen to the feedback; and then move on to the next topic. To me, they seem to be intimidated by the client-side people.

Before the meetings I asked the client-side IT-operations people what they expected from these sessions. They told me that their aim was to empower the OMC staff and that they wanted them to bring about new 'initiatives'; to give them a role in improving the IT-operations and not just run it. Clearly, this is what counts to them. Did they achieve this? I doubt it. Indeed, they did get a lot of suggestions and maybe this trip is a stepping-stone towards a more integrated collaboration – but they are not there yet.

During a break I spoke to the client-side Service Delivery Manager about how he perceived his own role. I had noticed that during most of the presentations he had remained quiet. My notes read: "During this meeting and actually also most of the others [the vendor-side service delivery manager] is very quiet. He is observing. Much the way I do" (Field Notes 20130910). He explained that he believes "it is very important for him to empower the people. To have them talk themselves and meet with the Danes". (Field Notes 20130913)

The most striking observation was that while the notion of 'unity' was repeatedly brought to the table by the client-side actors these meeting was to a great extent

characterized by a mental distance: The meetings followed a specific agenda and in the vast majority of meetings there was no *personal* engagement. By and large the actors performed their professional role giving a sense of status reporting, with no attempt to get to know one another.

When I returned to visit the OMC in Chennai in late January 2014 I had a chance to talk to the vendor-side service delivery manager about his perspective on empowering his staff. One evening we were on our way out to have dinner, just the two of us, and in the car we came to talk more about this subject. He told me: “I am different than most Indian managers that way” (Field Notes 20140123) when I asked him about his philosophy on empowering the staff; and he explained that as he was not the expert on the various subjects and because the client-side actors were very keen on having a more integrated collaboration – which he agreed on to be the best way forward – he felt it was important to give his subordinates the chance to engage directly with the client as much as possible. And he assessed it as “work-in-progress, but we are slowly moving forward” (Field Notes 20140123).

Thus, ‘talking up’ is a very central presentational ritual in the collaboration between Berlingske Media and HCL. It is a ritual driven by the client-side actors, but with support from the vendor-side management. After the September visit to the OMC I conducted follow-up interviews with the client-side delegation, where I enquired specifically about how they perceived these sessions and what they gained from them. One explained that he would characterize them as “relatively constructive meetings” (Interview #12), which had been beneficial insofar he has more dialogues with some of the teams now. He gives an example of one team that he has earlier perceived as very apprehensive, that now are calling him more and another example relating to one of the incident managers, with whom he had a good relation even before the client-side visit. This relationship is now even better and “he [the incident manager] happily calls me day and night now” (Interview #12). He appreciates their input and explains that when

he “is out there [at the OMC] they seems to be talented people that know what they do and have everything under control and then one gets happy and excited, thinking that everything will work out – and then when one get’s home it’s the same old story as before one visited [the OMC] [...] When you are out there and can see things for your self you get a different perception of things. But when you are back here [in Denmark] things are progressing very slowly again – it takes a lot of time for them to solve things” (Interview #12)

In a similar vein, the other client-side actor who had participated in the meetings I observed assessed that he was “surprised how open [the vendor] were this time compared to last time. That is really good” (Interview #15) and continues: “I think a lot of the track leads have found out how we work and how we react – that they do not get scolded for making a mistake or suggesting a change [...] they lean how the customer want things done. I think they have learned a lot about that” (Interview #15)

Thus, to sum up the findings related to presentational rituals. In the collaboration between the two organizations two types of presentational rituals aimed at creating a feeling of ‘being in it together’ are employed. The first can be characterized using Kunda’s (1992) term ‘talking down’, while the other can be characterized by ‘talking up’, adding a fourth type of talking to Kunda’s (1992) notion of presentational rituals. Common to both ‘talking down’ and ‘talking up’ are that the client-side actors stage the presentational rituals. That is, the common collaborative culture is as such non-negotiated as it is by and large defined by the client-side actors and adhered to by the vendor-side actors, who adapt to the client-side way or working. Presentational rituals are used as the means to break down “cultural walls” inside the collaboration. In opposition to this are ‘boundary objects’ which are reinforcing the exact same walls as presentational rituals – as they are used in this outsourcing collaboration – aims at breaking down. In the next section I will take a closer look at these boundary objects.

Boundary Objects: Building Walls Around a Culture

Boundary objects, defined as “mediating artifacts that have interpretive flexibility and can be an important means of achieving collaboration, promoting the sharing of knowledge between diverse groups” (Barrett & Oborn, 2010: 1200), are arguably an essential part of most distributed work, just as collaborative technology is. In Chapter VI: ‘Flipping the Switch on Trust and Control’ I have shown how the necessity to use such technology has a significant impact on the collaboration as well as the trust between geographically distributed actors. One could reasonably argue that collaboration technology such as emails, chats, video-conferencing equipment and phones are themselves boundary objects – nothing in Barrett & Oborn’s (2010) definition argues against this. However, the examples on boundary objects that Barrett & Oborn (2010) are bringing to the table suggest that what they are thinking about is documents, systems that captures and displays data as well as processes and methodologies. In line with this understanding of boundary objects I have identified two such boundary objects with significant impact on the collaboration between the client-side actors and the offshore vendor-side actors. These are: the change management process and the Remedy tool.

These two boundary objects (where the first has been discussed in Chapter VI: ‘Flipping the Switch on Trust and Control’ too) have two common denominators. First, they are instigated as coordination mechanisms. Second, due to the control that is enabled by the instigation of these boundary objects, they are *culturizing* the collaboration. That is, they demarcate us-and-them dichotomies and reinforce them. In the remainder of this section I will follow “the negotiations around the boundary objects as they are used in practice” (Barrett & Oborn, 2010: 1215) and show how they reinforce some of the social constructions of groups I have described earlier in this chapter.

Both boundary objects are instigated in order to comply with the ITIL framework. ITIL is – as described in Chapter VI: ‘Flipping the Switch on Trust and Control’ a framework which has become a standard adopted by organizations worldwide to manage IT operations. Therefore, they can be characterized as *standardized forms* (Star & Griesemer, 1989). As mentioned in Chapter VI ITIL was implemented in order to have a common set of processes and a common vocabulary that both the client-side and the vendor-side understands and adheres to. While there is no reason to question the value the ITIL framework has on coordination among the actors it also has a flipside. The two boundary objects that I will elaborate on below are examples of this flipside.

In Chapter VI: ‘Flipping the Switch on Trust and Control’ I have argued how the change management process is embodied by the vendor-side change manager in the eyes of the client-side employees; and I have shown how dissatisfaction among the client-side actors with the thoroughness of the process-based preparation of a change is repeatedly expressed as something related to the change manager’s personal abilities and never to the role or the process. In other words, the boundary object, in this case the change management process, is perceived as something faultless and as a consequence a failure must, in the eyes of the client-side actors, be attributed to the vendor-side change managers’ lack of abilities. The change manager is labeled as “a secretary who fills in templates and sends them up here [to Denmark] for approval” (Interview #6), which is, more or less directly, attributed to his Indian heritage. The reasoning seems to be that he needs to be micro-managed; that he does not possess “the same kind of feeling of personal responsibility, as we do in the west” (Interview #04) and that he is evasive and tries to keep a harmonious atmosphere instead challenging the developers who are submitting the change.

Is this a reasonable picture? I do not know – I can only guess. My observations during my second visit to the OMC in Chennai suggest that he is definitely not evasive:

During my visit I was given a desk just two seats away from him and I heard him talking to the vendor-side developers, questioning whether they had performed all steps adequately several times. He did not strike me as someone who is preoccupied with maintaining a harmonious relationship at all (Field Notes 20140121).

Furthermore, during one of the change board meeting I observed in Copenhagen after returning from my second visit at the OMC one of the client-side actors instructed the change manager to “filter it out so we don’t need to bring it up in the meeting” (Field Notes 20140129) with reference to a change that should not have been approved by the vendor-side change manager according to the client-side actor. One of the vendor-side actors deployed onsite tried to defend the change manager exclaiming: “I think getting approval from [the change manager] is not so easy” (Field Notes 20140129). As said, I do not know if he is evasive, has to be micro-managed and do not possess a sense of personal responsibility – but the interesting point is that *the client-side actors do not know either*. There could be an endless number of other explanations: Maybe he is over-worked; or maybe there are some power relations that force him to approve dubious changes. But in the eyes of the client-side employees, the change management process is infallible – it is “a standard ITIL” (Field Notes 20130226) as one of them told me – and they stick fast to an explanation drawing on cultural stereotypes of Indians and thus the change management process becomes a *culturized boundary object*.

Another example of the flipside of boundary objects is the *repository* (Star & Griesemer, 1989) called ‘Remedy’. Remedy is a web-based tool in which both client-side actors and vendor-side actors monitor the status of reported incidents. From the vendor-side perspective this tool is an integrated part of handling the incidents, as they are the one’s updating progress on incidents in the system and changing the status of an incident accordingly. The client-side actors do not actively change status or update information in Remedy. Rather, they use it for monitoring progress – or lack of the

same – on incidents. On a monthly basis the data in Remedy is compiled in to an elaborate report on SLA fulfillment (as described in Chapter VI: ‘Flipping the Switch on Trust and Control’).

One of the client-side actors elaborate on Remedy as a boundary object: “Everything evolves around this task handling system that we use – Remedy. The task [an incident or a problem] is reported here, followed up on and solved” (Interview #6). While the example I gave on the change management process has quite severe culturizing consequences, this is not to the same extent the situation with the Remedy tool. However, it is important to note how Remedy establishes a boundary between those who *handle* the incidents (the vendor-side actors) and those who *monitor* the handling (the client-side actors). This way, Remedy is *culturizing* in the sense that it creates us-and-them dichotomies.

I have repeatedly experienced how the client-side actors are frustrated by the long response time of Remedy, which is a subject that has also been addressed at the steering group meeting (Field Notes 20130501). Why is it so? Apparently because Remedy has been instigated as a coordination tool, that aims at minimizing intra-organizational dialogue and pave the way for smooth, efficient and standardized collaboration; and when the client-side actors experience unsatisfactory response times they are frustrated because it inhibits them from having a sense of control over the work that is done at the OMC. Consequently, the client-side actors are keen on seeing an improved performance of Remedy. As the client-side Director of IT-operations explained: “I got really mad when I realized that they [the vendor-side track responsible for Remedy] had practically nothing planned for improving Remedy. I had to show them what the problem was and in the end [the vendor-side service delivery manager] had to bring them in to another room to explain how important this is. [...] I was furious!” (Field Notes 20130502).

Remedy is just one example of a culturizing boundary object that glorifies this “efficient” standardized way of working. Other examples are SLA reports (where the data is derived partly from the Remedy tool) and the aforementioned change management process including the templates and reports attached to this. In line with the findings of Barrett & Oborn (2010) I argue that these boundary objects are facilitating collaboration but also contributing to – if not conflict – then at least to reinforcing cultural boundaries; in other words: they are *culturizing* the collaboration. When I turn to discuss how trustworthiness is affected by cultural boundaries later in this chapter I will argue why such standard processes aimed at minimizing interaction is in a sense counterproductive to trust development.

Culture and Trustworthiness

In the beginning of this chapter I introduced this research question: *How is vendor-side actors’ trustworthiness affected by enactments of cultural boundaries?* I have presented my view on culture, understood as shared meaning and interpretation. I have laid out my strategy on how to analytically understand culture by looking into social constructions of groups, presentational ritual and boundary object. Subsequently, I have analyzed accordingly. The question remains: How is culture and trust related to each other and how can we improve our understanding of how the vendor-side actor’s trustworthiness is perceived in this outsourcing collaboration by looking into how culture is negotiated? The remained of this chapter will be dedicated to answering exactly this question.

Antecedents to Trust: ABI ... and ‘Proactiveness’

In the section on ‘Researching Trust in a Cross-Cultural Perspective’ earlier in this chapter, I argued how the widely recognized antecedents of trust and characteristics of trustworthiness, commonly referred to as ABI – Ability, Benevolence and Integrity – proposed by Mayer et al. (1995) can indeed be regarded as “base characteristics” of trustworthiness that do not vary across cultures. I did so, by arguing that they are

built into the definition of trust I adhere to. Furthermore, in Chapter V: ‘Challenged by Distance’ I have shown how these three antecedents are central to trust development in the outsourcing collaboration between the client and the vendor. I did so by focusing on how physical distance inhibits trust development as a) client-side actors refrain from assessing vendor-side actor’s abilities on an individual level; b) client-side actors assess the integrity of the vendor-side actors negatively when expected performance criteria are not met; and c) client-side actors refrain from assessing the vendor-side actor’s benevolence, which leads to negative conclusions and thus keep the actor’s from approaching their other-organizational counterparts directly.

However, the question remains: Can these perceptions of ability, integrity and benevolence solely be attributed to physical distance or does enactments of culture also play a role – can a culture analysis of the geographically dispersed collaboration further refine our insights into how and why trust development is inhibited? I will attend to this question below in the section ‘Keeping the Iron Cage Locked’. However, before advancing to this it is necessary to re-iterate on the perceptions of ability, benevolence and integrity across the identified socially constructed groups and secondly to introduce an additional antecedent to trust: As argued above ability, benevolence and integrity are not necessarily the only antecedents to trust. In line with Tan & Chee (2005) who identified several additional antecedents to trust in their study of a Confucian-influenced society I argue that in the settings that constitute the empirical foundation for this dissertation, there is also an additional antecedent to trust, namely ‘*proactiveness*’.

Ability, Benevolence and Integrity Across Cultures

Are the three base characteristics of trustworthiness – ability, benevolence and integrity – dominant in the client-vendor collaboration and if so, can this be explained by cultural enactments? As I have argued in Chapter V: ‘Challenged by Distance’ and recapped above the client-side actors perceive the offshore vendor-side actors as less

knowledable. Thus, the abilities of the offshore vendor-side actors are evaluated as less than the onsite vendor-side actors as well as the client-side actors. The client-side actors never attribute the perception of lesser ability to differences across national or organizational culture. Rather, the lesser ability is attributed to distance and I have on several occasions heard client-side actors assess how they believe that obtaining a high level of knowledge about the client's business would be difficult for anyone sitting more than 7000 kilometers away. Thus, we must make a distinction between the perception of ability related to *actors* and related to *circumstances*. That is, actors are perceived to have lesser ability under given circumstances, namely physical distance.

On this note it is interesting to observe just how quickly vendor-side actors are included in the group of the *knowledable few* when they travel to work at the client's headquarters: They are almost immediately charged with complex tasks and I have observed how a vendor-side actor within a few weeks after arriving onsite is praised for his abilities. In a similar way client-side actors quickly turn from not assessing the benevolence of the vendor-side actors when they are working at the OMC in India to a positive assessment when they are relocated to work at the client's headquarters in Denmark. The inclusion into the group of the knowledable few also includes positive assessments of benevolence. Finally, working onsite means that the vendor-side employees are less exposed to negative assessments of integrity when collective performance criteria are not met.

As argued in Chapter V: 'Challenged by Distance' assessments of trustworthiness shifts from being aimed at the collective to being aimed at the individual when vendor-side actors move from working offshore to working onsite. My empirical investigations suggest that the construction of groups based geographical placement has a significant impact on perceived trustworthiness: When vendor-side actors are working at the same geographical premises as the client-side actors they are assessed as *individuals* rather than as a part of a larger collective. Arguably, the shift from

working offsite to working onsite they *become individuals* in the eyes of the client-side actors. Interestingly, the physical proximity changes the focus of these assessments of trustworthiness at an individual level, but without changing the client-side actors propensity to trust the vendor-side employees on a higher level. While the client-side actors clearly acknowledge that vendor-side actors can be both able, benevolent and have integrity when they are onsite, this does not result in more favorable assessments of the vendor-side actors in general. Below I will attend to the consequence of this enactment of culture, but first I will have a closer look at the fourth antecedent to trust, namely proactiveness.

Proactiveness Across Cultures

In the section on national stereotyping I have shown how the client-side actors perceive ‘The Indian Work Culture’ as hierarchical and that ‘The Indians’ need to be micro-managed. Furthermore, the client-side employees perceive ‘The Indians’ as lacking personal responsibility and preoccupied with maintaining harmony. These three factors together are perceived to impede proactive behavior and the client-side actors repeatedly voice their concern about this lack of proactive behavior. Because the client-side actors have clear reservations with regards to working with the offshore vendor-side actors and because the exact same notion of proactiveness repeatedly emphasized and acknowledge with regards to the onsite vendor-side actors, who are praised for their work, I consider proactiveness as an antecedent to trust, seen from the perspective of the client-side actors.

