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# Balancing autonomy and accountability: rethinking performance management in hybrid work

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**Purpose:** This study explores how managers and professional employees in the South African banking sector perceive the balance between autonomy and accountability in hybrid and remote work environments. While global research has examined flexibility and engagement, limited attention has been given to how communication, trust, and digital monitoring shape performance management in distributed South African contexts.

**Design/methodology/approach:** A qualitative, phenomenological research design was employed to capture lived experiences of remote and hybrid work. Semi-structured interviews were conducted with twenty-one participants, including managers and professional employees, using purposive sampling. Data were analyzed inductively through reflexive thematic analysis to identify patterns of communication, trust, monitoring, and organizational support influencing individual and organizational performance.

**Findings:** Participants valued flexibility, autonomy, and improved work–life balance as key enablers of engagement and productivity. However, they also reported challenges such as isolation, blurred boundaries, and technostress. Managers emphasized the need for structured feedback, digital equity, and trust-based performance monitoring to sustain accountability. The findings reveal that adaptive performance management anchored in trust, communication, and equitable access to resources enhances both employee well-being and organizational effectiveness in distributed work environments.

**Research limitations/implications:** The study's qualitative focus and single-institution context constrain generalizability. Future research could employ longitudinal or mixed-method approaches across industries to examine how performance management practices evolve within hybrid and remote work models.

**Originality/value:** This research contributes to the limited body of qualitative evidence on performance management in hybrid and remote contexts within developing economies. By integrating Social Exchange Theory and the Job Demands–Resources model, it advances understanding of how reciprocity, trust, and resource equity sustain engagement and productivity in digitally mediated work environments.

## KEYWORDS

accountability, autonomy, communication, hybrid work, Job Demands–Resources model, performance management, remote work, Social Exchange Theory

## Introduction

In contrast to the traditional 9-to-5 office routine of the 1990s, where employees shared fixed schedules in physical workplaces, contemporary work arrangements have become far more dynamic and flexible. Employees remain the driving force of organizational success, and their productivity, engagement, and well-being are critical to competitiveness (Fridan and Maamari, 2023; Ramly, 2018). The COVID-19 pandemic accelerated an unprecedented transformation of work by forcing organizations to adopt large-scale remote and hybrid arrangements, underpinned by digital communication technologies and virtual collaboration platforms (Ajzen and Taskin, 2021). This shift was not merely a temporary response but a structural change that continues to influence how organizations function and employees perform their roles.

Globally, the impact of COVID-19 was immediate and disruptive. Lockdowns, social distancing measures, and the closure of physical offices compelled organizations to transition knowledge work online almost overnight (Kupferschmidt and Cohen, 2020; Felstead and Reuschke, 2020). In South Africa, this shift was equally pronounced. In 2020, over 38% of the active qualifying workforce worked remotely, compared to just 4% pre-pandemic (Winkler-Titus et al., 2025; Mohase et al., 2025; Intasure, 2020). Rust et al. (2025) further note that hybrid work participation among professionals increased from 32% pre-pandemic to 79% during the pandemic (McCarthy, 2022). Post-pandemic, the trend appears enduring: 89% of South African professionals expect remote work to continue in some form, with a strong preference for full-time hybrid arrangements (Rust et al., 2025).

Similarly, Kopt and Seqhobane (2024) report that although approximately 21% of professionals had worked from home prior to the pandemic (Fernandes, 2021; McCarthy, 2022), this figure rose sharply to 79% post-pandemic, reflecting a widespread reconfiguration of work practices in South Africa. The adoption of remote work has also yielded positive performance-related outcomes. A national survey by Michael Page (Raze, 2023) involving over 200 South African professionals revealed that 63% experienced increased productivity while working remotely, and more than half reported heightened motivation. Importantly, 71% anticipated that flexible work would become more significant in the post-pandemic job market.

Taken together, these patterns illustrate not only the permanence of hybrid work in South Africa but also the urgent need to understand how such arrangements influence performance within highly regulated sectors such as banking. Understanding hybrid work specifically within the South African banking sector is crucial, as its regulatory intensity, cyber-security requirements, and customer-driven performance pressures create dynamics that differ markedly from other industries. As shown in recent research, the sector operates under strict governance and remuneration oversight (Kieviet et al., 2024), entrenched hierarchical cultures that shape communication and employee voice (Choeni et al., 2025), and adaptive leadership demands that intensified during the transition to remote and hybrid work (Yozi and Mbokota, 2024). The banking sector must safeguard sensitive financial data, maintain uninterrupted service delivery, and uphold stringent compliance standards, all of which create unique challenges for

communication, trust, leadership, and monitoring in hybrid environments. Additionally, digital transformation initiatives within banks continue to be shaped by regulatory constraints, technological risk, and the need for highly coordinated processes, as evidenced by the transition from traditional to agile project management approaches in South African banks (Mahadeo, 2024). Together, these distinct characteristics position the banking sector as an ideal and empirically justified context for examining how hybrid work practices affect employee and organizational performance. While the pandemic accelerated hybrid and remote working arrangements, it also exposed questions regarding organizational and governmental preparedness for such a transition. As Maluleke (2024) observes, during lockdowns many public-sector service delivery points were forced to suspend walk-ins, shifting instead to alternative communication channels such as telephone and email. Physical meetings were replaced by virtual platforms, and government departments operated at reduced capacity (often 50%) to minimize congestion. These adaptations provided a real-time preview of hybrid work systems and highlighted both the opportunities and challenges for sustained implementation.