One could argue that proactiveness should not be regarded as an antecedent to trust in its own right, but rather be understood as a subset or specification of benevolence or integrity, or both. Indeed, if we regard benevolence as a “perception of a positive orientation of the trustee toward the trustor, including expressions of genuine concern and care” (Dietz et al., 2010: 10) one can claim that proactiveness is nothing more than a way of accommodating the expectation of such genuine concern and care. The

argument would read: *By proactively engaging in finding new solutions that exceed the contractual obligation the vendor-side actors display genuine care and concern for the IT-environment of the client.* However, as I have discussed extensively, the vendor-side actors are keenly focused on adapting to the client-side expectations in terms of how to perform work. At the same time, as argued in Chapter VI: ‘Flipping the Switch on Trust and Control’, the vendor-side actors are subjected to a rather strict output control, where there are financial consequences for the vendor organization insofar the SLA objectives are not met. Thus, it is highly probable that the vendor-side actors who, when they are not stationed onsite, are practically exclusively measured on adherence to the SLA requirements and adhering to an argument that could read: *By meeting contractual obligations such as SLA targets we, the vendor-side actors, display genuine care and concern for the IT-environment of the client.* Thus, on one side genuine care and concern can be manifested through proactive engagement and on the other side through meeting contractual obligations – and both can potentially be tokens of benevolence.

According to Mayer et al. (1995) benevolence “is the extent to which a trustee is believed to want to do good to the trustor, aside from an egocentric profit motive” (p. 718). As I have elaborated in Chapter V: ‘Challenged by Distance’ the client-side actors refrain from assessing their counterparts’ benevolence when they have not met in person; and earlier in this chapter I have shown how lack of proactiveness is attributed to national culture. Thus, it seems that there is no direct link between the client-side actor’s assessments of whether or not the vendor-side actors are genuinely concerned and their perceived lack of proactiveness. Consequently, *proactiveness should not be regarded as a subset of benevolence, but rather an antecedent in its own right; insofar it can be justified that is not a sub-set of integrity either.*

According to Mayer et al. (1995) the “relationship between integrity and trust involves the trustor's perception that the trustee adheres to a set of principles that the trustor

finds acceptable” (p. 719). Let us consider proactiveness in this perspective: On one side integrity is about adhering to a set of principles. Arguably, such a set of principles could both include and not include ‘proactiveness’. But Mayer et al. (1995) goes further as they point out that the set of principles must also be acceptable to the trustor. In this perspective, one can argue that because the offshore vendor-side actors, in the eyes of the client-side actors, do not include ‘proactiveness’ then the set of principles is not acceptable, in the eyes of the client-side actors. Thus, in this perspective ‘proactiveness’ is not an antecedent to trust in itself, but rather a subset of integrity. However, while ‘proactiveness’ may indeed be a ‘principle’ it is hardly the type of principle that Mayer et al. (1995) have in mind: In support for their claim that integrity can be regarded as an antecedent to trust they refer to a range of other scholar’s constructs (Mayer et al., 1995: 718 – see table). These constructs are, among other’s value congruence, consistency, fairness and promise fulfillment. Thus, I argue that the set of principles that Mayer et al. (1995) have in mind are *moral* principles and indeed a layman understanding of both the term integrity and the term principle would suggest that moral plays a significant role.⁵ I argue, that proactiveness can hardly been seen as something that relates closely to moral and thus *I argue that ‘proactiveness’ should not be considered as a subset of integrity, but rather as an antecedent to trust in its own right.*

To sum up: In addition to the three “base characteristics” of trustworthiness – ability, benevolence and integrity – there is an additional antecedent to trust, namely ‘*proactiveness*’ at play in the settings that constitute the empirical foundation for this dissertation. In the following section I will discuss how enactments of culture sustains this perception of ‘Indians’ as re-active actors and how trust building is impeded by the very same mechanisms that sustain the image of ‘the Indians’ as re-active.

⁵ Webster’s Dictionary defines integrity as: “the quality of being honest and fair” and Principle as: “a moral rule or belief that helps you know what is right and wrong and that influences your actions”.

Keeping the Iron Cage Locked

Why do the client-side actors perceive the offshore vendor-side actors as re-active? If we turn to an Hofstedian view on culture it could probably be answered quite simple: Because of the relative high power distance; because India is a collective where the “I” is replaced by “we” and thus individual agency is given less value; and because of relatively high uncertainty avoidance Indian prefer to follow orders blindly instead of engaging in more risky encounters such as proactive thinking and acting where one is more exposed to the risk of failure. That’s it! The Hofstedian explanation could even be accompanied by a nice illustration showing how Denmark and India compares, like in figure 7.6 below.

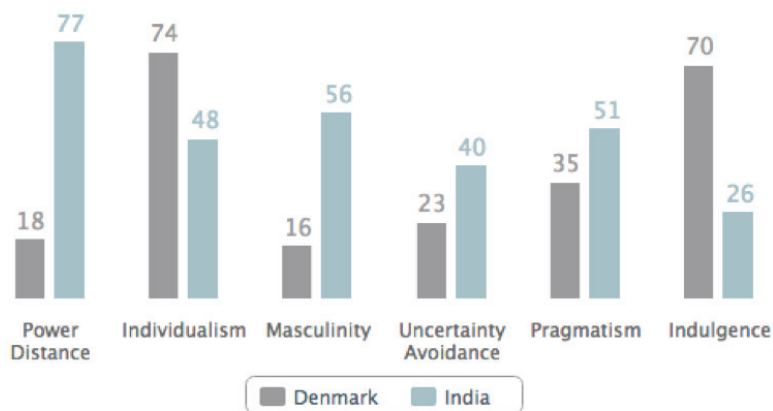


Figure 7.6

This sort of explanation resembles the way the client-side actors make sense of their Indian counterparts to a great deal. However appealing one may find this sort of analysis, I argue, in line with Söderberg & Holden (2002) that *we must break out of the iron cage that Hofstede puts around culture and understand culture a dynamic construct where human agency plays a vital role*. In the remainder of this section I will take a closer look at why the client-side actors perceive the offshore vendor-side actors

as re-active by bringing the analytical findings related to social constructions of groups, presentational rituals and boundary objects into play.

First step is to realize the significance of the geographical distribution. In Chapter V: ‘Challenged by Distance’ I have shown how cross-locational collaboration is challenged by three different factors, namely ‘going directly’, lack of knowledge and lack of transparency. I have also re-iterated on these challenges earlier in this chapter, where I have pin-pointed how the enactment of an us-and-them dichotomy based on physical placement impacts assessments of trustworthiness: Those vendor-side actors that are working in close physical proximity with the client-side actors are assessed as individuals, whereas the vendor-side actors working at the OMC in India are assessed as a collective. This leads to a situation, where the actors – from both organizational entities – who are working onsite constitute a group of the ‘knowledable few’ with both overview and a deep understanding of the IT-systems as well as the client’s business; and they are perceived as benevolent and as having integrity. This is interesting because it shows that when the vendor-side actors of Indian heritage are sent onsite to work closely with the client-side actors they can break free of the stereotyping: They are no longer perceived as a collective, as ‘The Indians’, but as individuals – and these individuals are repeatedly praised for their abilities and their good work: They become a part of the “onsite culture” of ‘the knowledable few’.

Second step is to understand the significance of how the roles of ‘the client’ and ‘the vendor’ respectively are negotiated. I have shown how the client-vendor relationship is constructed as a relationship where the vendor-side actors are expected to service the client, to understand and to adapt to the client’s way of working. That is, the interpretation of what a client-vendor relationship is (on both the client-side and on the actor-side): ‘the client is always right’. One of the vendor-side actors said it best: “they [the client] are the ones who is sponsoring this, so I have to adapt” (Interview #05).

One could argue that if the client has the power to define how to work and what good work is at all – and the vendor-side agrees to this – then the vendor-side actors could *en bloc* very well adapt to the client’s demand for proactiveness. However, there are ample reasons why this cannot easily be done, which leads me to the third point: The use of presentational rituals.

I have argued that two types of presentational rituals aimed at uniting and established a feeling of being ‘in it together’ are at play in the collaboration between the client and the vendor: one is about *talking down* and the other is about *talking up*. These two types of presentational rituals have one thing in common, namely that they are only performed when the client-side actors visit the OMC in India. The client-side CIO explains the reasoning for engaging in the *talking down* presentational rituals like this:

“It is to show that the relation to them is important and that they are important. I started by presenting our strategy and their role in this. They were very happy about this and appreciated that I shared it with them and that I made clear that they are a central part of this and that they are important to us. [...] Then I took a round and shook everybody’s hands to state that they are on the team. When that is done I might as well leave, because I cannot engage in operations. It created a foundation: They are much more hierarchical than we are in Denmark and therefore it is important that one with stars on the shoulder of the jacket comes and gives his blessing to the relationship and says “we really like you and you are important to us and we will be in the for a long time together (Interview #04 – client-side actor)”

Do these kinds of presentational rituals have an effect? I believe they do. However, when these rituals are exactly that, *rituals*, and detached from everyday office life they loose their impact. In average the client-side actors visit the OMC twice per year. Thus, the talking down presentational rituals take up approximately two hours per calendar

year and the talking up presentational rituals take up on average one hour per vendor-side employees at the OMC (as the meetings with each team lasts about half an hour). Arguably, for such presentational rituals to have an effect they need to be reinforced significantly more often, which is not the case. Rather than reinforcing the message of unity, what in fact happens as soon as the client-side actors have returned to Denmark and the positive attitude towards ‘The Indians’ have declined, the client-side actors are again succumbing to the national stereotyping of Indians I have elaborated extensively on throughout this chapter; and the assessments of trustworthiness is again focused on collectives rather than individuals.

This brings me to the fourth, and final, point, which relates to boundary objects. In Chapter VI: ‘Flipping the Switch on Trust and Control’ I have shown how the necessity to use such technology has a significant impact on the collaboration as well as the trust between geographically distributed actors and in the current chapter I have expanded this view by looking into the use of boundary objects and how these boundary objects, in line with communication technology, impacts collaboration. These boundary objects are instigated as coordination mechanisms aimed at easing coordination across distance. While there is no reason to doubt that they do exactly that, I have also shown that there is a significant flipside as the boundary objects reinforces socially constructed groups and hereby strengthens us-and-them dichotomies and works *against* the exact same ‘unity’ as the client-side actors via presentational rituals tries to enact. Furthermore, I have shown how the notion of a certain process as being infallible, as a “standard ITIL thing” (Field Notes 20130226) as one client-side actor said, suggesting an objective meaning of processes, can fortify national stereotypes.

By accepting ‘proactiveness’ as an antecedent to trust it is easy to see that such boundary objects are in fact counterproductive to staging the vendor-side actors as trustworthy, as they – by their very nature – fail at facilitating proactiveness. Rather,

boundary objects glorifies adherence to standard operating procedures and collective assessments of trustworthiness; and impedes the proactiveness that the client-side actors request from the vendor-side actors.

Concluding Remarks

In the beginning of this chapter I set out to answer this question: *How is vendor-side actors' trustworthiness affected by enactments of cultural boundaries?* Throughout the chapter I have shed light on enactments of culture by focusing on social construction of groups, presentational rituals and boundary object and I have shown how the empirical enactment of these three constructs impacts perceived trustworthiness.

More specifically, I have argued that there is a fourth antecedent to trust at play, namely *proactiveness* and I have argued that the enactment of onsite versus offshore groups has an important impact on how trustworthiness is assessed, as only co-located actors are assessed as individuals. I have subsequently shown how propensity to trust is kept status quo by the means of strong enactments of groups among the client-side actors and because the client-side management fails to continuously engage actors on both sides in presentational rituals when they are not collocated. Finally, the heavy use of boundary objects creates a scenario where the offshore vendor-side actors have no bandwidth to communicate with the client-side actors outside these boundary objects in any way but through the boundary objects. This limits the very possibility to act in a proactive manner, as boundary objects foster adherence to standard operating procedures and hereby impedes proactiveness.

This particular finding also constitutes a significant implication for practitioners, namely that while standardized forms (Star & Griesemer, 1989) of collaboration may prove beneficial when it comes to simplifying coordinative efforts they are also *culturizing* the collaboration as they are in effect building walls around socially constructed groups and hereby reinforcing these groups. Thus, the use of boundary objects come at a price, namely group integration and the possibility to render the

assessments of individual actors' trustworthiness possible, as the individual becomes invisible by the means of boundary objects implemented to coordinate work at a collective level.

The most important practical contribution, however, is related to national stereotyping. Throughout this chapter I have shown how the client-side actors rely on national stereotyping, when they are making sense of the Indian vendor-side actors. Indeed, the Hofstedian view on culture provides an easy-to-grasp generalization of members of other cultural groups. In this specific empirical context such a functionalist view can offer an explanation to why Indians, due to larger power distance and a collective mentality, are not proactive. However, I have also offered another explanation as to why the Indian vendor-side employees by and large are not perceived as proactive. This explanation draws on the challenges of distributed collaboration, where the actors are experiencing lack of knowledge and transparency and find interacting directly with actors unknown to them difficult; it draws on the power distribution between the client-side actors and the vendor-side actors, characterized by a "the client is always right" thinking; it draws on the scarce use of presentational rituals in which the client-side management are establishing unity and empowering the vendor-side actors; and it draws on an analysis of the use of boundary objects and the "management by numbers" that such boundary objects promote at the cost of visibility of proactive behavior. I firmly believe that the second explanation on why the client-side actors perceive the vendor-side actors as reactive has a significantly stronger explanatory power than what a functionalist analysis can provide. And this is an important implication for practice because if practitioners are satisfied with the functionalist explanation, they will also silently accept that lack of perceived proactivity as *the way it is*. By adhering to functionalist explanation practitioners accept that this cannot be changed. However, if adhering to a different - and, I argue, better - explanation the perception of lacking proactivity becomes manageable. It becomes something we can actually *do* something

about. And thus, it opens up for a possibility to improve such cross-cultural collaborations.

The theoretical contribution of this chapter lies in the identification of a fourth type of presentational rituals, namely *talking up*. In Kunda's (1992) original work there are three types of presentational rituals, but none of them can account for presentational rituals, where subordinates are put in the driver's seat as they are *talking up*. Arguably, this notion of talking up is a significant construct in organizations, such as the client-side organization in my empirical context, where proactive subordinate behavior is considered valuable. As this notion of proactive behavior has become quite common in today's organizations I argue that the *talking up* presentational ritual is a significant addition to Kunda's three types as this allows for a more elaborate understanding of how proactivity and employee agency is manifested in modern organizations.

In the analytical section on social construction of groups I have introduced how the native Danish vendor-side actors have a unique position in the outsourcing collaboration between the client-organization and the vendor-organization as they in a sense are a part of both the client-side group and the vendor-side group and at the same time not fully a part of any of the groups. In the next chapter I will take a closer look at their role as boundary spanners alongside other clusters of boundary spanners identified in the empirical context. Thus, the next chapter will take a closer look at how boundary spanners influence perceived trustworthiness.

CHAPTER VIII: SPANNING THE TRUSTWORTHINESS BOUNDARY

Introduction

The importance of boundary spanning in intra- as well as inter-organizational work is by no means a new revelation and “[p]eople who span boundaries of various fields have long been identified in the organization literature as boundary-spanners” (Levina & Vaast, 2013, 294). Authors such as Merleau-Ponty (1964), Tajfel (1978), and Tushman & Scanlan (1981) have earlier articulated interest in boundary spanning. However, the “increased globalization of organizations and markets has created a need for simultaneously spanning multiple cultural, institutional, temporal, and spatial boundaries” (Levina & Vaast, 2013: 285) and thus it is safe to say that boundary spanning has become an increasingly complex matter over the latter twenty years. The increased globalization of IT-work serves as a good example of this complexity, as Levina & Vaast (2008) point out:

“Increasingly, firms source more complex and strategic as well as harder to codify information technology projects to low-cost offshore locations. Completing such projects successfully requires close collaboration among all participants. Yet, achieving such collaboration is extremely difficult because of the complexity of the context: multiple and overlapping boundaries associated with diverse organizational and national contexts separate the participants.” (Levina & Vaast, 2008: 307)

In the last chapter I have identified a number of groupings in the empirical context I am investigating and I have argued how discursive constructions of groups create ‘us versus them’ dichotomies; and how boundary objects play an important role in fortifying the boundaries associated with such dichotomies. In line with other researchers I have found that the offshoring collaboration is characterized by multiple

boundaries, which arguably must be bridged simultaneously in order to achieve an effective and well-functioning collaboration (Espinosa et al. 2003; Hinds and Bailey 2003). Also in line with previous research, I have found that cultural (Cramton & Hinds 2005; Krishna et al. 2004), organizational (Espinosa et al. 2003), and functional (Espinosa et al. 2003) boundaries pose challenges to collaboration in distributed team environments.

In order to succeed in such distributed teamwork one must, according to Palus et al. (2013) “lead and also participate in shared leadership, *across* groups, at the junctures where wide-ranging experience, diverse expertise, and varied identities intersect” (p. 206) as work is increasingly characterized by lack of shared identity and culture. That is, in order to succeed actors must engage in boundary spanning, which according to Palus et al. (2013) is required for building trust between heterogeneous groups. (Palus et al., 2013: 219). Within the trust literature the relationship between boundary spanning and trust is also recognized: “Clearly, trust across boundaries deserves further attention, conceptually as well as empirically” (Kroegeer & Bachmann, 2013: 280) as “the role of boundary-spanners in building and maintaining trust between organizations has effectively remained a ‘black box’ in research to date” (Kroegeer & Bachmann, 2013: 253).

In this chapter I will be zooming in on the relationship between boundary spanning and trust by asking the question: *What is the role of boundary spanners and how do these boundary spanners influence perceived trustworthiness of vendor-side actors and the vendor organization?*

The chapter will progress as follows: First, by drawing on recent scholarly work on boundary spanning I will define boundary spanning and the role of boundary spanning in distributed teamwork; and I will introduce an analytical framework for understanding boundary spanners’ role in developing trust. Second, I will apply this analytical framework on the most significant boundary spanners. Third, based on the

analysis of boundary spanning activities, I will discuss some the main findings and reflect on how boundary spanning activities could support positive assessments of trustworthiness and thus pave the way for reaching, what Palus et al. (2013) calls “the nexus effect”. Finally, I will sum up the chapter in the section ‘Concluding Remarks’.

Theorizing on Boundary Spanning and Trust

Boundary Spanning Theory

“Through their practices, agents are constantly engaged in shaping fields of practices as well as the boundaries that separate these fields.” (Levina & Vaast, 2008: 309)

While it may be tempting to identify boundaries in specific empirical settings *a priori* we must acknowledge that boundaries are *never a priori* constructs that can be taken for granted. Rather, boundaries are, as Levina & Vaast (2008) rightly point out shaped by actors. Thus, in order to identify boundaries in real-life empirical cases we must not retreat to *a priori* assumptions about boundaries being problematic, for instance by claiming that the collaboration between two organizations will always impose boundaries worth investigating. Indeed, there may be a boundary, but this boundary may not always be perceived as a faultline (Cramton & Hinds, 2005), but can be unproblematic or even unnoticed. Rather, we must look for perceived *differences* (Palus et al., 2013) that instigate a demarcation between the two organizational groups in their collaboration. In the last chapter I have outlined how the actors socially construct groups; and I argue that these constructions denominate such difference. Thus, the analysis in this chapter will be based on the findings reported in the last chapter.

However, it is important to note that a focus on *differences* does not automatically entail a focus on challenges and problems. Difference may just as well be enablers making way for new possibilities. Palus et al. (2013) stress that “[b]oundaries in the

workplace are experienced in two different ways. They may be experienced as conflict-ridden *barriers* that limit human potential, restrict innovation, and stifle organizational and societal change. Or, boundaries may also be experienced as new *frontiers* at the intersection of ideas and cultures, where breakthrough possibilities reside” (p. 206).

Within the boundary spanning literature five types of boundaries are found to be the most prevalent, namely horizontal boundaries between functions and expertise; vertical boundaries between different levels of status in a hierarchy; geographic boundaries; demographic boundaries for instance between actors with different nationalities, income or religious conviction; and stakeholder boundaries (Langan-Fox & Cooper, 2013). Arguably, the last type of boundary, the stakeholder boundary, can be conceived of as a “catch-all” type as boundaries which cannot be categorized using one or more of the other four types is captured by the stakeholder boundary type.

The boundary spanner is thus an actor who spans such boundaries by engaging in boundary spanning activities and “[i]n the broadest sense, boundary-spanning activities are actions undertaken to connect entities separated by a boundary.” (Søderberg & Romani, 2014). While the literature on boundary spanning often identifies actors with management responsibilities as boundary spanners (Levina & Vaast, 2008) it is by no means a role that can be fulfilled solely by actors with managerial responsibilities. Rather, all actors can be boundary spanners, but the literature on boundary spanning signifies that boundary spanners must possess certain qualities. For instance Langan-Fox & Cooper (2013) assess that boundary spanners must have “a diverse knowledge base, draw on a wide range of expertise” (p. 1) and continue characterizing the boundary spanners as follows: [they] “are change agents, are flexible, mobile, multi-skilled, and more than anything, connected and networked across a wide range of people in departments and units, both inside and outside the organization. Such individuals become legend and folklore in organizations: they are individuals who everyone wants to know, or, would like to know and to be seen with. Influence and

power accrues to the effective boundary spanner” (ibid.) However, it is worthwhile noticing that boundary spanning is not necessarily an activity that actors engage deliberately in. Indeed, in some cases boundary spanning is a conscious effort, but actors may also be engaging in boundary spanning inadvertently (Levina & Vaast, 2013).

Thus, while boundary spanners can be found in all parts of the organizational hierarchy, it requires *power* to be a successful boundary spanner. Such power may be gained from a relative surplus of “economic, intellectual, social, and symbolic capital” (Levina & Vaast, 2008: 323) accumulated by the boundary spanners. That is, the boundary spanners are dependent on for instance managerial position (symbolic and economic capital), their subject matter expertise, experience or educational background (intellectual capital) or their connectedness in the organization(s), which enable them to use their network (social capital) to span boundaries. Thus, actors “who have accumulated more capital than others are able to influence others and maintain their own privileged positions” (Levina & Vaast, 2013: 288)

While boundary spanning always has the purpose of connecting two or more groups in some way or another, the goal of the boundary spanning activities fall – according to Levina & Vaast (2013) – in two categories, transactive and transformative, “depending upon whether its practices preserve or transform the shared fields of practice in which they take place” (Levina & Vaast, 2013: 287). The aim of *transactive* boundary spanning is to provide translation across the boundaries and to transfer information between different contexts. The transactive boundary spanner is in other words preoccupied with making sure that transactions are handled as smooth and frictionless as possible. On the other hand, *transformative* boundary spanning aims at producing novel relations among actors, where the boundary spanner’s role is to act as both translator and negotiator with the purpose of changing the ways actors interact. In the words of Söderberg & Romani (2014) the “[t]ransactive mode preserves existing

relations in the shared fields of practice in which they take place, whereas [the] *transformative* mode changes the shared fields of practice in which they take place” (p. 4).

The conceptualization of boundary spanning as two different modes, namely transactive and transformative, resembles ‘The Boundary Spanning Leadership Model’ developed by Palus et al. (2013), where the authors argue that boundary spanning progresses from a *great divide* characterized by actors belonging to distinctively different groups with no (known) commonalities to a state of *nexus effect* where “ideas connect in new ways at the intersection of group boundaries, creating something new, facilitating a significant change, or solving a problem that can only be realized when groups work together” (Palus et al., 2013, 211).

Palus et al. (2013) found six categories of boundary spanning practices, namely *buffering*, *reflecting*, *connecting*, *mobilizing*, *weaving* and *transforming*. Palus et al. (2013) explain that three “successive strategies for boundary-spanning organize the practices: The initial strategy of *managing boundaries* (featuring the practices of buffering and reflecting) leads to the strategy of *forging common ground* (featuring the practices of connecting and mobilizing), and finally the strategy of *discovering new frontiers* (featuring the practices of weaving and transforming)” (p. 211) are progressed through in order to obtain the nexus effect. The model devised by Palus et al. (2013) connects very well to contributions on boundary spanning from other streams of literature (Søderberg & Romani, 2014), such as, for instance, the Mapping-Bridging-Integrating model (DiStefano & Maznevski, 2000) coming from the literature on cross-cultural management.

Arguably, the first three practices where group identities are defined within each group (buffering); where groups are sensitized to each others’ values and expertise (reflecting); and where person-to-person linkages are established in order to establish inter-group trust (connecting) enable the groups to interact in a transactive way. The

two following practices, where a common purpose and shared identity across groups are crafted (mobilizing); and where the groups are encouraged to maintain their own distinctiveness while integrating each group in a larger common whole (weaving); are practices aimed at being able to cross boundaries and create new identities (transforming).

Palus et al. (2013) explain that the sixth practice, transforming, “can be thought of as a gestalt, as the integrated totality of the six boundary-spanning practices. It is the explicit intent of transforming that defines it as a practice – to crosscut boundaries of identity in search of new and emergent possibilities. When this occurs, problems that were previously intractable can be resolved, and solutions that felt far beyond reach, become not just viable but fully realizable. This is the Nexus Effect fully realized” (p. 215). This suggests that when the nexus effect is realized boundaries are effectively spanned and become non-boundaries and what were earlier two groups, is now one common group where the earlier work practices are transformed and the group is reaping the benefits of the transformative boundary spanning efforts. When reaching this stage the boundary spanner has rendered himself obsolete.

Boundary Spanning and Trustworthiness

Palus et al. (2013) argue that the practice of *connecting* is important to build trust between actors from different groups. Consequently, in order to obtain effective transactive as well as transformative boundary spanning they see trust as a necessary mean – and something that happens in a specific practice, the practice of connecting. While I do agree to the necessity of trust I argue, however, that we must refine our view on trust and acknowledge that trust is not something that is stable and has a “once implemented it will work forever” logic to it. Rather, trust is, as I have argued in Chapter II: ‘Theory on Trust’ an ongoing process, characterized by suspension (Möllering, 2006). Rather than confining the important trust building, I argue that it should be conceived of as an ongoing process that starts with the practice of *buffering*

and continuous throughout the practice-spiral to *transforming*. I argue that this processual view on trust building is already – inadvertently – build into the ‘Boundary Spanning Leadership Model’ developed by Palus et al. (2013). However, a more refined view on trust is needed to excavate how the model can in fact be seen as a model for trust building. To elaborate, I will walk through the six steps of the model with a trust perspective in mind.

The cornerstone of the first practice, *buffering*, is to create safety. Palus et al. (2013) point out that actors “cannot collaborate effectively across boundaries until they first feel protected and safe within their own group” (p. 212). Therefore, they suggest practicing differentiation before pursuing any form of integration between the groups, which many “find counterintuitive and mistakenly pursue integration before the groups feel sufficiently safe within their own identities” (ibid.). I argue that this practice of creating a safe environment is in fact the first step towards establishing trust as it “enhances members’ willingness to share their knowledge and skills, and as a result, they are not only better able to identify and utilize more effective performance strategies” (Schaubroeck et al., 2011: 864). As I have argued in Chapter II: ‘Theory on Trust’ a perception of psychological safety improves team members’ engagement as they are not refraining themselves from sharing ideas and expressing opinions, due to fear of unknown consequences. The primary aim of the second practice, *reflecting*, is to foster respect among inter-group actors by gaining insights into each other’s values and expertise. Again, this is closely tied to trust building, insofar the foundation for a trusting work environment is positive assessments of the counterpart’s abilities, integrity and benevolence, which to a great extent is synonymous with values and expertise. The third practice, *connecting*, is aimed at linking actors across groups on an individual level and hereby establish “*inter-group trust* – a state of mutual confidence and integrity that develops when boundaries are suspended and new relationships are built” (Palus et al., 2013: 213). What is important is to note that this trust cannot and will not be created without the two prior practices. Arguably, Palus et al. (2013) treat

trust – as much of the management literature – as the salt and pepper of the recipe for a effective organizational setup: It is hardly given attention, but considered as something that “should just be there”. However, I argue that Palus et al. (2013) implicitly (and inadvertently, I suspect) have established a reasonable foundation through the first two practices, to actually be able to say that trust can and should be created by *connecting*.

While I do agree that an initial level of trust can be established by the means of *connecting* I argue that trust development only starts here. It is not a strong form of trust and it is not the only form of trust that is necessary in an effective inter-organizational collaboration. The fourth practice, *mobilizing*, evolves around building a community with a common purpose and a shared identity. Arguably, this is also an important step in the creation of trust. However, it is a different kind of trust that is at stake here, namely a *collective* form of trust, where actors cannot solely rely on interpersonal trust across boundaries, but must also develop trust in ‘the other’ group as well as the new shared group i.e. the community. In order to develop such a community and mobilize actors to engage in doing so, assessments of trustworthiness again become important; however, this time at a collective level. Consequently, actors must be able to assess ability and integrity at a collective level – that is, of the other organization. This *collective* trust becomes even more important in the fifth practice, *weaving*, where “new collaborations across groups with a common purpose” (Palus et al., 2013: 215) is instigated as these new collaborations result in “*inter-group interdependence* – a state of collaborations and collective learning that develops when boundaries are interlaced within a larger whole” (op.cit. p. 215). The keyword here is *interdependence*, signifying that the nature of the relationship changes from a state where the collaborators are not directly dependent on each other to complete a task, to a situation where they are. Such interdependence introduces the need for higher levels of trust as the risk is substantially higher, when one is dependent on another party to

fulfill one's own obligations than in situations where the contribution of others does not directly affect one's ability to perform own tasks, but "only" the overall result.

The sixth practice, *transforming* is defined as "the integrated totality of the six boundary-spanning practices" (Palus et al., 2013: 215), where the actors recursively "cut against the grain of their respective boundaries, thereby opening themselves up to change" (ibid.). Arguably, this requires that the perception of groups change from being an 'us and them' thinking to an 'us' thinking; and in terms of trust this movement towards 'us' thinking requires that trusting behavior is "more affective and intuitive rather than calculative" (Schaubroeck et al., 2011: 865). Trust thus shifts from being solely cognition-based to also being affect-based, on an organizational level. Within the vast majority of trust literature collective forms of trust are assumed to be purely cognitive (Schoorman et al., 2007). This is countered by Kroeger & Bachmann (2013) who maintain that "actors can develop normative [affect-based] trust in an organization" (p. 260) if and when they can relate to the guiding ideas and values of that organization. Consequently, affect-based trust in an organization relies on "having formed a correct impression of the organization's normative principles" (ibid.), which I argue is necessary in order to open up to changes imposed by the break-down of group boundaries and establishment of 'us' thinking as the sixth practice of *transformation* requires.

Two Types of Boundary Spanners: Intermediaries and Connectors

The third practice devised by Palus et al. (2013) is, as said about *connecting*, which they elaborate as a practice where person-to-person linkages are established. The choice of the word, *connecting*, is important here because it outlines the core activity of the boundary spanner, namely as someone who *connects* actors from disparate groups to each other. As opposed to this one could also devise of a boundary spanner as an *intermediary* stands between two groups of actors and acts as a translator. A boundary spanner acting as an *intermediary* may, in the short run, arguably achieve the

same result, namely effective collaboration between two groups. However, I argue that there is a significant difference between the two types of boundary spanning in the longer run. Arguably, the success of an intermediary is tied to an immediate, practical and instrumental connotation, it is about making effective collaboration possible as fast as possible. In contrast, succeeding as a connector is essentially about rendering oneself unnecessary. That is, when a boundary spanner acts as a connector he is supporting actors from the two groups in interacting directly. To stay with the translation metaphor employed earlier, one can say that the connector essentially helps actors learn each other's languages or find a common language.

The difference is also important because it addresses two different scholarly perspectives on boundaries, namely a *social institutionalized* perspective and an *emergent and dynamic* perspective (Corporaal et al., 2013). In the social institutionalized perspectives boundaries are conceived of as relatively stable and demarcating discontinuity in context and relations (Santos and Eisenhardt 2005), whereas the perspective on boundaries as emergent and dynamic emphasizes that boundaries are socially constructed as they arise from differences in practice (Levina and Vaast 2008, Watson-Manheim et al. 2012) and thus also are subject to change, when practices change. Given my social constructivist stance, I argue, in line with both Levina & Vaast (2008; 2013) and Palus et al. (2013) that boundaries are indeed emergent and dynamic and thus *connecting* what at first seem as disparate groups is indeed possible, which, in the longer run can facilitate that the actors engage directly with each other without the aid of the boundary spanner. This does not suggest that adhering to an emergent and dynamic social constructivist perspective rejects that boundary spanners can – and do – act as intermediaries, but merely that it is possible to act as a connector and influence the negotiation of boundaries, too.

Trust-Preparatory Boundary Spanning Activities

Above I have argued how 'The Boundary Spanning Leadership Model' developed by Palus et al. (2013), by the means of the review of trust literature provided in Chapter II, can be utilized as a model for trust development. I have pointed to how the six practices of boundary spanning need to be expanded in order to cater for trust development. Thus, I have argued that trust is not something that can be established as "by the flick of a switch" in a specific practice, but rather something that must be carefully catered for throughout the boundary spanning practices. By doing so, I argue that 'The Boundary Spanning Leadership Model' is significantly augmented, but at the same time this model provides a significant and solid foundation for understanding how boundary spanning and trust development intersect.

Furthermore, I have tentatively aligned 'The Boundary Spanning Leadership Model' with Levina & Vaast's (2013) two modes of boundary spanning. Below is an illustration of how the six practices devised by Palus et al. (2013) and Levina & Vaast's (2013) two modes of boundary spanning are connected (figure 8.1).

The model furthermore aligns the main objectives for creation of trust that I have presented above with the theoretical constructs from Palus et al. (2013) and Levina & Vaast (2013). Finally, the model introduces what I call *trust-preparatory boundary spanning* which I will attend to in greater detail below.