This shift reflects a global trend and highlights how rapidly South African organizations had to adapt. Scholars such as Mergener and Trübner (2022) have called for more research into employees' workplace preferences, including work location, to understand these transitions better. Remote and hybrid work have since become widespread in South Africa (Munyeka, 2024; Winkler-Titus et al., 2025). Although working from home was not entirely new, the sudden and involuntary transition from office to home at the onset of the pandemic created both benefits and disadvantages for employees and organizations (Munyeka, 2024; Winkler-Titus et al., 2025).

It is essential to distinguish between key concepts in contemporary work arrangements to provide clarity. Remote work refers to work performed away from traditional office settings, including home-based work, satellite offices, telecenters, or mobile and nomadic practices (Li, 2024). Within this broader category, work from home (WFH) denotes tasks carried out primarily from employees' residences (Li, 2024). Hybrid work (HW) combines on-site work at the employer's premises with remote work, supported by digital collaboration tools and emphasizing flexibility and autonomy (Crummenerl et al., 2020; Vartiainen and Vanharanta, 2024). Flexible work allows variations in hours, location, or both (Ardi et al., 2024). Virtual work involves tasks performed through digital platforms rather than face-to-face interactions (Hill et al., 2024). Understanding these distinctions is critical for examining how contemporary work arrangements affect employee performance.

Remote and hybrid models offer employees autonomy, flexibility, and improved work-life balance, but they also present challenges. Employees report workplace isolation, blurred boundaries between work and personal life, and heightened stress, while managers struggle with trust development, communication barriers, and sustaining organizational culture (Caringal-Go et al., 2021; Brucks and Levav, 2022). Empirical studies conducted during enforced lockdowns demonstrate that remote working intensified work-life interface tensions, particularly for employees

with caregiving responsibilities and limited boundary control (Anderson and Kelliher, 2020; Vaziri et al., 2020; Janza, 2021). These developments raise critical questions about productivity and performance. Remote work requires managers to adapt leadership approaches, clarify performance expectations, provide structured feedback, and foster trust and accountability through digital tools and frequent check-ins (Aguinis and Burgi-Tian, 2021; Mortensen and Haas, 2021).

Effective communication is fundamental to performance in remote settings, yet its nature shifts from face-to-face interactions to digital channels. Studies show that a lack of structured communication can lead to misunderstandings, decreased team cohesion, and lower productivity (Ajzen and Taskin, 2021). Conversely, frequent and clear communication, especially through video conferencing and instant messaging, can mitigate feelings of isolation and improve collaboration (Chen et al., 2022). However, excessive digital communication can contribute to burnout and “Zoom fatigue” (Winkler-Titus et al., 2025).

Trust is another critical variable, as managers can no longer rely on physical presence to ensure work is done. Research suggests that high levels of trust between managers and employees positively correlate with productivity, job satisfaction, and psychological safety (Mortensen and Haas, 2021). Without trust, managers may resort to excessive monitoring, which can be counterproductive.

Monitoring has also become a key factor. While some organizations use digital tools to track employee activity, the literature is mixed. Monitoring can improve performance by ensuring accountability and enabling data-driven feedback (Aguinis and Burgi-Tian, 2021), but overly intrusive monitoring undermines trust and increases stress (Munyeka, 2024). A balanced approach is therefore essential.

This lack of clarity is especially pressing in South Africa, where little is known about how remote and hybrid practices influence employee and organizational performance, particularly in the banking industry. Existing scholarship has focused largely on well-being, stress, or work–life balance, while the implications for performance management remain underexplored (Ngonini, 2025; Tenakwah and Watson, 2024). This study therefore examines how communication, trust, and monitoring shape employee performance and organizational outcomes in remote and hybrid banking environments. To address this gap, the study is guided by the following research questions, which collectively focus on the core mechanisms influencing performance in distributed work settings.

## Research questions

- How do communication practices influence employee performance in remote and hybrid work arrangements within the South African banking sector?
- How does trust between managers and employees affect performance outcomes in hybrid and remote banking environments?
- How do monitoring practices shape employee performance and organizational effectiveness in remote and hybrid banking settings?

## Research objectives

- To analyse the relationship between communication practices and employee performance in hybrid and remote banking environments.
- To examine how managerial trust influences performance outcomes among hybrid and remote banking employees.
- To evaluate the role of monitoring practices in shaping performance and organizational outcomes in the South African banking sector.

## Theoretical framework

### Social Exchange Theory

Social Exchange Theory (SET) explains workplace behavior as a function of reciprocal exchanges between employees and employers, where supportive practices such as trust, autonomy, feedback, and flexibility foster positive attitudes, engagement, and performance (Blau, 1964; Aryee et al., 2015; Biron et al., 2022). In hybrid work environments, where visibility is reduced and reliance on digital tools increases, SET highlights how clear communication, structured feedback, and managerial support cultivate trust and motivate employees to reciprocate with commitment and strong performance (Choi et al., 2019; Cropanzano and Mitchell, 2005).

Remote and hybrid work arrangements further intensify the need for mutual trust. Managers rely on digital monitoring and virtual feedback mechanisms, while employees respond to supportive practices with increased engagement and performance (Bloom et al., 2015; Choudhury et al., 2022). Leadership plays a critical role in sustaining this exchange, as transparent communication, empowerment, and outcome-focused support strengthen employees’ reciprocal investment in performance (Bravo-Duarte et al., 2025; Anuradha et al., 2025).

Taken together, SET provides a strong explanatory basis for understanding how reciprocal exchanges particularly trust-based leadership, communication clarity, and autonomy translate hybrid working arrangements into performance outcomes.

### Job Demands–Resources Theory

Job Demands–Resources (JD-R) Theory (Bakker and Demerouti, 2017) complements SET by explaining how job demands (e.g., isolation, technostress, blurred boundaries) and job resources (e.g., autonomy, ICT support, managerial guidance) shape engagement and performance in hybrid environments. These assumptions are consistent with early technostress scholarship, which highlighted how sustained exposure to digital technologies can undermine well being and performance when coping resources are inadequate (Weil and Rosen, 1997). When resources sufficiently counterbalance demands, employees sustain motivation and performance.

Research shows that hybrid work amplifies both demands and resources: autonomy reduces overload, ICT support mitigates technostress, and managerial guidance buffers isolation (Beckel

and Fisher, 2022; Yang et al., 2023). From a broader stress perspective, this dynamic aligns with Conservation of Resources theory, which posits that stress emerges when individuals experience actual or threatened resource loss without sufficient replenishment (Hobfoll, 1989). Technology-related pressures can undermine productivity, but resource-rich environments enhance performance and engagement (Ragu-Nathan et al., 2008; Ayyagari et al., 2011). JD-R is particularly useful for performance-focused research, as it explains why some employees thrive and others struggle in hybrid arrangements depending on the availability of compensatory resources (VargasLlave et al., 2022).

## Integration of SET and JD-R

Together, SET and JD-R provide a comprehensive and highly relevant theoretical lens for this study. SET clarifies *why* employees reciprocate supportive hybrid work practices through trust, communication, and perceived fairness by investing effort, commitment, and performance. JD-R clarifies *how* specific demands and resources shape employees' capacity to sustain performance in remote and hybrid contexts. Integrating these perspectives is particularly valuable in hybrid work environments characterised by uneven digital readiness and socio economic disparities, where resource loss and gain cycles are highly salient (Hobfoll, 1989; Janza, 2021). In hybrid work environments, supportive organizational practices (e.g., leadership communication, feedback, autonomy) function simultaneously as:

- SET-based relational signals that strengthen reciprocal motivation, and
- JD-R resources that enable employees to meet elevated cognitive, emotional, and technological demands.

Conversely, inadequate resources or ambiguous expectations weaken reciprocal exchanges (SET) and amplify job demands (JD-R), reducing engagement and performance. Integrating these theories therefore provides a robust foundation for analyzing how communication, trust, monitoring practices, and resource availability collectively influence employee performance in South Africa's hybrid banking sector.

## Contextualization of hybrid work

Remote work, defined as performing job tasks outside the conventional office setting, encompasses telecommuting, virtual work, and distributed work arrangements (Halford, 2005; Fernandes, 2021). A closely related term, virtual-work describes individuals, groups, or organizations that do not interact face-to-face due to geographic dispersion, instead relying on technology for collaboration (Allen et al., 2015). Remote working is broader than telecommuting, including work at branch locations or other business units (Vega et al., 2015). Since the start of the COVID-19 pandemic, remote working has become widely used to describe work done mainly from home due to lockdowns and social distancing. It is often used interchangeably with "work from home" (WFH). For this study, the terms remote or hybrid work will

be used. Hybrid work blends remote and on-site work, allowing employees to alternate locations while maintaining operational continuity (Xie et al., 2019). Hybrid working has become the predominant form of work as lockdowns have lifted globally and "living with COVID" has become the new reality. In Bloom's (2021) research, 70% of firms interviewed, including Apple, Google, Citi, and HSBC, plan to implement hybrid working so employees can divide their time between collaborating onsite and WFH. Many firms in Australia are also experimenting with the hybrid model, where workers spend 2–3 days in the office and 2–3 days WFH (Productivity Commission, 2021). This model is preferred by most employees who can work from home (Bloom, 2021).

The COVID-19 pandemic accelerated the adoption of remote work globally, transforming it from a niche practice into a mainstream work arrangement and fundamentally reshaping organizational operations and employee experiences (Barrero et al., 2021; Bloom, 2021; Ngonini, 2025; Tenakwah and Watson, 2024). COVID 19 also represented a systemic global disruption that extended beyond workplaces to broader socio economic systems, intensifying uncertainty and structural volatility across industries (Gössling et al., 2021). Organizations across industries shifted to remote and hybrid models almost overnight, reconfiguring workplace structures, performance management practices, and organizational culture. By 2023, flexible work had become embedded in organizational strategies, with many firms embracing hybrid models as the "new normal" (Flex Index, 2023; Gallup, 2021).