The Role of Boundary Spanners in Development of Trust in Inter-Organizational Collaborations

Main Boundary Spanning Objectives (Palus et al., 2013)	Create Safety	Foster Respect	Build Trust	Develop Community	Advance Interdependence	Enable Reinvention
Boundary Spanning Practices (Palus et al., 2013)	Buffering	Reflecting	Connecting	Mobilizing	Weaving	Transforming
Main Objective for Creation of Trust	Create Psychological Safety	Assess Ability and Integrity	Establish Interpersonal Trust	Assess Collective's Ability and Integrity	Establish Collective Trust	Establish Collective Affect-Based Trust
Mode of Boundary Spanning (Levina & Vaast, 2013)	N/A		Transactive Boundary Spanning		Transformative Boundary Spanning	
Trust-Preparatory Boundary Spanning Activities	... at the Interpersonal Level			... at the Collective Level		

Figure 8.1

In line with Palus et al. (2013) I conceive of the first two practices as preparatory as they are preambles to actual collaboration. Consequently, they are sequentially placed before what Levina & Vaast (2013) call transactive boundary spanning and are a necessary preparation for the same. Thus, in terms of trust development the main objective for the boundary spanner is to establish a foundation for trustful collaboration by first creating psychological safety within the group and subsequently to facilitate assessments of “the other’s” ability and integrity. I call this *trust-preparatory boundary spanning activities at the interpersonal level*. If this boundary spanning activity is completed successfully (and provided that the actors find reason to make positive assessments of their counterparts’ abilities and integrity) the actors can engage in a transactive boundary-spanning mode characterized by interpersonal trust.

Insofar, the organizational goal is to “transform the shared fields of practice” (Levina & Vaast, 2013: 287) and thus proceed to a transformative mode of boundary spanning, the next challenge is to establish collective trust. In order to do so the boundary spanners are tasked with paving the way for assessments of ability and integrity at a collective level. That is, to assist the actors from one organizational entity in (positively) assessing the other organizational entity at a collective level, where it is the *organization’s* ability and integrity, rather than that of the individual counterparts that is assessed. This boundary-spanning effort initially takes place in parallel with actual collaboration among the actors, who at this point in time is engaged in a transactive mode of collaboration. However, in order to achieve the highest level of collaboration – and experience the *nexus effect* (Palus et al., 2013) – there is a second step to the *trust-preparatory boundary spanning activities at the collective level*, namely the facilitation of affect-based trust. According to Palus et al. (2013) actors will only be able to engage in the sixth practice of *transforming* and unleash the potential of enabling reinvention insofar they can relate to each other across groups in a way where they conceive of themselves as belonging to a common ‘us’, which requires them to be able to positively relate to the guiding ideas and values (Kroeger & Bachmann, 2013) of what was initially perceived as “the other group”. Arguably, this requires positive assessments of benevolence (Meyer et al., 1995) and thus the challenge for the boundary spanners in terms of establishing trust is to facilitate that actors are positively relating to the other group’s values; and where the actors “develop and institutionalize repertoires or ways of signaling trust and trustworthiness” (Kroeger & Bachmann, 2013: 254) across groups.

At the outset of this chapter I introduced the research sub-question: *What is the role of boundary spanners and how do these boundary spanners influence perceived trustworthiness of vendor-side actors and the vendor organization in the eyes of the client-side actors?* By taking departure in the analytical identification of groups in the empirical context laid forth in Chapter VII: ‘Trusting Across Cultures’ I will first

describe the boundary spanners' position in the empirical field; and by means of the analytical model devised above I will analyze how the boundary spanners influence trustworthiness, by focusing on *trust-preparatory boundary spanning activities at the interpersonal level* and *trust-preparatory boundary spanning activities at the collective level*, respectively.

As the main concern of this chapter is to understand how the boundary spanners influence trustworthiness specifically and not as such how the boundary spanners in general influence collaboration the boundary spanning theories from Levina & Vaast (2008; 2013) and Palus et al. (2013) introduced above will not be the main focus. These theories have been introduced to devise of an analytical framework in which I can capture how trustworthiness and boundary spanning is connected, not to be analytical instruments in their own right. Thus, the terminology provided by Levina & Vaast (2008; 2013) and Palus et al. (2013) will be put to use when relevant in the trust and trustworthiness discourse.

Boundary Spanning Actors' Position in the Field

In Chapter VII: 'Trusting Across Cultures' I have identified three significant, socially constructed groups in the empirical field and thus also three boundaries that requires boundary-spanning activities: a national boundary, an organizational boundary and a geographical boundary. Similar to all three groupings is that the client-side actors stands on one side and the offshore vendor-side staff on the other – however, the latter with a few notable exceptions, namely the actors who as per their job descriptions are bound to have frequent contact with the client-side actors. Between these two groups stand the native Danish vendor-side actors and the onsite-allocated Indian vendor-side actors, who – as argued in Chapter VII – are fast enrolled in the group of the *knowledgeable few*, when they are deployed onsite and as a consequence span organizational and national boundaries. Thus, four *clusters of boundary spanners* surface: The native Danish vendor-side actors; the Indian vendor-side actors deployed

onsite; the vendor-side actors who given their functional roles act as intermediaries; and the OMC management team, which I label *the managerial boundary spanners*. In the remainder of this section I will take a closer look at how the four clusters of boundary spanners are positioned as boundary spanners.

Common to all four clusters of boundary spanners is that they are all employed in the vendor organization. However, while their organizational affinity is of course relevant, I have – for the sake of readability – chosen to designate them without their organizational affiliation. Hence, the four clusters of boundary spanners will be designated as a) the Danish boundary spanners, b) the onsite-deployed boundary spanners, c) the functional boundary spanners, and d) the managerial boundary spanners in the remainder of this chapter.

The Danish Boundary Spanners

Throughout my fieldwork it has become abundantly clear that the native Danish vendor-side actors are instrumental in making the collaboration between the vendor and the client work. They have a privileged position due to their dual organizational affiliation: All of them are former employees of the client, who during the first wave of outsourcing were moved to the at-that-time vendor and subsequently, when the new vendor was chosen, they became employees of the vendor. The client-side actors perceive them as colleagues and they perceive the client-side actors as colleagues, too (see Chapter V for a more elaborate discussion of this). Furthermore, the vendor-side actors acknowledge their importance and find them instrumental to the collaboration, as they “understand the environment [...] and [can] translate that to the offshore [actors] [...] bringing that knowledge to us” (Interview #23).

By observing office life at the client’s office it does not take much time to realize that this cluster of boundary spanners take up an important role. They are approached by the client-side actors several times each day, where they are asked to look into some more or less concrete issues and they do so willingly. In a similar way, they are often

used by the offshore vendor-side managers and employees to convey messages, solve problems and act as intermediaries, when something complex or something which constitutes a potential problem, such as a negative report on progress that needs to be conveyed to the client-side. Interesting, however, is not just what this cluster of boundary spanners do, but also *how* they do it. By and large they are used as *intermediaries*. That is, when something complex or problematic needs to be conveyed from one group to another, they are put in charge of communicating this, but they do so in a fashion where a message is given to them and they convey the message without directly involving the originator of the message. To a certain extent this resembles the character of the messenger we know from old western movies, who are trusted with an important message, which he crosses the prairie in all kinds of weather to faithfully convey to the recipient.

Interestingly, and continuing the analogy – it seems they never have to wear protective armor or a sign saying “Don’t shoot the messenger”. In Shakespeare’s tragedy ‘Antony and Cleopatra’ the latter threatens the messenger who is conveying that Antony married another, to which the messenger replies: “gracious madam, I that do bring the news made not the match”. However, in this empirical context it seems that such a disclaimer is not needed. On numerous occasions I have overheard bad news conveyed to the client-side actors by the Danish boundary spanners and in no instance has the discontent about the message displayed by the client-side actors been aimed at the messenger, but rather at the vendor organization.

In a similar vein, I have on several occasions observed phone meetings between the client-side actors and the vendor-side actors, where one of the Danish boundary spanners has been present. Just like the Danish boundary spanners are able to interact in the open-office setting explained above without “being shot”, his role in the phone meetings are also executed without the boundary spanner being in the line of fire himself, despite critical comments made by the client-side actors on the vendor’s way

of handling certain tasks and issues. On the contrary, I have on two such occasions observed how one of the client-side actors have muted the microphone in order to discuss why “they” – that is, the vendor-side actors – are not handling a task the way it is expected. On these two occasions the boundary spanner has clearly not been considered as a member of “them” by the client-side actors, but on the contrary treated as a colleagues, as a part of the “us” by the client-side actors (Field Notes 20130213; 20130910).

With regards to the relationship between the Danish boundary spanners and the Indian vendor-side actors, the Danish boundary spanners are also used as *intermediaries*. The Indian vendor-side actors – both offshore and onsite – all speak highly about the Danish boundary spanners and stress their importance in the collaboration. However, it is worthwhile noticing that they do so without expressing any form of collegiality. They are perceived as instrumental in the collaboration, but even though they are formally employees of the vendor’s organization, they are not thought of as colleagues, as the quote below illustrates:

*“Obviously if we have our **own** resource we don’t have to spend as much as **we** do on them and if you know that your resource in India can do the job over here, then obviously we will have them [Indian vendor-side actors] here. The reason they are here **is** we don’t have a guy for that place yet.”*
(Interview #5 – vendor-side actor)

In the quote I have underlined how the Indian vendor-side actor constructs us versus them dichotomies and it is clear that the Danish boundary spanners are excluded from the we-group, consisting of the rest of the vendor-side team.

Within the boundary spanning literature a boundary spanner is characterized by being connected and having a network across a wide range of people (Langan-Fox & Cooper, 2013). With regards to the Danish boundary spanners it is striking how the relationship

with actors from their own organization is characterized by lack of connectedness and network. Thus, it is by no means surprising that their role as boundary spanners is by and large limited to that of an intermediary. While the client-side actors treasure them as colleagues, they simply do not enjoy a position in their own organization that enables them to *connect* actors from the two groups.

The Onsite-Deployed Boundary Spanners

The onsite-deployed vendor-side actors constitute a second group of boundary spanners. As I have shown in Chapter V: ‘Challenged by Distance’ the vendor-side actors that are deployed onsite quickly enjoy positive assessments of their abilities, integrity and benevolence and, as argued in Chapter VII: ‘Trusting Across Cultures’ they are rapidly included in the group of the *knowledgeable few* when they start to work at the client’s premises.

Within their own organization they are also considered important actors, whose engagements and abilities are praised by the vendor-side management (Interview #23; Field Notes 20130909, 20131219) and thus they are not selected as the vendor’s onsite representatives by chance, but rather because their competences are assessed as important assets at or in the client’s organization. Throughout my observation studies as well as during interviews it has become evident that they, much like the Danish boundary spanners, act as *intermediaries*, whose presence eases communication of complex or problematic issues. But in addition to their role as intermediaries I have on some occasions also observed them act as *connectors* by explaining organizational processes in the vendor organization to client-side actors; by referring client-side actors to subject matter experts in the vendor organization; introducing the client-side actors to them; and by emphasizing significant contributions and competences by offshore vendor-side actors during phone and video meetings. These kinds of boundary spanning activities are worth noticing, because they constitute examples of trust-preparatory boundary spanning activities in which the onsite-deployed boundary

spanners use the trust bestowed in them to render their offshore colleagues and their organization trustworthy in the eyes of the client-side actors. I will return to this point later in this chapter in much greater detail.

The Functional Boundary Spanners

The third cluster of boundary spanners, the functional boundary spanners, is comprised of various actors who are assigned a boundary spanning role vis-à-vis their functional role. Specifically, the cluster consists of the two incident managers and the change manager. Arguably, this cluster consists of actors with quite different roles. However, they also have significant similarities, namely that they are all working in India at the OMC and thus far away from the client-side actors, and their abilities to interact face-to-face with client-side actors are limited to once or twice per year. Furthermore, given their functions all entail the role of an intermediary however in different scenarios.

In Chapter VI: ‘Flipping the Switch on Trust and Control’ I have shown how the incident managers are instrumental in communicating the occurrence of critical incidents as well as the progress, challenges and resolve of the same. They do so by adhering strictly to a standardized process, where they are in charge of engaging with the client-side actors themselves but also for assembling a team at the OMC and coordinating conference calls, where the OMC team briefs the client-side actors on the current status and next steps in resolving the issue. As I have also shown in Chapter VI: ‘Flipping the Switch on Trust and Control’ the relationship between the incident managers and the client-side actors is amicable and the incident managers are acknowledged and rewarded for their good work. Thus, much like the onsite-deployed vendor-side actors, the incident managers are trusted by the client-side actors and can use their position as trusted collaborators to further the trustworthiness of the OMC staff as well as the vendor organization and hereby ultimately facilitate trustful relations.

Much like the incident managers, the vendor-side change manager is also instrumental in coordination between client-side and vendor-side actors, when changes to the technical infrastructure are implemented. However, as the change manager – as reported in Chapter VI: ‘Flipping the Switch on Trust and Control’ – does not enjoy the same level of acknowledgement by the client-side actors as the incident managers do, the change manager does not have the same privileged position from where he can engage in trust-preparatory boundary spanning between the two groups. Continuing the analogy from earlier in this chapter, the change manager is quite often in a position where he is taking the heat for the vendor-side team’s lack of adherence to the standard processes related to change and release management. An example is the very first change board meeting I observed (Field Notes 20130219), where one of the client-side actors engaged with a vendor-side technical lead responsible for the technical part of a specific change. The client-side actor was repeatedly asking about the technical solution to make sure that this solution did not conflict with other pending changes. Prior to this questioning the change manager had asked the client-side actor if he had any questions and after posing his questions and getting satisfactory replies from the technical lead he mutes the microphone and says: “Dammit, that is what he [the change manager] is supposed to ask about before the meeting. That’s *his* job” (Field Notes 20130219).

The situation above is very illustrative for the relationship between the client-side actors and the vendor-side change manager as it clearly shows that the client-side actors do not trust the vendor-side change manager to perform what they perceive as his duty and that they need to take on control – not to make sure the change manager got it right, but to make sure that it is done at all. Arguably, had the change manager enjoyed the same level of acknowledgement of his competences and engagement as is the case with the incident managers, the onsite-deployed vendor-side actors and the Danish boundary spanners, the situation would be different. In such a case the trust

bestowed in him could facilitate trust in the offshore vendor-side actors and in the vendor's ability to meet expectations.

The Managerial Boundary Spanners

The last cluster of boundary spanners, the *managerial boundary spanners*, consists primarily of two actors, namely the Head of the OMC who is also the Service Delivery Manager for operations and the Service Delivery Manager for application development, who reports to the Head of the OMC. The role of these two boundary spanners evolves around managing their subordinates, the vendor-side actors, head problem solving in critical incidents and engage with client-side managers in strategic development of the collaboration as well as report on the work being done on an aggregated level. That is, they have a dual role, where they are the primary contact persons for strategic issues for the senior managers in the client's organization and they are the primary representatives for the vendor when problems arise, and those who engage with the operative client-side actors. On occasions other vendor-side actors are brought in for specific purposes and assist or supplement the two primary boundary spanners in this cluster. For instance the global head of the media industry service line is brought in on strategic discussions that exceed the scope of the current contract and heads of specialized units are brought in to discuss their specific areas of expertise if the vendor sees an opportunity to engage with the client in a new area.

The cluster of managerial boundary spanners has an important role in representing the vendor organization towards the senior management from the client and given their engagement with client-side decision makers they are arguably instrumental in bringing in new business from the client as well as maintaining the current level of business. The importance of this cluster of boundary spanners is substantial given the fact that they are the only interface the client-side CIO, who is the overall responsible for the outsourcing engagement, has with the vendor organization. In his own words, when asked about the frequency and type of communication he has with the vendor-

side actors: “No interaction. Only with the managerial level – and in an ordinary week I do not have contact with them. Zero – not a single email or anything. We have a steering group meeting once a month, that’s it” (Interview #4). Thus, in addition to standardized reports and input from his own subordinates, the highest ranking officer in the client’s IT organization makes decisions based solely on input from the *managerial boundary spanners* from the vendor’s organization.

Trust-Preparatory Boundary Spanning Activities

Within the offshore outsourcing collaboration the four clusters of boundary spanners are all, in each their way, instrumental to bridging boundaries and connecting groups. As I have argued in the theoretical section of this chapter the boundary spanners are charged with two primary tasks in order to facilitate trust between groups. First, they are to engage in trust-preparatory boundary spanning activities at the *interpersonal* level in order to facilitate interpersonal trust between individual members of the different groups; it includes establishing *psychological safety* within the group and subsequently, at the individual level, rendering *positive assessments of actors* from the other group possible. Secondly, they are to engage in trust-preparatory boundary spanning activities at the *collective* level in order to facilitate trust in the other group, which includes rendering positive assessments of the other group possible at a *cognitive level* and subsequently at an *emotional* level.

At the Interpersonal Level

With regards to the perception of psychological safety among the client-side actors I maintain that a psychological safe work environment is well catered for. Among the client-side actors there seems to be a strong cohesion. They support each other and throughout my observation studies it has become clear to me that they also enjoy a great deal of management support from client-side senior managers. The senior management repeatedly mentions the importance of the client-side actors in running the outsourced IT-setup; and among the client-side actors there is a strong sense of

collegiality and mutual respect. Arguably, the historical background of IT-outsourcing in the client company contributes positively to the feeling of psychological safety among the client-side actors. Unlike many other outsourcing endeavors, where a certain percentage of the total workforce is outsourced and the remaining employees live with a constant anxiety of being ‘next in line’ in terms of being laid off and substituted by less salary-heavy resources offshore, this specific outsourcing engagement outsourced *all* IT and had only one IT-employee remaining back in 2007. His task was to build a new client-side IT-organization capable of managing the outsourced IT activities. That is, all current staff has been hired to do exactly what they are doing. Furthermore, the internal IT-department has been growing steadily over the last five years, with no examples of employees being laid off due to increased outsourcing – on the contrary, the complexity of engaging in full-scale outsourcing has demanded more internal resources.

However, while Palus et al. (2013), stress the importance of establishing safety *within* the group, this does not mean that external factors do not have an impact on the perception of psychological safety among the client-side actors and, given their position, the boundary spanners are the ones whom the client-side actors’ psychological safety is most prone to be influenced by. However, I argue that none of the four clusters of boundary spanners have a negative impact in the client-side actors’ perception of psychological safety: The Danish boundary spanners are by and large considered colleagues; and the onsite-deployed boundary spanners are quickly adopted into the group of the knowledgeable few by the client-side actors, and there is absolutely nothing that suggests that the client-side actors see their presence as threatening in any way. On the contrary, the onsite-deployed boundary spanners are seen as a positive asset with regards to improving the offshore-outsourcing collaboration. Finally, the managerial boundary spanners as well as the functional boundary spanners are also acknowledged as important in order to obtain a sound collaboration. Despite the skepticism towards to specific change manager’s abilities the

client-side actors acknowledge the importance of the role and do not in any way seem negatively affected in terms of psychological safety. That is, despite their doubt in the vendor-side change manager's ability to perform the change management role, this does not seem to affect their perception of psychological safety. All things considered, one can only characterize the client's internal IT-department as a psychological safe environment.

Arguably, the perceptions of psychological safety are in place among the client-side actors. Thus, the next step in order to facilitate trust between the groups is for the boundary spanners to facilitate positive assessments of members of the other group at an *interpersonal* level. However, facilitating such assessments at an interpersonal level requires that actors from the two groups be exposed to each other. Arguably, the cluster of boundary spanners I have labeled *the functional boundary spanners* - the incident managers and the change manager - do exactly that in each their way by introducing vendor-side actors working on a given task to the client-side actors, and the *managerial boundary spanners* also contribute to establishing interpersonal connections between actors from the two groups, for instance by putting subordinates in the driving seat at team presentations during the client's visit at the OMC, where the head of the OMC consequently took upon himself a very anonymous role and made room for his subordinates to engage directly with the client-side actors. During one of my first one-on-one talks with the Head of the OMC I cautiously enquired about how he perceived his own role, because I - given my previous experience in working with Indians and engaging with Indian managers - found his somewhat anonymous approach striking and unusual.

He explains to me that it is very important for him to empower his people. To have them talk themselves and meet with the client-side visitors. (Field Notes 20130910)

During later talks, when I re-visited the OMC early in 2014, we had a chance to talk more about this role. At one point during this visit and after I had had the chance to get to know him better and build a better sense of rapport we were in his car on the way out to dinner and I told him that I found his approach striking, for the very reason mentioned above. He explained to me that he saw it as a central part of his job to aid his subordinates in engaging directly with the client-side actors and added that he was well aware that his management philosophy was somewhat different than most Indian managers, but that his experience nevertheless told him that it was important for the success of the collaboration that the managers do not become bottlenecks (Field Notes 20140123).

Thus, both of the offshore clusters of boundary spanners are using their own positions to facilitate interaction between client-side and vendor-side actors. They act as *connectors*. The same cannot be said about the two clusters of boundary spanners stationed onsite, at the client's premises in Denmark. While they are arguably the two most significant clusters of boundary spanners by virtue of co-location and their daily contact with the client-side actors, they are predominantly acting as *intermediaries*, who take on tasks from the client-side actors *front stage*, engage with the relevant vendor-side actors *back stage* – invisible to the client-side actors, and reappear *front stage* with a solution. Thus, how such tasks are solved are rendered invisible to the client-side actors; it is a *black box*, where vendor-side actors unknown to the client-side actors engage in problem solving of which the outcome is presented by the two clusters of onsite boundary spanners. While this may to some extent be efficient and in line with the tactical purpose I claim that it is also problematic, which I will return to when I discuss opportunities for advancing trustworthiness later in this chapter.

At the Collective Level

In order to engage in a transformative mode of collaboration where the actors from each group are willing and able to adapt to each other's ways of working and transform

their own work practices it is arguably necessary to establish trust at a collective level. In order to do so the “other” collective must be assessed as trustworthy by actors on an individual as well as an aggregate level. Thus, the question is whether and how trustworthiness assessments of the vendor-side organization are rendered possible to the client-side actors by the four clusters of boundary spanners. We have already established that the client-side actors perceive all four clusters of boundary spanners (with the notable exception of the change manager) as trustworthy. The client-side actors are thus willing to place important tasks in the hands of the boundary spanners. However, the interesting question is whether the boundary spanners when acting as intermediaries are ascribed indispensability or if a continuous perception of success is ascribed to collective ability and integrity of the vendor organization. Are the boundary spanners assigned prerogative traits; or do the client-side actors perceive them, over time, as interchangeable with other vendor-side actors with similar qualifications?

Before commencing into an analysis of collective trustworthiness in the specific case a few words on what a *collective* is, is necessary. As the word suggests a collective is a collection of actors grouped together. In this perspective rendering assessments of trustworthiness possible is a question of rendering *enough* individual actors’ trustworthiness and by doing so enabling the client-side actors to draw generalized conclusions about the collective based on a foundation of an adequate number of positive assessments of trustworthiness. In other words, the boundary spanners must connect the client-side actors to an arbitrary number of vendor-side actors, depending on the “trust thresholds” of the client-side actors. That is, the client-side actors will assess the collective as trustworthy when they have assessed enough individuals as trustworthy to conclude that it is *representative* for the vendor organization. If we follow this line of thinking about collectives, one can argue that facilitation of assessments of the collective’s trustworthiness are impeded by the aforementioned black boxing of tasks because this practice renders the offshore vendor-side staff

invisible to the client-side actors. The argument applies to the onsite-deployed boundary spanners as well as the Danish boundary spanners who are routinely black boxing the contributions of the offshore vendor-side actors. By “protecting” the client-side actors from understanding the nature of the contributions of the offshore vendor-side actors, the client-side actors are effectively unable to assess the trustworthiness of them as they can only rely on insufficient control mechanisms, as argued in Chapter VI: ‘Flipping the Switch on Trust and Control’ as well as on the efforts carried out by the two last clusters of boundary spanners, namely the managerial boundary spanners and the functional boundary spanners, who, as described earlier are in fact *connecting* the client-side actors with the offshore vendor-side actors.

But we can also conceive of a collective as something different, namely something more than merely a bundling of individual actors. If we follow this line of thinking *connecting* is not the only way to render positive assessments of trustworthiness possible. Indeed, acting as an *intermediary* may actually be helpful to render positive assessments of a collective possible insofar the boundary spanners successfully manage to position themselves as actors speaking and acting *on behalf* of the collective. That is, a position where they function as a link between the two sides and where they actively engage with the client-side actors to promote the trustworthiness of the vendor’s organization and organizational capabilities and values. By doing so they are arguably able to use their own trustworthiness to promote the organization’s trustworthiness, not by connecting client-side actors to the entire organization, but by *representing* the organization. Let us take a look at whether, and how, this is done in the concrete empirical settings by the four clusters of boundary spanners.

By the very nature of their job the functional boundary spanners do to a high degree *represent* their organization, when they connect client-side actors with functional specialists at the OMC. Not because of the connecting itself, but rather because they demonstrate (or fail to demonstrate) their organization’s ability to execute the tasks at

hand. In my observation studies at the client's headquarters in Copenhagen, I have repeatedly witnessed how important well-functioning processes are to the client-side actors' perception of the offshore outsourcing collaboration. Thus, the smooth execution of processes as agreed upon seems to be an important aspect of trustworthiness in the eyes of the client-side actors; and the functional boundary spanners are indeed the primary representatives of such processes. I argue that the successful execution of these processes renders positive assessments of ability as well as integrity of the vendor organization. In a similar way, the cluster of managerial boundary spanners also represents their organization, both at an operational level, when they take charge of important tasks, and at a strategic level, when they engage with the client-side management to discuss improvements and new avenues for collaboration. When doing so, I have repeatedly observed them reference to how they have solved similar tasks for other clients (Field Notes 20130501; 20130815; 20130901; 20130911). This way, they utilize the trustworthiness vested in them by the client-side actors to promote their organization's abilities and integrity. These practices of *representing*, can also be described as the fifth practice from Palus et al. (2013), weaving, where the work practices of the groups are integrated in a larger common whole with consideration to the groups' own distinctiveness.

The two last clusters of boundary spanners – that is, the onsite-deployed boundary spanners and the Danish boundary spanners – are, as argued above, primarily acting as *intermediaries* and at the same time they are the ones with the highest degree of exposure to the client-side actors. By carrying out their jobs in a way that is acknowledged and appreciated by the client-side actors one can reasonably claim that they too are *representing* their organization and there is no doubt that their functions as being “the glue” (Interview #2) is instrumental in making the collaboration a success. However, it is striking that they, given their privileged position, do not seem to render assessments of trustworthiness at a more emotional level towards the collective

possible. During and after I accompanied the client-side delegation on the week-long trip to India, I spoke to several of the client-side actors, who expressed that they were positively surprised by the efforts, commitment and engagement that the offshore vendor-side actors show (Field Notes 20130911; 20130912, Interviews #11; #12; #15; #16). Interestingly however, when I during informal conversations while we were in India asked them what their impression of the OMC was, the first remark made by *all* of these client-side actors was not about the vendor-side actors professionalism, but rather about the positive impression they had had of the vendor organization's "softer" side. In each their way they expressed that they had benefitted by the visit to the OMC as they had come to understand that the vendor organization treat their employees well in terms of working conditions, such as a reasonable maternity leave; have a reasonable working environment in office, and are committed to an agenda of corporate social responsibility for instance by employing people with physical disabilities and giving to charity. All these things were surprising to them and instigated a much more positive attitude towards the vendor organization in the client-side employees as compared to their attitude prior to the visit.

Thus, I find it striking how little the client-side actors know about the "do-good" activities that the vendor organization engages in – striking how little is done to present the vendor as benevolent to the client-side actors. Arguably, the positive assessment of benevolence that facilitates affect-based trust is not just about benevolence in general, but rather about assessments of the trustee's benevolence specifically towards the trustor. However, I argue that the generalized and specific assessments of benevolence cannot and should not be separated. As elaborated in Chapter II: 'Theory on Trust' cognition-based and affect-based trust is hard to separate in practice as trusting is not an either-or state, where a trustor can have either cognition-based or affect-based trust in a trustee. Rather, the relationship between cognition-based and affect-based trust is a continuum, where "the impact of cognitive trust [cognition-based] fades and the impact of affective [affect-based] trust increases" (Greenberg et al., 2007: 332) over time. I

argue that establishing emotional bonds is not just a case of perceiving that the trustee has good will towards the trustor, but also a perception of the trustee being good-willed in general. That is, developing affect-based trust towards an actor, who is perceived as good-willed towards me, but ill-willed in general seems inconceivable. Thus, facilitating positive assessments of the vendor-side's benevolence in general is conducive for affect-based trust in the vendor.

The onsite boundary spanners do little, if anything, to facilitate positive assessments of the vendor's collective with regards to representing the vendor as benevolent in general, but how about the vendor's benevolence specifically towards the client? Throughout my observation studies I have not come across situations where client-side actors have reported of benevolent actions by the vendor organization. Surely, there are many episodes where *individual* vendor-side actors are perceived as benevolent towards the client (as reported in this chapter as well as Chapter V: 'Challenged by Distance'), but I have not encountered situations where the vendor organization as a collective is being perceived as benevolent. I speculate that this is not necessarily because the vendor-side actors do nothing to render the vendor organization benevolent towards the client, but rather has to do with the context, namely a contractual agreement, where the client-side actors assume, that any and all vendor-side actions that could appear to be signs of a benevolent collective are interpreted as a sort of "preventive maintenance". That is, the vendor organization is often perceived as accommodating beyond the scope of the contractual underpinning, but in every single instance I have been talking to client-side actors about such accommodating acts, the act has been acknowledged as being accommodating, but always followed by a comment on the underlying motive of keeping the client happy. For instance, one of the client-side actors told me that "they [the vendor] will do whatever it takes to keep us [the client] happy. We're a strategically important client – not necessarily the biggest, but we're important to showcase their [the vendor's] abilities to the

Scandinavian market” (Field Notes 20130423). This suggests that the vendor may actually be benevolent towards the client, but whether or not their actions are a token of benevolence or strategic thinking is practically unimportant, as the client-side actors never perceive these actions as benevolent, but rather as strategic.

Opportunities for Advancing Trustworthiness

Throughout this chapter I have shed light on four clusters of boundary spanners and their influence on client-side actors’ perceptions of vendor-side trustworthiness at an individual as well as a collective level. By the means of this analysis it should be clear that the four clusters of boundary spanners indeed play an important role connecting client-side actors with vendor-side actors in the offshore outsourcing engagement that constitute the empirical foundation for this dissertation.

I have argued that they do so by taking upon themselves a role of either an *intermediary* or as a *connector*. As argued earlier in this chapter the difference between those two roles is important, because they signify two distinctively different ways of acting as boundary spanners: The *intermediary* stands between two groups of actors and acts as a translator, whereas the *connector* engages actively in bringing the groups together. Thus, while the boundary spanner may in the short run achieve the same result by acting as an intermediary and by acting as a connector, namely effective collaboration between two groups, there is a significant difference between the two types of boundary spanning in the longer run: By acting as an *intermediary* the boundary spanner will continuously be the center of attention, a bottleneck so to speak. In contrast, by acting as a *connector* the boundary spanner will improve actors’ ability to collaborate and ultimately render himself unnecessary.

The vast majority of boundary spanning activities in the empirical context I am investigating are characterized by being intermediary actions. Interestingly, it seems that the two clusters of boundary spanners that are located offshore at the OMC are indeed acting as *connectors* when they connect their vendor-side colleagues with the

client-side actors, but the two clusters of boundary spanners located onsite at the client's office in Denmark are by and large exclusively acting as *intermediaries*. By doing so, I argue that they are in fact maintaining status quo or perhaps even fortifying the boundaries, rather than contributing to dissolving them. Let me elaborate on this claim.

As argued in previous chapters there are several factors that challenge the offshore outsourcing collaboration between the client and the vendor. First, the client-side actors experience lack of transparency at an organizational as well as an individual level. That is, they do not seem to understand how the vendor organization works with regards to functional division of labor. On the contrary, they perceive the vendor organization as characterized by silos and in order to cope with the complexities of the vendor organization, they turn to the trusted actors from the two clusters of onsite boundary spanners for help. Had the two clusters of onsite boundary spanners engaged with the client-side actors as *connectors* by helping the client-side actors to understand the organizational and functional structures of the vendor organization it is likely that the client-side actors would eventually come to terms with these structures, develop trust in the vendor and learn to navigate themselves without the need for an intermediary. In a similar vein, the client-side actors do not perceive offshore vendor-side actors as committed, engaged and proactive – that is, they do not perceive the vendor-side actors as trustworthy with regards to integrity and benevolence. In order to get things done, they approach the two clusters of onsite boundary spanners, who take upon them the responsibility of a given task and become intermediaries through which progress as well as challenges on the tasks is communicated. Second, the client-side actors perceive the offshore vendor-side actors as less knowledgeable, thus they do not perceive them as trustworthy with regards to ability. In contrast, the two clusters of boundary spanners working onsite are included in the group of the knowledgeable few and are used as knowledge intermediaries. That is, because the boundary spanners are

perceived as able, they are drawn upon by the client-side actors to explain business and technical details to the offshore vendor-side actors, instead of engaging in such an explanation themselves. While this practice obviously makes sense from the client-side actors' time-economy perspective and is indeed also in line with the very reason for having vendor-side actors stationed onsite, I argue that acting as transparency and knowledge intermediaries in the long run have a negative impact as the vendor-side actors working from onsite become increasingly indispensable, as this work practice becomes salient. In other words, when the boundary spanners are engaging as intermediaries and are successful in doing so the client-side actors perceive them as increasingly trustworthy with regards to ability, benevolence and integrity, while the perceived trustworthiness of the offshore vendor-side actors remains low or even non-existing.