Pre-pandemic, fewer than 20% of employees in the United States worked remotely full-time, a figure that increased sharply to 44% following the onset of COVID-19 (Statista, 2021). Surveys indicated that nearly 90% of employees preferred to continue with remote or hybrid work, and approximately one-third would consider leaving their jobs if such options were removed (Gallup, 2021; Owl Labs, 2021). These arrangements offer several benefits at the individual level, including greater autonomy, flexible scheduling, and improved work-life balance (Brucks and Levav, 2022; Vyas, 2022). However, they also present challenges such as workplace isolation, blurred boundaries between work and personal life, family interruptions, and increased stress, all of which can undermine employee well-being and performance (Caringal-Go et al., 2021; Aksoy et al., 2023; Losada-Baltar et al., 2021; Brooks et al., 2020). Hybrid arrangements attempt to balance these advantages and drawbacks. Yet, they introduce additional complexities, including managing communication between co-located and remote team members, sustaining trust, and addressing diverse employee preferences and work styles (Aksoy et al., 2023).

The shift to remote and hybrid work at the organizational level necessitated rapid adaptation of performance management practices, digital collaboration tools, and communication routines (Mabaso and Manuel, 2024). Clear articulation of expectations, regular feedback, and trust-based relationships have become essential to maintaining accountability and productivity in distributed work environments (Aguinis and Burgi-Tian, 2021; Mortensen and Haas, 2021; Prasad and Vaidya, 2020). Digital platforms for collaboration and performance monitoring now play a critical role in supporting teamwork, aligning deliverables, and sustaining organizational culture despite physical separation (Ngonini, 2025; Tenakwah and Watson, 2024). Despite the global

benefits of remote work, adoption in developing economies such as South Africa has been slower due to structural constraints, including unreliable internet access, technological limitations, and unequal digital readiness (Ngonini, 2025; Tenakwah and Watson, 2024; Shipman et al., 2023; Miceli et al., 2021). These insights extend beyond Wheatley et al.'s (2024) autonomy-control paradox to demonstrate how contextual factors shape the effectiveness of flexible work arrangements. These contextual realities influence employee experiences and organizational outcomes, highlighting the importance of examining remote and hybrid work within local settings. The interplay of flexibility, autonomy, digital tools, performance management practices, and contextual constraints provides a comprehensive understanding of how remote and hybrid work affect individual and organizational performance, underscoring their centrality in the evolving future of work.

## Individual-level impacts of hybrid work

Hybrid work arrangements grant employees greater autonomy over when, where, and how they perform tasks, promoting self-regulation and personal responsibility (Ryan and Deci, 2000; Biron et al., 2022). Flexibility is associated with higher engagement, job satisfaction, and intrinsic motivation, particularly when employees can balance work demands with personal commitments (Biron et al., 2022; Teevan, 2022). However, research indicates that without adequate boundary management support, autonomy may intensify work-family conflict and emotional exhaustion in remote settings (Vyas and Butakhieo, 2021; Vaziri et al., 2020). This increased autonomy is a foundation for improved work-life integration, although it also introduces challenges in managing personal and professional boundaries. Building on the flexibility that remote work provides, employees often experience benefits for work-life balance, such as reduced commuting time and the ability to schedule work around personal needs. However, these advantages may be offset by increased role conflict, interruptions from family members, and social isolation (Losada-Baltar et al., 2021; Britt et al., 2021). Pandemic era evidence further shows that prolonged remote working under crisis conditions contributes to burnout and psychosomatic strain when organizational and personal resources are insufficient (Barello et al., 2020). Research conducted during the COVID-19 lockdowns found that personal resources, such as self-efficacy and coping mechanisms, mitigated psychological distress, while personal demands, such as health risks to oneself or family, amplified stress and anxiety (Losada-Baltar et al., 2021; Britt et al., 2021). Successful work-life balance in remote settings largely depends on individuals' capacity to establish boundaries and the presence of organizational support for flexible arrangements. Autonomy and work-life balance dynamics directly influence individual productivity and communication experiences. Productivity outcomes vary based on personal circumstances, task characteristics, and work environment setup. Some employees report enhanced focus and efficiency due to reduced office distractions and personalized workspaces, whereas others face challenges from home-based interruptions or a lack of structured routines. Additionally, remote work reshapes workplace communication: while online meetings enhance efficiency, they limit spontaneous interactions that often foster creativity and informal learning (Brucks and Levav, 2022). Research indicates

that employees with strong self-regulation skills and adequate home office setups tend to maintain or improve productivity, while those facing family demands, technical limitations, or communication barriers may struggle (Goswami and Musk, 2023; Brucks and Levav, 2022). These variations highlight the importance of organizational strategies that accommodate diverse individual needs to optimize performance.