Given the fact that these two clusters of boundary spanners are strategically placed onsite to ease the collaboration one could argue that acting as intermediaries is exactly doing what they are supposed to do, namely catering for a collaboration that is as frictionless as possible. However, if we return to the theoretical foundation for this chapter and the boundary spanning leadership model devised by Palus et al. (2013), we must acknowledge that when boundary spanners act as intermediaries the collaborating organizations miss out on the possibility of being woven together into a larger common whole and subsequently on creating new and common identities and practices and hereby transforming into one common group and working in a transformative mode, characterized by collective trust. Thus, acting as an intermediary in the longer run is problematic. As argued earlier the vendor-side actors are very keen on servicing the client and the popular saying 'the client is always right' depicts the relationship between client-side and vendor-side actors very well. By acting as intermediaries the boundary spanners fortify this "one way adaptation", in which the client-side actors can hand off collaborative actions to the boundary spanners as soon as it requires more of their attention than what is convenient. Thus, the client-side actors are not expected

to display collegiality by for instance helping the offshore vendor-side actors in developing knowledge and they are not expected to make themselves acquainted with the vendor's organization and how it functions.

Said differently, we have seen how the vendor-side boundary spanners have a unique position to help improve the collaboration. Because they are perceived as trustworthy by the client-side actors and possess the necessary capital in terms of especially relations and knowledge, they have the power to influence the relations between client-side actors and offshore vendor-side actors and to facilitate positive assessments of trustworthiness of the vendor and the vendor-side actors. However, because the two clusters of boundary spanners that are most exposed to client-side actors primarily act as intermediaries, this potential is left unrealized. Because the boundary spanners do not engage in facilitating such trust building the previously identified challenges with regards to transparency and knowledge are left unsolved. The gaps are not bridged: The problems are not solved. Rather, by acting as intermediaries the boundary spanners provide a temporary fix, not a sustainable solution – and the gaps between the client and the vendor remains, because the client-side are never prompted to assess the trustworthiness of the offshore vendor-side actors, who therefore are not perceived as trustworthy.

The Powerful Boundary Spanner

Langan-Fox & Cooper (2013) rightly conceive of boundary spanners as people, who “more than anything, [are] connected and networked across a wide range of people in departments and units” (p. 1). By the virtue of their connectedness boundary spanners become instrumental in developing collaboration across groups – in this case of offshore outsourcing, specifically between client-side actors located in Denmark and vendor-side actors located in India; and by the virtue of their connectedness “[i]nfluence and power accrues to the effective boundary spanner” (ibid.). I argue that a great deal of this influence and power stems from the trust vested in them. Because

they are perceived as trustworthy, the actors relying on the boundary spanners are able to have referral trust (Jøsang et al., 2006) in their counterparts. However, this requires that the boundary spanners are engaging as *connectors*, rather than as *intermediaries*. In cases where the boundary spanners are acting as intermediaries they are indeed also able to be effective as Langan-Fox & Cooper (2013) point out, however, it is a very short-term oriented effectiveness aimed at solving the immediate problems and challenges at hand.

On the contrary, when boundary spanners act as connectors they are able to facilitate long-term effectiveness, as they are weaving the two groups together and thus facilitating the *nexus effect* (Palus et al., 2013), where groups are dissolved and actors work together in a larger common whole. Arguably, this is exactly what happens when the managerial boundary spanners as well as the functional boundary spanners connect client-side actors with offshore vendor-side actors, as I have shown earlier in this chapter. When these two clusters of boundary spanners *connect* client-side actors with offshore vendor-side actors they facilitate positive assessments of the offshore vendor-side actors' trustworthiness by rendering these actors actions and contributions visible at an interpersonal level. By repeatedly connecting actors at an interpersonal level the client-side actors are exposed to an array of offshore vendor-side actors and gradually they are likely to start to assess the vendor-side collective as trustworthy. Indeed, boundary spanners have that power, but it requires that they are conscious about the importance of their boundary-spanning role, which is not always necessarily the case (Levina & Vaast, 2013). It also requires that they have the courage to render themselves redundant in the long run, because that is exactly what will happen when the two groups reach the nexus effect and work together as one common entity.

In the empirical case I am investigating this obviously constitutes a dilemma for one of the clusters of onsite boundary spanners, whose jobs are by and large justified by the lack of nexus effect and consequently being successful in connecting the two groups is

likely to have a negative impact on their careers: The Danish boundary spanners are likely to find themselves unemployed should they manage to succeed in connecting the two groups. Compared to having vendor-side actors working offshore, they are a heavy burden in terms of salary and, as a significant part of the business case in offshore outsourcing is customarily ascribed to the lower wages of a work force working out of Asia, there is indeed a risk that the vendor will have no incentive to keep them on-board, should their boundary-spanning roles become obsolete. But I have no reason to speculate that they are deliberately acting as boundary spanners in a sub-optimal way: Both the Danish boundary spanners and the onsite-deployed boundary spanners are repeatedly staged as important actors by the client-side actors as well as both managers and non-managers from the vendor organization and they are also repeatedly praised for the way they are doing their job. That is, they are rewarded for their roles as *intermediaries*, where they, on a daily basis, are easing the collaboration between the client-side actors and the offshore vendor-side actors – and there are no expectations stated that any of the two clusters of onsite boundary spanners act as connectors. Rather, the success criterion is that of an immediate instrumental one, where the boundary spanners fix concrete breaches in communication, coordination and knowledge with a short-term focus only. So, they are definitely doing their jobs – and they are doing so in a way that is perceived as successful.

While the short-term focus is not surprising – and completely in line with past research on globally distributed team work, for instance Cramton & Hinds (2005) who find that “[m]anagers of internationally distributed teams often are tempted to reduce interdependence between distributed groups as much as possible because of communication and coordination difficulties” (p. 258) – I do challenge whether the notion of success is reasonable seen from a financial as well as a collaborative perspective in the longer run. While boundary spanners are indeed powerful actors, their influence is not necessarily always positive and productive – in fact, boundary

spanning can have a counter-productive effect, where the power of the boundary spanners are – inadvertently – used to maintain and perhaps even fortify the very same boundaries that they are intended to bridge or at best break down. In such cases, the boundary spanners are in fact not boundary spanners, but rather powerful gatekeepers, who, given their trustworthiness surplus, are ascribed prerogative traits and considered indispensable.

Concluding Remarks

In this chapter I sat out to answer the research question: *What is the role of boundary spanners and how do these boundary spanners influence perceived trustworthiness of vendor-side actors and the vendor organization?* I have done so first by introducing a framework for understanding the role of trustworthiness in boundary spanning. By introducing trustworthiness in the boundary spanning leadership model devised by Palus et al. (2013), I have shown how obtaining the nexus effect requires that the boundary spanners themselves are perceived as trustworthy and subsequently that they are able to engage with the actors in *trust-preparatory boundary spanning activities at an interpersonal and at a collective level*. On the basis of this analytical framework I have shown how the clusters of boundary spanners to some extent do facilitate such trustworthiness, when they act as *connectors* between disparate groups. However, I have also shown how the boundary spanners, when acting as *intermediaries*, are in fact hindering such positive assessments of trustworthiness and thus blocking the way towards transforming the collaboration between two disparate groups into a state characterized by advanced interdependence, where the collaboration is reinvented and the two groups have transformed into a unity, and reached the nexus effect. Ironically, it seems that the actions of boundary spanners may in some cases be counter-productive even though it appears that they are successful, because their success is measured on a short-term scale instead of a long-term scale. In particular, this is the case for the two clusters of boundary spanners working onsite at the client's premises

in Copenhagen. These two clusters of boundary spanners are comprised of actors who are indeed trusted by the client-side actors and use the trust bestowed in them when acting as intermediaries. However, by doing so they may indeed be instrumental in making the collaboration as smooth and frictionless as possible, but they also do this at a cost: When acting as intermediaries they maintain the boundary between offshore vendor-side actors and client-side actors, whose perceptions of vendor-side trustworthiness is kept at low level. Boundary spanners can be conceived of as important organizational change agents in inter-organizational collaborations, but if the success is measured on how they contribute to solving concrete challenges, their actions are in fact in danger of being those of a gatekeeper, rather than those of a boundary spanner.

Indeed, a thorough analysis of boundary spanning activities entails a lot more than developing an understanding of the role of boundary spanners' in promoting trustworthiness. Another avenue of boundary spanning research in this concrete empirical setting could be to look at negotiations of power as Levina & Vaast (2008) do, when they theoretically engage with Bourdieu's practice theory. One could also apply a sensemaking approach as Corporaal et al. (2013) do, to further the understanding of the perception of boundaries and subgroup dynamics (Cramton & Hinds, 2005) in this case of offshore outsourcing collaboration; or devote attention to boundary spanners' role in promoting intergroup learning to further understanding of the conditions attached to knowledge sharing in globally distributed teams, which has received only limited scholarly attention (Cramton & Hinds, 2005). However, by introducing trustworthiness as a factor in boundary spanning I argue that we are able to obtain a more nuanced, fine-grained and comprehensive understanding of the role of the boundary spanner: We cannot merely introduce trust as an uncomplicated prerogative for boundary spanners. Rather, we must employ a more refined view on trust and trustworthiness and acknowledge that it is an ongoing process, which is

bound to influence any practice-oriented model for spanning boundaries. In this chapter I have taken outset the boundary spanning leadership model devised by in Palus et al. (2013) and shown how trust and trustworthiness has an impact throughout the boundary spanning process. By including development of perceived trustworthiness and ultimately trust as an integral part of boundary spanning activities this chapter contributes to boundary spanning theory by introducing *trust-preparatory boundary spanning activities* and the distinction between *connector* and *intermediate*, which signifies the importance of how boundary spanners go about their boundary spanning activities.

PART III

CHAPTER IX: THE PATCHWORK OF TRUSTWORTHINESS

Within organizational research trust is often considered as important, but yet something that is “just added”, much like salt. I started out this dissertation by staging trust as the secret ingredient of organizational life: Trust is not salt, but rather a complex, ambiguous ingredient – a masala – which should be granted attention, not least because it is in one way or another prerogative in most, if not all, forms of organizational collaboration.

From the trust literature we know that successful collaboration in globally distributed teams is dependent on trust, but we also know that establishing trust in such globally distributed teams is a difficult task, because of the inherent difficulty in establishing oneself as perceived trustworthy in a globally distributed context. Therefore, I sat out to answer the overall research question: “*How can vendor-side actors, as individuals and as a collective, be constructed as trustworthy collaborators in the eyes of the client-side actors?*”

The overall research question reflects my social constructivists stance: I am not asking *whether* the vendor-side actors are trustworthy or what *they themselves* can do to be perceived as trustworthy. Rather, I ask how they can be *constructed* as trustworthy, indicating the importance of the context in rendering someone or something trustworthy; and acknowledging that a variety of constructs influence perceptions of trustworthiness.

Throughout my ethnographic fieldwork four such constructs have emerged as significant moderators of perceived trustworthiness of the vendor-side actors at an individual and a collective level. It is these four constructs that I have analyzed in conjunction with the primary construct, trustworthiness, in each their chapter. In this

chapter I will first re-iterate the primary findings from the four analytical chapters. Subsequently, I will consider opportunities for advancing trustworthiness by re-introducing three of the prevailing ideas and management techniques on establishing trust, introduced in Chapter II: ‘Theory on Trust’.

Re-iterating the Analytical Results

In the first analytical chapter, Chapter V: ‘Challenged by Distance’, I have analyzed the perceived challenges of globally distributed collaboration and how distance influences the actors’ perceptions of their counterpart’s trustworthiness. The chapter argues that co-location facilitates positive assessments of trustworthiness, whereas geographical distance inhibits the same: When actors from the two organizations are working in a co-located manner they make positive assessments of their counterparts’ trustworthiness with regards to ability, integrity and benevolence. However, when they have not been exposed to working in a co-located manner the client-side actors refrain from assessing the abilities of the vendor-side actors at an individual level; they draw negative conclusions about the integrity of the vendor-side actors; and they refrain from assessing benevolence, which leads to the negative conclusion that the vendor-side actors not benevolent. I have argued that the difference in perceived trustworthiness is related to three main challenges associated with working geographically dispersed: The *reluctance to engage directly* with each other across geographical distance; perceived *lack of knowledge* among the offshore vendor-side actors; and *lack of transparency*. This lack of transparency has an organizational connotation and an interpersonal connotation and I have argued that the collaboration practice, where status and progress on tasks is communicated via a standard IT-system, leaves only little room to convey contextual information and skews information towards reporting results and thus leaves out important information on *how* these results have been (or have not been) reached. This stands in stark contrast to co-located work, where passive face time (Elsbach et al., 2010) plays an important role in

conveying contextual information. In a nutshell, the argument I produce is this: When actors are confined to dealing with each other by the means of highly abstract reporting regimes, they loose touch with the complexities of handling the actual task that their counterparts' face; and thus they are inclined to produce negative perceptions of trustworthiness, insofar goals are not met as expected, regardless of whatever reason there may be to this lack of goal adherence, as such reasons are never conveyed.

The role of IT systems in informing about task status and progress is further explored in Chapter VI: 'Flipping the Switch on Trust and Control', where the primary aim has been to understand how control mechanisms are used in the collaboration between client and vendor; and how the use of control mechanisms affect client-side perceptions of the trustworthiness of vendor-side actors. Specifically, based on an analytical framework I have devised drawing on inspiration of the works of Das & Teng's (1998) and Weibel's (2007) I analyze *what* is being controlled (namely output, process and workplace behavior); *how* such control is performed (via standard specifications monitoring, evaluation and feedback; and rewards and sanctions); and finally how the various forms of control that are instigated influence perceived trustworthiness.

With regards to output control, I have shown how the contractually specified service level agreements (SLA) impose significant output control, where the aforementioned IT systems are the most predominant manifestations of the SLA's in the daily collaboration. With regards to process control I have shown how the adherence to the ITIL framework, a standardized ISO certified 'best practice' framework for IT operations used worldwide in a magnitude of different industries and types of organizations to ensure common practice, impose standardized ways of handling a variety of processes related to IT operations. In the empirical context I have been investigating the most important one's are the change management process and the

incident management process, as these two standard specifications are the one's the client-side actors are most exposed to.

By and large it is primarily the offshore vendor-side actors, who are exposed to output and process control, whereas the onsite vendor-side actors workplace behavior is controlled by the means of normative control. With regards to normative control I have shown that this is primarily exercised on the vendor-side actors who are working onsite. I have argued that informality; collaboration; and taking responsibility are the standard specifications of workplace behavior, which is evaluated by the means of co-location itself; and that these evaluations are predominantly positive. That is, by the means of normative control the onsite vendor-side actors are conceived of as valuable collaborators; and they are rewarded by continuous praise by the client-side actors.

This stands in contrast to the offshore vendor-side actors, who are rarely subjected to normative control as collaboration across geographical distance is kept at an absolute minimum. In this scenario the actors engage in *the least collaborative effort* (Clark & Brannen, 1991), characterized by the absence of social interaction beyond common courtesies and straight-to-the-point communication on the rare occasions that they have phone meetings. The remainder of the time, with the notable exception of client-side visits to the OMC in India, the collaboration is by and large characterized by formally agreed upon interactions – that is, output and process control.

Based on the analysis of the use of control I turn focus to how the use of these control mechanisms influence perceptions of trustworthiness. The main findings are that control can be a substitute for trust, an inhibitor to trust and a trust catalyst. The first finding – that control can substitute trust – is by no means controversial. It is well described within the control literature and thus not surprising. The second finding – that control can be an inhibitor to trust – has also been under scrutiny by control researchers. However, it is worthwhile noticing that while the output controls can be substitutes for trust, they can at the same time inhibit trust, because the focus of output

control is on contract adherence, which stands in contrast to the values that the client-side actors perceive as central. That is, output control effectively hinders the offshore vendor-side actors to show *responsibility* and *collaborative efforts* as the output control rigidly summarizes their effort into measurements that render the individual contribution by offshore vendor-side actors invisible.

Finally, my analysis shows that control can in fact be a catalyst for trust, which only to a very limited extend has been covered by prior scholarly efforts. Most scholarly work on the relationship between trust and control argue in line with Das & Teng (1998) that “control mechanisms will undermine the level of trust among partners” (p. 501). In contrast to conventional wisdom my analysis shows that insofar adherence to standard specifications is evaluated positively, control can lead to trust. Specifically, output control and process control leads to positive assessments of trustworthiness of the offshore vendor-side actors as *collectives*, when the applied control mechanisms show that standard specifications are met. Additionally, normative control leads to positive assessments of trustworthiness of the onsite vendor-side actors because the co-location enables monitoring of vendor-side actors’ adherence to standard specifications of workplace behavior; and via such monitoring the client-side actors acknowledge that the onsite vendor-side actors as *individuals* adhere to the same values and work in a way that is similar to that of the client-side actors themselves. Thus, the chapter contributes with an analysis that suggests that intelligently applied control can in fact be conducive to perceptions of trustworthiness and development of trust.

In Chapter VII ‘Trusting Across Cultures’ I investigate the role of culture in the offshore outsourcing collaboration between the client and the vendor. I do so by adopting an interpretivists perspective, and thus reject that we can look at dichotomies such as India/Denmark or client/vendor as *a priori* constructs. Rather, to understand if and how culture plays a role in the collaboration we must follow how culture unfolds in practice and construct an *a posteriori* understanding of culture and cultural

differences by following how the actors make sense of each other, and how they establish boundaries and construct in-groups and out-groups. By investigating how cultural boundaries are enacted in practice the purpose of the chapter has been to answer the research question: *How is vendor-side actors' trustworthiness affected by enactments of cultural boundaries?*

By following the actor-level constructions of groups I have identified four significant groupings: One based on national stereotyping done by the client-side actors; one based on organizational affinity; one based geographical location; and one grouping that includes all actors. Additionally, I have argued that *boundary objects* (Barrett & Oborn, 2010) – that is, the IT systems that I have analyzed as output control in Chapter VI – are in fact fortifying cultural boundaries. The argument expands on the reasoning laid forth in Chapter VI, where I found that output control was inhibiting positive assessments of trustworthiness and argues that boundary objects inhibits positive assessments of trustworthiness across organizational boundaries. Conversely, I have found that presentational rituals (Kunda, 1992) are breaking down the same boundaries. Specifically, when the client-side actors in general, and the client-side CIO in particular, engage in presentational rituals during visits to the OMC they are in fact constructing *one common* culture, characterized by a 'we are in it together' discourse. However, given the rarity of the visits to the OMC and the fact that this discourse is abandoned as soon as the client-side actors return to Denmark, where they again engage in stereotyping national differences, the presentational rituals have a limited and temporary effect.

By following actor-level constructions of group dichotomies I have shown that there is a fourth antecedent to trust at play in this context of offshore outsourcing collaboration, namely *proactiveness* as a significant part of being perceived as trustworthy has to do with displaying such proactiveness. In the offshore outsourcing collaboration that constitute the empirical foundation for this dissertation, the client-side actors attribute

the perceived lack of proactiveness to national characteristics of ‘the Indians’, who are perceived as more hierarchically oriented and collectivistic. On the basis of this stereotypical judgment the client-side actors reason that ‘the Indians’ do not feel the same personal responsibility towards their work as they do themselves. Consequently, the vendor-side actors are perceived as order-following to a degree where they have little interest in doing what is best, but, on the contrary, are preoccupied with doing as told. In other words, ‘the Indians’ are conceived of as re-active employees that need to be micro-managed.

However, by drawing on findings from the two preceding analytical chapters, I have argued that the perception of the offshore vendor-side actors as re-active may be justified, but that *the client-side reasoning is misleading*. That is, ‘features’ tied to their national-cultural heritage provide only a shallow, ‘easy and convenient’ explanation; and in this chapter I offer another – and more nuanced – explanation as to why the offshore vendor-side actors may come across as lacking proactiveness, which signifies the importance of the context in which the collaboration happens: First, this explanation draws on the challenges of distributed collaboration, where the actors are experiencing lack of knowledge and transparency and find interacting directly with the offshore vendor-side actors difficult. Interestingly, the onsite vendor-side actors working in close proximity with the client-side actors break free of the stereotyping: They are no longer perceived as ‘re-active Indians’, but as individuals who are repeatedly praised for their abilities and their good work. However, the fact that the client-side actors do not perceive the Indians working onsite as re-active, does not seem to prompt them to change their perceptions of Indians in general and consider that the perceived lack of proactiveness may be a result of something other than national-cultural features.

Second, the contextualized explanation also draws on the power distribution between the client-side actors and the vendor-side actors, characterized by a “the client is

always right” thinking, where I have shown how the client-vendor relationship is constructed as a relationship where the vendor-side actors are expected to service the client; to understand; and to adapt to the client’s way of working. Third, one could argue that this power distribution should lead to a situation where the vendor-side actors *en bloc* adapt to the client’s demand for proactiveness. However, I have shown that the scarce use of presentational rituals provides ample reasons why this is not so: Such presentational rituals are detached from the daily work and only performed twice per year, when the client-side actors visit the OMC. Thus, they are indeed *rituals* rather than an embedded part of everyday practice and they forfeit their purpose of establishing unity and empowering the offshore vendor-side actors to engage proactively. The fourth, and final, part of the explanations draws on my analysis of boundary objects, where I show that the use of boundary objects, such as the incident management IT system, instigated as coordination mechanisms aimed at easing coordination across distance are imposing a “management by numbers” regime, where the work performed by actors who are not co-located with the client-side actors is rendered invisible and where all incentives are aimed at meeting SLA requirements, not at enabling proactive behavior. The chapter concludes that in this context boundary objects are in fact counterproductive to staging the vendor-side actors as trustworthy, as they impede proactiveness. Rather, they are *culturizing* the collaboration by building walls around cultural groups and reinforcing the same.

In Chapter VIII: ‘Spanning the Trustworthiness Boundary’ I have shed light on the boundary spanners influence on perceived trustworthiness by posing the research question: *What is the role of boundary spanners and how do these boundary spanners influence perceived trustworthiness of vendor-side actors and the vendor organization?* I do so by introducing a framework for understanding boundary spanners’ role in furthering perceived trustworthiness, theoretically underpinned by my scholarly understanding of trust and trustworthiness laid forth in Chapter II and by recent work on boundary spanning by Levina & Vaast (2008; 2013) and Palus et al.

(2013). On the basis of this analytical framework I also introduce two types of boundary spanners, namely *intermediaries* and *connectors*, where the first stands between two groups and acts as a translator, whereas the latter connects members of the two groups and supports actors from the two groups in interacting directly with each other.

The analytical results of this chapter show how the clusters of boundary spanners facilitate positive assessments of trustworthiness, when they act as *connectors* between disparate groups. However, the analysis also shows how the boundary spanners, when acting as *intermediaries*, are in fact hindering such positive assessments of trustworthiness, which inhibits the actors from reaching what Palus et al. (2013) call *the nexus effect*, where the two groups have transformed into a unity and the collaboration is characterized by a high degree of interdependence. Thus, while the vast majority of boundary spanning efforts can be characterized as that of an intermediary these efforts, I have argued that in some cases they are counterproductive even though it appears that they are successful; because their success is measured on a short-term scale instead of a long-term scale.

This is in particular the case for the boundary spanners working onsite at the client's premises in Copenhagen. The client-side actors conceive of these boundary spanners as highly trustworthy collaborators and they are considered instrumental in making the collaboration as smooth and frictionless as possible. However, by acting as intermediaries they maintain the boundary between offshore vendor-side actors and client-side actors, whose perceptions of vendor-side trustworthiness is kept at low level.

I end the chapter by concluding that while the intermediary role of the boundary spanner may be effective in the short run the consequence is that the collaboration will increasingly be relying on the boundary spanner, who becomes a bottleneck and a gatekeeper. In order to break down boundaries and cater for long-term efficiency in the

collaboration, the boundary spanners should act as *connectors*, which ultimately mean rendering themselves unnecessary, when the nexus effect has been reached.

Opportunities for Advancing Trustworthiness

The findings from the four analytical chapters, re-iterated above, inform the overall research question, which reads: “*How can vendor-side actors, as individuals and as a collective, be constructed as trustworthy collaborators in the eyes of the client-side actors?*” In the remainder of this chapter I suggest three trustworthiness-increasing initiatives informed by the analytical results in conjunction with three of the prevailing ideas and management techniques on managing trust outlined in Chapter II: ‘Theory on Trust’. These are: psychological safety, social interaction and task interdependence.

Psychological Safety in a Broader Perspective

From the trust literature we know that a work environment characterized by a high degree of perceived psychological safety among the actor is conducive to development of trust. Because trust is inevitably connected to perceptions of risk, lowering risk makes trusting easier. That is, it is more likely that someone is willing to trust me to pay back 10 USD I have lend, than 10.000 USD, simply because the risk is lower. Thus, if the work environment is perceived as a psychologically safe environment where actors “believe they can participate openly and actively without fear of suffering adverse personal consequences, such as being derogated for their ideas and observations or for the manner by which they express them” (Schaubroeck et al., 2011: 864) it is conducive for developing trust.

In Chapter VIII: ‘Spanning the Trustworthiness Boundary’ I have argued that within their own group the client-side actors do indeed have a psychological safe work environment. Unlike many other outsourcing endeavors, where a certain percentage of the total workforce is outsourced and the remaining employees live with a constant anxiety of being ‘next in line’ in terms of being laid off and substituted by less salary-heavy resources offshore, this specific outsourcing engagement outsourced *all* IT and

had only one IT-employee remaining, who was given the tasks of building a new client-side IT organization capable of managing the outsourced IT activities. Thus, all current client-side actors have been hired to do exactly what they are doing; and their manager, the client-side CIO, repeatedly acknowledges their contribution as a vital part of making the offshore outsourcing engagement a success. However, the historical background of this offshore outsourcing collaboration is indeed a special case. Thus, in a broader perspective of offshore outsourcing, where many employees in companies that are outsourcing IT activities are indeed in a risk of being replaced by less salary-heavy IT professionals in countries such as India, Philippines, Brazil or Eastern Europe, the psychological safety of the employees is indeed not a trivial matter, but can be expected to be a significant barrier to collaboration effectiveness.

Furthermore, the notion of psychological safety is not only relevant to client-side actors. On the contrary, I argue that perceptions of psychological safety are equally important to the vendor-side actors. In this particular case of offshore outsourcing collaboration, where taking responsibility by being proactive are conceived of as central aspects of what constitute 'good' workplace behavior in the eyes of the client-side actors, psychological safety among the vendor-side actors is in fact instrumental: Acting proactively as opposed to simply following orders arguably requires courage and willingness to fail. As failure is inherently associated with risk, proactiveness requires a platform of psychological safety that eliminates or at least diminishes perceived negative consequences of failure. Put differently, if the perceived risk of failing is reduced, the likelihood that vendor-side actors are willing to take a *leap of faith* (Möllering, 2006) and act in a proactive manner is increased. *Thus, insofar the construction of vendor-side actors as trustworthy collaborators requires that they display proactiveness; a psychological safe vendor-side environment is necessary.*

Social Interaction

The importance of social interaction for building trust is repeatedly mentioned within the trust literature; and we know that professional relationships where the involved actors invest time in getting to know each other on a personal level are typically characterized by being more trusting than professional relationships where actors only engage with each other on a strictly professional level. This is also reflected in the empirical settings I have been researching where the client-side actors exhibit significantly more trust in the vendor-side actors they have had the opportunity to engage with on a more social level, than the one's where they have not. Thus, *to construct the vendor-side actors as trustworthy collaborators in the eyes of the client-side actors increasing social interaction is a viable strategy* because “social networks clearly matter for trust as trustors and trustees are embedded in relationships with each other”, which Möllering (2006: 196) reminds us of.

As it seems that social interaction happens automatically, without the need for deliberate nudging when actors are co-located, the quick fix solution would obviously be to simply increase co-location by for instance deploying more vendor-side actors onsite and more frequent and longer client-side visits to the OMC. However, such a solution would obviously also affect the business case negatively. But I argue that there is ample opportunity to facilitate more social interaction, and hereby paving the way for more trust between actors, without necessarily increasing co-location, even though Berry (2013) assesses that creating trust “may be the greatest challenge in building successful virtual teams” (p. 10).

First, using technology to deliberately imitate co-located work practices, for instance by greeting each other good morning and goodbye via instant messenger every day; and by developing a practice where types of communication that the actors would deal with face-to-face if they were co-located is never conveyed via email, but instead via richer ICT, such as videoconferencing, webcam chat or phone, is arguably conducive

for developing social relations, because it would legitimize interaction across distance that does not have a strictly professional purpose. In Chapter V: ‘Challenged by Distance’ I have suggested more radical initiatives, such as leaving webcams and sound on for a longer period of time without necessarily having to speak to each other all the time; or booking calendar time, where it is agreed that remote colleagues have first priority and can make contact at any point in time and hereby signaling availability and interest. Other initiatives could be to arrange cross-locational gaming or arrange virtual coffee meetings. I argue that it is of less importance what is being done to imitate co-location. Rather, what is important, is that communication and collaboration via ICT is infused with social interaction and not merely used in a straight-to-the-point manner, the leaves no room for the actors to socialize.

Secondly, I argue that a deliberate use of boundary spanners as *connectors* would also be conducive for social interaction; insofar these boundary spanners are tasked with connecting client-side actors with offshore vendor-side on more than just a professional level. As I have discussed in Chapter VIII: ‘Spanning the Trustworthiness Boundary’ it is striking how little the client-side actors know about the “do-good” activities that the vendor organization is engaged in. While the boundary spanners themselves are good at interacting socially with everybody – arguably, one of the traits that makes them boundary spanners – their boundary spanning activities is almost exclusively focused on professional topics. However, I argue that their knowledge about both organizations, about cultural characteristics of the different groups and about the individual actors is an important potential, which is yet to be realized. As we know from Sackmann et al. (2011): “When people with different cultural backgrounds meet, a natural behavior is to stick with people from the same group” (p. 149) and I argue that the boundary spanners have a unique position, given their relative surplus of social capital, to pull actors from the different groups together and pave the way for increased social interaction, insofar social and cultural integration is put on the agenda

and they deliberately expand their boundary spanning activities to include connecting actors at an interpersonal level, too. Arguably, social interaction can also be obtained by deliberately designing work processes that facilitate social interaction, which I will attend to below.

However, there is another connotation to social interaction, namely that it enables normative control. Indeed, the more social interaction the better the possibility to conduct normative control. Arguably, the two cannot be separated. Thus, catering for social interaction is not just conducive to trust development in itself, but also because it increases the possibility to monitor adherence to standard specification of workplace behavior, which, as argued in Chapter VI: 'Flipping the Switch on Trust and Control', is a catalyst to trust.

Task Interdependence

From Schaubroeck et al. (2011) we know that working towards a common and well-defined goal is conducive for development of trust; and Chung & Jackson (2011) report that task interdependence has a positive impact on actors' attitudes towards each other. That is, the more interdependent teams work, the higher the probability of developing trust among the team members. This resonates well with the analytical findings in this dissertation, where the client-side actors perceive vendor-side actors working close together them as more trustworthy than vendor-side actors with whom they have less frequent interactions. While physical proximity is undoubtedly an important factor I argue that this is not the only factor that explains the difference in perceived trustworthiness as those offshore vendor-side actors with whom the client-side actors are closely tied to in terms of collaboration are perceived as trustworthy too; The reciprocal interdependence (Chung & Jackson, 2011), which characterizes these collaborations are arguably also an important factor. That is, because the actors are mutually dependent on each other's contributions they are more likely to assess each other as trustworthy.

Throughout the analytical chapters I have introduced a number of factors that supports this claim: First, in Chapter VII: 'Trusting Across Cultures' I have shown that the use of boundary objects are reinforcing socially constructed groups and hereby strengthening us-and-them dichotomies. As these boundary objects by decomposing tasks are creating a highly abstract view of the efforts put into a given tasks, they are culturizing the collaboration and works *against* unity and task interdependence, which results in a fragmented understanding of *the others'* contributions. Interestingly, boundary objects have a much less prominent role when actors from the two organizations have frequent interaction and reciprocal interdependence. Secondly, as addressed in Chapter VI: 'Flipping the Switch on Trust and Control', control can be a catalyst for trust; and arguably reciprocal interdependence, characterized by cyclical communication about a task is a strong form of control as it enables actors to gain insights in not only the quality and timeliness of the end delivery, but also throughout the process. This way the actors are continuously able to assess each other's abilities and integrity.

Thus, *high degrees of task interdependence can facilitate construction of the vendor-side actors as trustworthy collaborators*. However, while a high degree of task interdependence is conducive for trust development it arguably also requires trust to be prepared to accept the inherent risk associated with high task interdependence. Therefore I believe that applying a *principle of gradualness* is important. One may speculate that engaging in unwarranted high task interdependence may have detrimental influence on the perceived psychological safety; and as lack of psychological safety is counterproductive to trust development, gradual increase in the importance of tasks subjected to reciprocal task interdependence is advisable.

CHAPTER X: CONCLUSION & FUTURE WORK

Conclusion

“Trust is pivotal in a global virtual team to reduce the high levels of uncertainty endemic to the global and technologically based environment.”
(Jarvenpaa & Leidner, 1999: 792)

In an ever more globalized world we are faced with the challenges of collaborating across geographical distance. One of the many manifestations of globalization is the increasing tendency for western firms to strategically outsource activities to Asia (Windrum et al., 2009) and throughout the last two decades it has become increasingly popular to engage in offshore outsourcing of IT activities (Contractor et al., 2010). Success in such endeavors depends significantly on the participants’ abilities to work in distributed teams; and developing trust between organizations and geographically dispersed actors is, in the words of Jarvenpaa & Leidner (1999), pivotal. However, the management literature has devoted little attention to trust (Nienaber et al., 2014).