## Organizational-level impacts

The individual experiences of autonomy, work-life balance, and productivity necessitate fundamental shifts in organizational approaches, beginning with trust and culture. Remote and hybrid work requires high level of trust between managers and employees, as traditional physical supervision is limited. Research shows that trust and frequent communication strengthen commitment and engagement, preserving organizational culture despite spatial separation (Cropanzano and Mitchell, 2005; Biron et al., 2022). Organizations that successfully maintain strong cultures in distributed settings invest in regular communication, reinforce shared values, and implement trust-building practices that acknowledge employee autonomy while sustaining connection to organizational goals. Building on this foundation of trust, effective performance management becomes central to sustaining productivity in distributed work arrangements. Managers must clearly communicate expectations, provide regular feedback, and monitor outputs using digital collaboration tools (Aguinis and Burgi-Tian, 2021; Choudhury et al., 2021). Success hinges on balancing structured oversight with employee autonomy, ensuring accountability without undermining motivation or flexibility (Mortensen and Haas, 2021). Performance management systems should focus on outcomes rather than presence, accommodating the diverse productivity patterns observed at the individual level. Organizations can benefit significantly when trust, culture, and performance management practices are effectively aligned. Empirical evidence demonstrates that employees who work remotely voluntarily can increase productivity by over 4% (Choudhury et al., 2021), while structured remote programs have produced nearly 30% gains in productivity alongside substantial cost savings (Bloom et al., 2015). Supportive remote work policies also enhance employee engagement, retention, and productivity, reduce operational costs, improve resource allocation, and foster innovation by leveraging a distributed talent pool (Bloom et al., 2024; Friedman, 2007; Thomas and Maurice, 2020; Pérez Pérez et al., 2003; Choudhury et al., 2021). Beyond performance and culture, equity and inclusion considerations are critical in distributed work. Access to reliable digital infrastructure and resources is uneven, particularly in emerging economies, creating disparities in employees' ability to participate effectively (Ngonini, 2025). Generational and socio-economic differences further shape adaptability to remote work technologies and practices (Tenakwah and Watson, 2024). Organizations must address these equity challenges through targeted technology support, digital skills training, and flexible accommodation policies that recognize diverse circumstances. Failure to address systemic inequities risks undermining the organizational benefits of remote and hybrid work by excluding portions of the workforce from full participation.

## Research method

### Research paradigm and approach

This study adopted an interpretivist phenomenological paradigm, which assumes that reality is socially constructed and best understood through individuals' subjective meanings and lived experiences (Merriam, 2009; Ravitch and Carl, 2021). Guided by this paradigm, a qualitative exploratory approach was employed to investigate how employees and managers perceive and experience hybrid and remote work performance management. This approach was appropriate as it enables an in-depth examination of under-researched phenomena and captures the nuanced realities of participants' working lives (Leavy, 2014).

### Research strategy

The research strategy comprised semi-structured interviews and inductive reflexive thematic analysis, situated within an interpretivist paradigm. Interpretivism recognizes that reality is socially constructed and that individuals create subjective meanings from their experiences (Creswell, 2014b; Merriam, 2009). This paradigm was appropriate for exploring how managers and professional employees make sense of performance management in hybrid and remote work contexts. Semi-structured interviews enabled participants to articulate their lived experiences in their own words, capturing the nuances of their perspectives and the contexts shaping them. Reflexive thematic analysis (Braun and Clarke, 2021, 2023) allowed for systematic identification and interpretation of patterns across the dataset while acknowledging the researcher's active role in knowledge construction. This alignment between paradigm and method ensures conceptual clarity and methodological consistency.

### Study sample and recruitment

The study included 21 participants, comprising 8 managers and 13 professional employees from a major South African bank. Managers were required to have at least 5 years of managerial experience, and professional employees at least 3 years in their roles, ensuring meaningful exposure to hybrid and remote working arrangements. Participants were purposively selected to ensure variation in gender, job level, and work experience. Recruitment was conducted via email invitations outlining the purpose and procedures of the study, followed by reminders after 2 and 4 weeks. Interviews were scheduled consecutively until data saturation was reached.

### Data collection and analysis

Data were collected through semi-structured interviews conducted via Microsoft Teams, each lasting 45–60 minutes. All interviews took place between March and July 2025, during a period when hybrid work practices had stabilized post-pandemic, providing rich insights into routine rather than crisis-driven experiences. Interviews were audio-recorded, transcribed verbatim, and anonymized. The interview guide included open-ended

questions exploring participants' lived experiences of hybrid and remote work. Examples included:

- “Can you describe a typical day working in a hybrid or remote arrangement?”
- “What challenges do you face in managing or performing tasks remotely?”
- “How has remote work affected your engagement and performance?”
- “What organizational practices support or hinder your effectiveness in a hybrid or remote setting?”

An inductive thematic analysis approach was used to identify patterns and develop conceptual insights (Saunders, 2009). Braun and Clarke's (2021; 2023) six-phase process guided analysis: familiarization, coding, theme development, reviewing, refining, and reporting. To enhance dependability, two independent coders analyzed the transcripts. Discrepancies were resolved through discussion until consensus was achieved, ensuring intercoder reliability.

### Trustworthiness

Methodological rigor was established using widely recognized qualitative trustworthiness criteria (Connelly, 2014a; Polit and Beck, 2014):

- **Credibility:** Clear communication of interview questions, verbatim transcription, and participant verification of responses.
- **Transferability:** Thick descriptions of the research context and participant characteristics.
- **Dependability:** Maintenance of an audit trail documenting analytic decisions and procedures.
- **Confirmability:** Ensuring findings were grounded in participants' accounts, supported by raw data excerpts and field notes.

As human capital scholar with professional exposure to performance management, the first author maintained a reflexive journal and engaged in regular debriefing with a second coder to surface and bracket assumptions. This reflexive stance is consistent with phenomenological inquiry and is treated as a methodological asset rather than a limitation.

These strategies ensured the authenticity, reliability, and practical relevance of the findings.

## Findings

The coding phase identified five main themes derived from recurring patterns in participants' accounts of hybrid work and its influence on performance. These themes are presented below. Table 1 illustrates the coding process from first-order verbatim statements to second-order categories and aggregate themes. In addition to the thematic coding, Table 2 presents a comparative summary of employee and manager perspectives across the five themes.

## Theme 1: management, leadership, and organizational culture

Participants consistently described management style and organizational culture as foundational to effective hybrid work. Employees highlighted the importance of supportive and responsive leadership, explaining that trust from managers enhanced their motivation and sense of accountability. As one employee noted, *“When management trusts us to manage our tasks, it really motivates me to perform at my best”* (T7). Managers similarly emphasized relational leadership but focused specifically on the need to maintain cohesion, provide clarity, and address challenges proactively. One manager explained, *“Leadership that listens and incorporates our input makes conflict less stressful and improves team morale”* (T1). Participants also described virtual recognition, online team-building, and digital collaboration practices as important ways of maintaining organizational culture in hybrid settings. These practices strengthened cohesion and supported alignment despite physical distance.

Employees emphasized that trust, recognition, and responsive leadership were central to motivating them and enhancing their sense of accountability in hybrid work settings, describing increased commitment when leaders demonstrated confidence in their autonomy. Managers, however, focused on their responsibility to maintain cohesion through active listening, conflict resolution, and providing clear guidance. While employees viewed leadership as relational support that strengthened morale, managers understood it as a strategic function necessary for sustaining alignment and productivity across dispersed teams.

## Theme 2: autonomy, flexibility, and work organization

Autonomy and flexibility emerged as highly valued aspects of hybrid work. Employees frequently reported that flexible scheduling supported their ability to meet deadlines and manage personal responsibilities, thereby enabling better focus and productivity. One employee shared, *“Being able to choose my work*

*hours helps me balance family needs and deadlines”* (T10). Others noted that autonomy came with challenges, including difficulty disconnecting and managing blurred boundaries. Managers emphasized performance benefits, reporting that autonomy reduced the need for constant oversight and encouraged employees to take greater ownership of their work. As one manager stated, *“Flexible work arrangements allow my team to manage their workload without constant oversight”* (T2).

Employees valued autonomy and flexibility for enabling them to organize work efficiently alongside personal responsibilities, noting that self-managed schedules improved their ability to meet deadlines and maintain focus. Managers expressed that flexibility enhanced performance by reducing the need for constant oversight and encouraging employees to take ownership of their tasks. Although some employees struggled with blurred boundaries, they generally viewed flexibility as empowering, while managers

TABLE 2 Participant comparison.

Theme	Employee perspective	Manager perspective
1. Management, leadership, and organizational culture	Trust and responsiveness from management enhance accountability and morale.	Active leadership, listening to input, and resolving conflicts sustain team performance.
2. Autonomy, flexibility, and work-life balance	Value self-managed schedules and work-life integration.	Flexibility enables teams to manage workloads without constant oversight.
3. Performance, productivity, and organizational support	Clarity in goals, structured feedback, and timely IT support sustain output.	Provision of tools, guidance, and monitoring ensures smooth team performance.
4. Communication, collaboration, and trust	Frequent updates and clear communication prevent misunderstandings.	Fosters transparency, encourages information sharing, and builds trust across teams.
5. Learning, adaptation, and equity	Training improves skills, confidence, and smooth adaptation to remote work.	Ensures equitable access to resources and inclusive support for all employees.

TABLE 1 Coding structure.

First-order codes	Second-order category	Aggregate theme	Participant codes
<i>“When management trusts us to manage our tasks, it really motivates me to perform at my best.”</i>	Trust and responsiveness	Management, Leadership and organizational culture	T7, T10, T12
<i>“They acknowledge our efforts even online, which helps keep the team connected.”</i>	Recognition and cohesion practices	Management, leadership and organizational culture	T3, T5, T13
<i>“Being able to choose my work hours helps me balance family needs and deadlines.”</i>	Scheduling flexibility	Autonomy, flexibility, and performance conditions	T10, T12, T14
<i>“Clear goals and regular feedback help me stay productive even when working remotely.”</i>	Structured feedback	Performance, productivity and organizational support	T8, T5, T14
<i>“Regular virtual check-ins help me stay aligned with the team and avoid misunderstandings.”</i>	Transparent communication	Communication, collaboration and trust	T7, T12, T14
<i>“Training on digital tools made the transition much smoother.”</i>	Upskilling and adaptability	Learning, adaptation, and equity	T4, T7, T13, T14

regarded it as a practical mechanism that promoted accountability and smoother workload management.