Throughout this dissertation I have put trust and trustworthiness center stage in my ethnographic study of an offshore outsourcing collaboration between the client, a leading Danish media company, and the vendor, one of the largest Indian IT service providers; which was embarked upon in 2012 and includes all of the client’s IT-operations. From the body of literature on trust we know that development of trust is dependent on positive assessments of trustworthiness. Therefore, the main objective of this dissertation has been to develop an understanding of how vendor-side actors – as individuals as well as a collective – are rendered and rendering themselves trustworthy in the eyes of the client-side actors. Thus, I have applied a selective focus, since it is primarily vendor-side trustworthiness in the eyes of the client-side actors that is being investigated. I have done this for two reasons: First, because the nature of such an offshore outsourcing collaboration presents unique challenges to the client-side with

regards to financial and operational risks: While any offshore outsourcing contract has built-in incentives aimed at animating the vendor to provide services according to agreement, ultimately the client bears the bigger risk – it is their business and financial penalties are never adequately compensating for loss of revenue. Consequently, in order to engage in offshore outsourcing the client must have confidence that the vendor is able to fulfill contractually agreed obligations. That is, they must trust the vendor. Secondly, my ethnographic studies have provided much more empirical material to substantiate this client-side focus than had I chosen a vendor-side perspective.

On the basis of this selective focus I have posed the following main research question:

How can vendor-side actors, as individuals and as a collective, be constructed as trustworthy collaborators in the eyes of the client-side actors?

I have engaged with the overall research question by applying an interdisciplinary perspective, where trust and trustworthiness are not isolated theoretical constructs, but rather dynamic constructs that influence and are influenced by other constructs. Through my ethnographic fieldwork four such constructs have emerged as significant moderators of perceived trustworthiness of the vendor-side actors at an individual and a collective level: Distance, Control, Culture and Boundary Spanning. These four constructs have been analyzed in conjunction with the primary construct, trustworthiness, in each their chapter. Together with the opportunities for advancing trustworthiness discussed in Chapter IX: ‘The Patchwork of Trustworthiness’, they inform the answer to the overall research question.

In conclusion, vendor-side actors are constructed as trustworthy collaborators at an individual level, when they are working in geographical proximity with their client-side counterparts. In contrast, when vendor-side actors have not been exposed to working in a co-located manner with their client-side counterparts they are perceived

as less trustworthy. This perception is related to three main challenges associated with working geographically dispersed: The *reluctance to engage directly* with each other across geographical distance; perceived *lack of knowledge* among the offshore vendor-side actors; and *lack of transparency*. These three challenges are fortified by the use of formal control of offshore vendor-side actors, as these controls are boundary objects that provide highly abstract and un-contextualized information and thus render individual efforts invisible; glorify adherence to standard specifications and thus inhibit proactiveness, which is a central value to the client-side actors; and invoke minimal interaction and thus fuel us-and-them dichotomies as well as cultural stereotyping. In other words – and in line with conventional wisdom – at an *individual level* formal control is predominantly an inhibitor to trust development in the offshore outsourcing engagement that constitutes the empirical foundation for this dissertation, as such control effectively hinders the offshore vendor-side actors to show *responsibility* and *collaborative efforts*.

However, I have also argued that there are instances where formal control is conducive to trust – where formal control is a trust catalyst – which suggests that process and output control is not always bad in terms of trust development. In fact, at a *collective level* output control can be conducive to trust, when expectations are met. What is important in terms of trust development is that the formal control mechanisms that are implemented render trustworthiness visible instead on invisible. That is, formal control should also provide transparency into *how* work is being done, rather than just focus on *what* is being done. As discussed in Chapter IX: ‘The Patchwork of Trustworthiness’ a higher degree of task interdependence is a promising avenue for developing trust, because it enables the client-side actors to rely less on un-contextualized information provided by the means of boundary objects; and to rely more on the contextualized control that reciprocal task interdependence introduces. Thus, we can conclude to things: First, *vendor-side collectives are constructed as trustworthy collaborators by the means of output control, insofar expected performance goals are met*. Secondly,

with regards to trustworthiness at an individual level we can conclude that *contextualized and continuous output and process control can construct the vendor-side actors as trustworthy collaborators.*

In contrast to the formal control that offshore vendor-side actors are subjected to, the onsite vendor-side actors are primarily subjected to normative control. By the means of normative control these actors are assessed as trustworthy, as they adhere to the standard specification of workplace behavior, namely informality; collaboration; and taking responsibility. Furthermore, the normative control is conducive to breaking down us-and-them dichotomies and the onsite vendor-side actors are not subjected to cultural stereotyping, but rather acknowledged as individuals. Thus, *by subjecting vendor-side actors to normative control, they are constructed as trustworthy collaborators in the eyes of the client-side actors.*

With regards to culture I have shown how the offshore vendor-side actors are subjected to national stereotypes. They are conceived of as more hierarchical and as collectivists, who are incapable of displaying proactiveness and have to be micro-managed. However, my analysis also shows that when vendor-side actors are working onsite or have significant direct interactions due to their job functions they are in many cases not subjected to the same stereotyping by the client-side actors. They are no longer perceived as ‘re-active Indians’, but as individuals who are repeatedly praised for their abilities and their good work. Furthermore, I have shown how the contextualization that happens when client-side actors visit the OMC is beneficial to establishing a more nuanced picture of the client-side actors’ offshore collaborators that is less prone to cultural stereotypes. In conclusion, *when cultural stereotypes are disbanded and the vendor-side actors are acknowledged as individuals they are constructed as trustworthy collaborators in the eyes of the client-side actors.*

In the fourth and final analytical chapter I have put the role of boundary spanners under scrutiny; and I have argued that two modes of boundary spanning are enacted – that of

an intermediary and that of a connector. The vast majority of boundary spanning efforts can be characterized as that of an intermediary, which is counterproductive to developing trust in the vendor-side actors, despite appearing successful in a short-term perspective. Conversely, the analytical findings suggest that when the boundary spanners act as connectors they are in fact facilitating positive assessments of trustworthiness. Thus, *when boundary spanners act as connectors the vendor-side actors are constructed as trustworthy collaborators in the eyes of the client-side actors.*

Implications & Future Work

In each of the four analytical chapters I have suggested implications for practice as well as implications for theory. Furthermore, in Chapter IX: ‘The Patchwork of Trustworthiness’ I have attended to a number of opportunities for advancing trustworthiness in practice fuelled by the body of literature on trust and contextualized with my analytical findings. In this section I will briefly recap these implications. First I will re-iterate the practical implications. Subsequently I will re-iterate the theoretical implications presented in the analytical chapters as well as more general implications for theory provided by the dissertation as a whole.

Implications for Practice

In Chapter V: ‘Challenged by Distance’ I have argued that in order to advance positive assessments of trustworthiness in an offshore outsourcing collaboration characterized by geographical dispersion actors cannot depend on contextual confidence (Child & Möllering, 2003), as this is weak. In co-located teams, contextual information passed on via the physical proximity itself, can lead contextual confidence following a principle of gradualness, as the actors gradually and continuously gather contextual information about each other and hereby pave the way for developing trust. Thus, in co-located teams the risky business of trusting is gradually expanded in a speed that is proportional with the gathering of contextual confidence. The same principle of

gradualness cannot readily be applied in geographically distributed teams. In such distributed teams contextual information is only scarcely available as the actors are not absorbing information about each other continuously, but only when they – more or less often – actively interact with the virtual counterpart. Therefore, in order to develop a foundation for trust actors need to actively engage in trust building by applying active trust (Child & Möllering, 2003). However, active trust development in geographically dispersed requires that technology is readily available and used; and that they actively seek to compensate for the lack of contextual information by *imitating* the form of dialogue that occurs when they are co-located and hereby increase passive face time (Elsbach et al., 2010) in the virtual office space.

In Chapter VI: ‘Flipping the Switch on Trust and Control’ I propose that control can in fact be a catalyst to trust, despite conventional wisdom claiming the opposite. Therefore I suggest that intelligently applied control can be a good strategy for establishing trustworthiness. By *intelligent* I signify that control can indeed become an inhibitor to trust if one is not carefully designing the control mechanisms that are put into use. In the specific empirical setting I have been investigating, where responsibility and collaborative efforts are central values in the eyes of the client-side actors, I suggest that formal control mechanisms that render vendor-side adherence to these values visible can have a positive influence on the perception of vendor-side trustworthiness. Furthermore, I suggest that normative control also has a positive impact on perceived trustworthiness, which can be catered for by increasing social interaction between actors that are not physically co-located.

In Chapter VII: ‘Trusting Across Cultures’ I suggest that insofar the client-side actors disband national stereotyping, by breaking out of the iron cage that Hofstede puts around culture and understand culture as dynamic construct where human agency plays a vital role, positive assessments of trustworthiness would have substantially better conditions to emerge. Rather than making sense of perceived re-active behavior as

something related to national culture, I encourage that the client-side actors acknowledge that the context has a significant impact on the vendor-side actors' ability to be proactive. Specifically, I point towards the perceived challenges of collaboration in geographically dispersed teams; the way the roles of 'the client' and 'the vendor' is negotiated, which is characterized by a 'the client is always right' discourse; the limited use of presentational rituals aimed at establishing unity; and finally how boundary objects are counter-productive to proactiveness, as contextual factors that inhibit proactiveness.

In Chapter VIII: 'Spanning the Trustworthiness Boundary' I argue that despite their best intention the boundary spanners are in fact maintaining status quo and in some cases even fortifying the boundaries, rather than contributing to dissolving them; and I suggest that revising the role of the boundary spanner and instigating a long-term perspective in which boundary spanning activities are aimed at *connecting* members of disparate groups, rather than merely acting as an *intermediary* between them, would be conducive to positive assessments of trustworthiness.

Finally, in Chapter IX: 'The Patchwork of Trustworthiness' I suggest three managerial efforts that are likely to increase the perceived trustworthiness of the vendor-side actors, namely catering for a psychologically safe work environment that enables the vendor-side actors to take a leap of faith and be proactive; increasing social interaction; and advancing task interdependence.

Implications for Theory

This dissertation contributes to the trust literature and the literature on global work with an in-depth empirical study. As Möllering (2006) points to trust is a unique and powerful concept but little effort has been put on "reconnect[ing] our sophisticated ideas about trust to bigger research agendas in the social sciences" (p. 193). In line with Möllering (2006) I argue that "the question of how actors can form positive expectations of others is among the most basic questions that can be asked in the social

sciences” (p. 194) and this dissertation’s primary aim has been to address this basic question in the specific context of offshore outsourcing. By doing so, I contribute to the trust research community, which in general is oriented towards quantitative research and lab experiments, with an ethnographic study that offers an in-depth analysis of a concrete empirical context. Additionally, only a very limited focus within trust research has been aimed at understanding trust in a global, distributed context and it has been the ambition of this dissertation to add to that body of knowledge, too. Furthermore, it has been the goal of this dissertation to engage in interdisciplinary research, where trust is not researched as an isolated construct, but rather as a part of a dynamic and complex empirical context; and thus to connect to other research agendas within the field of social science.

In a similar vein, Hinds et al. (2011) point out “that global work has become increasingly widespread in the last two decades” (p. 138). However, they also find that “global work, although a pervasive phenomenon, has been under-examined in the management literature” (ibid.) and “few empirical studies of global work have actually been published in the management literature” (ibid.). Thus, it has also been the ambition of this dissertation to contribute to management literature with a longitudinal empirical study of global work.

In addition to contributing to the trust research community and the literature on global teams with an ethnographic and interdisciplinary analysis of offshore outsourcing where trust and trustworthiness are analyzed in conjunction with other constructs – distance, control, culture and boundary spanning – the dissertation also suggests a number of concrete theoretical contributions, which I will attend to below.

The analysis provided in Chapter VI: ‘Flipping the Switch on Trust and Control’ suggests an implication to theory related to the relation between trust and control. My findings suggest that control can be a substitute to trust, an inhibitor to trust and a trust catalyst. While the first two are well described in earlier scholarly work, the last

finding – that control can be a trust catalyst – has only received very little attention. Most scholarly efforts on the relationship between trust and control argue that control undermines trust; and thus my finding that insofar adherence to standard specifications is evaluated positively control can lead to trust suggests that we may need to rethink the relationship between the two constructs. Thus, I argue that we should abandon the belief that control is detrimental to trust and signals lack of trust. Rather than seeing control as a sign of lack of trust, we should consider control as a potential to establish trust. Control provides *transparency* and thus the right form of control is conducive to assessing others' trustworthiness, which, if evaluated positively, leads to trust – and therefore control can be a trust catalyst.

In Chapter VII: 'Trusting Across Cultures' the concept of presentational rituals (Kunda, 1992) is one of the theoretical constructs I use to make sense of enactments of culture in the empirical settings. I believe that the notion of 'presentational rituals' is a powerful construct with significant explanatory power. However, in Kunda's (1992) original work there are three types of presentational rituals, but non of them can account for presentational rituals, where subordinates are put in the driver's seat as they are *talking up*. Arguably, this notion of talking up is a significant construct in organizations, such as the client-side organization in my empirical context, where proactive subordinate behavior is considered valuable. As this notion of proactive behavior has become quite common in today's organizations I argue that the *talking up* presentational ritual is a significant addition to Kunda's three types, as this allows for a more elaborate understanding of how employee agency is manifested in modern organizations. Thus, Chapter VII contributes to theory by introducing a fourth type of presentational ritual, namely *talking up*.

The analysis of boundary spanning and trustworthiness in Chapter VIII introduces two theoretical contributions. First, I argue that we are able to obtain a more nuanced, fine-grained and comprehensive understanding of the role of the boundary spanner by

recognizing that trust is an important construct, as it is bound to influence any practice-oriented model for spanning boundaries. Therefore, I suggest that we introduce trust and trustworthiness as an integrated part of boundary spanning. Specifically, I take outset in the boundary spanning leadership model devised by in Palus et al. (2013) and show how trust and trustworthiness have an impact throughout the boundary spanning process. Thus, by including development of perceived trustworthiness and ultimately trust as an integral part of boundary spanning activities this chapter contributes to boundary spanning theory by introducing *trust-preparatory boundary spanning activities* as an integrated part of Palus et al.'s (2013) process model for boundary spanning leadership.

Secondly, I introduce a distinction between acting as a *connector* and acting as an *intermediate*, which signifies the importance of how boundary spanners go about their boundary spanning activities. I conceptualize the *intermediary* as someone whose success has an immediate, practical and instrumental connotation. That is, the *intermediary* is making effective collaboration possible as fast as possible. In contrast, when a boundary spanner acts as a *connector* he is supporting actors from the two groups in interacting directly with each other, instead of being a layer between them. Furthermore, I have shown that a boundary spanner acting as an *intermediary* may in the short run facilitate effective collaboration, but in the long run the *intermediary* is in fact maintaining status quo; and in some cases even fortifying they very same boundaries that he is engaged in bridging. Instead of spanning or dissolving boundaries the *intermediary* becomes a gatekeeper. In contrast, by acting as a *connector* the boundary spanner will improve actors' ability to collaborate and ultimately render himself unnecessary.

Future Work

Indeed, instances of global work have increased significantly over the last two decades, as Hinds et al. (2011) rightly point out; and the IT industry is a good example hereof,

where many IT organizations, being IT companies or IT divisions in companies from other industries, have begun a journey into becoming global and multi-cultural organizations, with staff split across different locations in different countries (Contractor et al., 2010). As outlined above there is ample opportunity to contribute to social science with empirical studies of global work; and I believe that there is ample opportunity to study trust and trustworthiness in an empirical context of global work in general – and global IT work in specific – too. Below I shall briefly outline three suggestions for future empirically founded studies of trust in a context of global IT work.

The empirical foundation of this dissertation has been an offshore outsourcing engagement. Arguably, the fact that it is an outsourcing scenario with two different organizational entities involved introduces unique complexities. I suggest that future work should look into captive offshoring, where a company has established its own legal entity in the offshore country, as I speculate that this could provide a more clean-cut empirical foundation, where organizational distribution plays a smaller role.

Another avenue of future research on trust in global IT teams could be to take a closer look at the vendor-side perspective. I have argued why my focus has been on the client-side actors' perceptions of vendor-side trustworthiness, but nevertheless I believe that taking a vendor-side perspective and investigating their trust in and perceptions of client-side actors trustworthiness, is called for. As mentioned I would not have had adequate data to support such an investigation, which is undoubtedly partly related to the fact that most of my empirical research has been conducted at the client's premises. However, I believe that a vendor-side focus could probably elaborate significantly on the challenges related to acting with proactiveness. Interestingly, on many occasions when I have engaged with vendor-side actors, during interviews as well as informal conversations, they have elaborated on the importance of client-side actors trusting them, but without suggesting that their own trust in client-side actors is

important. On some occasions I have specifically addressed this question by asking vendor-side actors about the necessity of trusting the client; and on several occasions I have been answered first by a puzzled look on their faces; and subsequently a remark in the lines of “I suppose so”. To me this does not suggest that vendor-side trust in the client is unimportant, but rather that it is heavily under-exposed.

Finally, I believe that empirical research on global work that entails more than two locations, and perhaps even more than two organizational entities too, is a promising path for future research. Indeed, such *truly* global work may introduce a whole new level of complexity to scholarly work. In addition, it seems that within the IT industry there is a movement towards increasingly complex delivery models, including locations all around the globe and multi-vendor setups. Thus, the IT industry is breaking new ground, providing new vistas for scholarly contributions on global collaboration.

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