### Theme 3: performance, productivity, and organizational support

Organizational support mechanisms, clarity, feedback, IT reliability, and structured processes were consistently described as essential for sustaining productivity in hybrid environments. Employees emphasized that clear expectations and feedback helped them remain focused and avoid uncertainty. One noted, *“Clear goals and regular feedback help me stay productive even when working remotely”* (T8). Technical support was also vital, with another participant stating, *“Timely IT support prevents unnecessary stress and downtime”* (T14). Managers reinforced the importance of organizational infrastructure, emphasizing their role in providing resources and ensuring workflow continuity. One manager reflected, *“Providing my team with proper tools and guidance ensures work continues smoothly from home”* (T5).

Employees consistently linked clear goals, regular feedback, and reliable IT support to their ability to maintain productivity remotely, emphasizing that clarity and stability reduced disruptions and unnecessary strain. Managers, meanwhile, stressed their role in ensuring access to appropriate tools and structured processes that supported performance and mitigated workflow inconsistencies. Whereas employees focused on how support directly enhanced task execution, managers viewed organizational support as a foundation for monitoring progress and sustaining collective output.

### Theme 4: communication, collaboration, and trust

Communication was highlighted as a central mechanism for ensuring alignment, building trust, and preventing misunderstandings in hybrid teams. Employees described predictable communication routines as essential for maintaining clarity, reducing confusion, and supporting collaborative work. One participant said, *“Regular virtual check-ins help me stay aligned with the team and avoid misunderstandings”* (T14). Managers prioritized information-sharing and transparency as strategies for maintaining team cohesion. One manager explained, *“Encouraging team members to share updates fosters collaboration and trust across remote teams”* (T3). Employees described communication as essential for maintaining alignment, avoiding misunderstandings, and ensuring accurate task completion. They valued predictable routines that provided clarity and support. Managers, on the other hand, emphasized transparency and information sharing as tools for strengthening trust, coordination, and oversight across dispersed teams. While employees viewed communication mainly as guidance for task execution, managers saw it as a strategic mechanism for maintaining cohesion and ensuring collective alignment.

### Theme 5: learning, adaptation, and equity

Participants highlighted continuous learning, digital upskilling, and resource access as critical for sustaining performance in hybrid work. Employees described training as essential for increasing confidence with digital tools and adapting to new work processes. As one stated, *“Training on digital tools made the transition to remote work much smoother”* (T13). Access to infrastructure also directly influenced productivity, with one participant explaining, *“Access to reliable data and equipment made all the difference”* (T14). Managers emphasized inclusive provisioning, noting that disparities in home environments required organizational responsiveness to ensure equitable performance conditions. One manager shared, *“I appreciate when the organization considers everyone’s needs, especially those with limited home resources”* (T4).

Employees emphasized that continuous learning opportunities, digital training, and access to adequate resources enhanced their capacity to adapt and maintain performance in hybrid settings. Managers, however, underscored the importance of ensuring equity across teams, noting that consistent performance depends on providing fair and inclusive access to resources for employees who face differing technological or environmental constraints. Whereas employees focused on how learning and infrastructure strengthened their personal efficiency, managers viewed equity-oriented support as essential for sustaining performance across diverse teams.

## Discussion

This study set out to investigate how hybrid and remote work arrangements influence individual and organizational performance within the South African banking sector, with a specific focus on the performance management practices that enable employees to function effectively in distributed environments. Three core findings emerged: (1) structured digital accountability systems are critical for sustaining performance under infrastructural constraints, (2) equity-conscious resource provisioning enhances employee capability and fairness perceptions in unequal socio-economic contexts, and (3) cultural continuity practices that reinforce Ubuntu principles and organizational identity play a central role in maintaining cohesion and performance during remote work. The findings extend existing hybrid work literature by specifying why particular managerial practices are effective in resource-constrained contexts and how they operate through distinct theoretical pathways. The South African banking environment characterized by infrastructure inequalities, load-shedding, regulated workflows, and socio-economic diversity offers a unique lens for understanding how organizations can structure remote work for success despite systemic challenges.

### Interpretation of findings in relation to theory and literature

The first major contribution concerns the role of structured digital accountability systems. Practices such as regular virtual check-ins, clarified performance expectations, and

predictable feedback cycles functioned as digital reciprocity mechanisms that extend Social Exchange Theory (SET) into technologically mediated environments (Blau, 1964). In a context marked by intermittent connectivity and power disruptions, these structured touchpoints enabled employees to reciprocate managerial investment despite physical distance, challenging assumptions that reciprocity is rooted in face-to-face interactions (Cropanzano and Mitchell, 2005). From a Job Demands–Resources (JD-R) perspective, structured digital systems operate as technological job resources that buffer against infrastructural job demands unique to developing contexts, such as erratic power supply and limited connectivity (Bakker and Demerouti, 2017). This supports McPhail et al.'s (2024) argument that structured performance management is essential for maintaining psychological safety in unpredictable environments.

The second major finding relates to equity-conscious resource provisioning. Home office equipment, data allowances, and targeted technical support especially for employees from historically disadvantaged communities emerged as critical job resources and powerful reciprocal signals. When organizations invested in equalizing remote working conditions, employees responded with heightened organizational commitment, demonstrating that equity-sensitive resources amplify SET reciprocity within unequal socio-economic contexts (Biron et al., 2022; Ngonini, 2025). JD-R theory is also extended here: equity-sensitive resources reduce infrastructural job demands while simultaneously enhancing motivation through perceived fairness, addressing the digital divide that shapes hybrid work experiences in emerging economies (Losada-Baltar et al., 2021).

The third contribution concerns cultural continuity practices that actively maintain Ubuntu-oriented cohesion and organizational identity in digital workspaces. Practices such as virtual storytelling, shared rituals, and digital recognition operated as cultural job resources distinct from conventional social resources (Mabaso et al., 2024; Bakker and Demerouti, 2018). These practices expanded SET by incorporating cultural reciprocity rooted in African collectivist values (Blau, 1964; Bilderback and Kilpatrick, 2024; Shet, 2024). They also buffered isolation-related job demands and enhanced meaning-making, aligning with Naqshbandi et al.'s (2023) findings on the importance of culturally meaningful engagement mechanisms.

Taken together, these contributions show that SET and JD-R require contextual adaptation when applied in emerging-economy settings characterized by infrastructural volatility and socioeconomic diversity.

## Contextual contributions

A key contribution of this study is its illumination of how hybrid work unfolds within the South African banking sector, an area largely absent from existing remote work literature. Unlike studies situated in developed economies (Bloom et al., 2015; Choudhury et al., 2021), this research demonstrates that the digital divide shapes employees' ability to participate fully in remote

work. Successful banks implemented transparency-enhancing practices that made remote work contributions visible across racial and hierarchical lines, addressing Dale et al.'s (2024) concerns about boundary management and well-being variations across demographic groups. Employees in well-resourced areas experienced minimal disruption, while those in townships required substantial organizational support to achieve comparable performance. The sectorspecific context is therefore treated as an intentional analytical boundary rather than a limitation. Insights regarding compliance with POPI and SARB regulations (Jaiswal and Prabhakaran, 2023), infrastructure unpredictability, and hierarchical racial dynamics represent valuable contextual contributions for understanding hybrid work in regulated industries and emerging economies (Nwankpa and Roumani, 2024).

## Practical implications

The findings offer several important implications for managers and HR practitioners. First, structured digital accountability systems should be prioritized because they ensure visibility, clarity, and reciprocal trust while avoiding the negative connotations of surveillance. Managers must shift from monitoring physical presence to facilitating outcome-based performance cultures through consistent digital communication.

Second, equity-conscious resource provisioning should be embedded as a core performance enabler rather than an optional support mechanism. Providing data allowances, ergonomic equipment, and rapid technical assistance reduces job demands, signals organizational fairness, and strengthens engagement and retention.

Third, cultural continuity practices require deliberate cultivation in hybrid environments. Upholding Ubuntu values and reinforcing organizational identity through digital platforms enhances cohesion, strengthens meaning-making, and buffers against isolation.

Collectively, these insights suggest that effective hybrid work management in emerging economies requires an integrated approach in which accountability structures, resource equity, and cultural reinforcement operate interdependently to sustain performance under infrastructural and socioeconomic complexity.

## Limitations

While the study offers deep contextual insight, certain limitations should be acknowledged. First, the sample was drawn from a single organization within the banking sector, which may limit the transferability of findings to other settings. Second, the study reflects experiences captured at a single point in time during an evolving transition to hybrid work. Longitudinal research could track how performance management practices and employee experiences shift as hybrid arrangements mature. Researcher positionality is addressed within the methodology section as an inherent and necessary component of phenomenological inquiry rather than a study limitation.

## Directions for future research

This study highlights several avenues for future research. Longitudinal studies are needed to examine how reciprocity dynamics, resource requirements, and performance management practices evolve over time. Comparative research across sectors and countries would help clarify how contextual variables moderate hybrid work outcomes. Future empirical studies should also test the mediating roles of trust, recognition, and equity—constructs that emerged strongly in this study but remain underexamined in hybrid work scholarship. Multi-theoretical models integrating SET, JD-R, and cultural frameworks may offer richer explanatory power for understanding hybrid work effectiveness.

## Conclusion

Overall, the study demonstrates that hybrid and remote work arrangements are enduring features of the future workplace, and their success depends on organizations' ability to balance autonomy with accountability, mitigate job demands with appropriate resources, and maintain cultural connection across distributed environments. By extending SET and JD-R to include digital, infrastructural, and cultural dimensions, this study offers a theoretically enriched and contextually grounded understanding of hybrid work in an emerging-economy, regulated industry.

## Data availability statement

The raw data supporting the conclusions of this article will be made available by the authors, without undue reservation.

## Ethics statement

The studies involving humans were approved by Industrial Psychology and People Management Research Ethics Committee. The studies were conducted in accordance with the local legislation and institutional requirements. The participants provided their written informed consent to participate in this study.

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CM: Conceptualization, Data curation, Formal analysis, Investigation, Methodology, Project administration, Resources, Validation, Visualization, Writing – original draft, Writing – review & editing.

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