Adaptive Forces? How does Military Culture Inhibit, Manage, and Engender Organizational Change?

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1.0 INTRODUCTION

Thank you to Nancy and to Isabelle for inviting me to speak to you all, and to the Organising Committee Members, and to Erik and Krystal for all their hard work in bringing us together for this event.

I want to begin my address with a caveat and then an observation about how I have come to understand military culture. The caveat is that I am an expert on British military culture, and as such, much of what I'll speak about is based on my experiences of researching the British Armed Forces for just over 20 years. I hope of course that my points will have some wider relevance, but it is the UK context that I have spent most of my time researching and that largely informs my understanding of military culture.

The observation that I want to make is about positionality, utilising critical analysis, and innovative research methods. When I began researching British military culture and organizational change in 2002 as a doctoral candidate, I quickly became aware that there were boundaries around who produced knowledge about militaries and how they did this. These boundaries largely relied on ideas about insider versus outsider knowledge and knowledge-production.

As someone who is not, and has never been, a member of the armed forces, I was an outsider to military culture. However, my doctoral research, and much of my subsequent research, centred the voices and experiences of 'insiders'; of those who do serve, have served, or for whom military service has had a profound impact on their lives, such as the family members of military personnel. In order to better understand military culture and organization, I decided that I needed to examine what the British Armed Forces and Ministry of Defence officially claimed about themselves, but also to spend extensive periods of time with the people who comprised the British Armed Forces to see how they experienced military culture. This entailed visiting and staying on military bases, attending different forms of training. It involved eating breakfast, lunch, dinner, and drinking and dancing with military personnel in different mess halls. Over the course of three years, I interacted with and interviewed men and women from across the services, and of different ranks, trades and corps. These men and women came from a range of racial, ethnic, and national backgrounds, and were of different sexual orientations. I spent time with members of the special forces and infanteers, and hung out with cooks and clerks. I listened to those who had deployed - to Northern Ireland, the Falkland Islands, Bosnia, Afghanistan, and Iraq - those about to deploy, and those who had never deployed.

My aim was to share these insights with military leaders, policymakers, and other academics to try to facilitate greater understanding of how individuals and social groupings constitute, negotiate, contest, and reconfigure military practices, culture, and policies. More often than not, this has entailed my critiquing those very practices and policies, and wider military culture, on the basis of what I have heard, seen, and experienced.

There have been three especially common reactions to my methodological approach of centring the voices of

those with experience of military service and using this to critique longstanding military practices. All three could be characterised as positions of suspicion that depend on the idea of insider versus outsider knowledge.

First, for most of the scholars studying armed forces that I encountered around twenty years ago, my emerging work was regarded as both too questioning and too qualitative. The role of the outsider academic studying military culture was broadly understood to be about shedding light on which cultural forces and variables affected how militaries functioned. Whereas so-called solider-scholars might be able to provide insights and critiques based on their 'insider' status, outsiders were assumed to be unable to fully understand or interpret military culture. This largely limited outsiders to examining how civilian cultural change might produce new challenges for military organization and culture. The best methodological approach for examining which variables changed or challenged military functions was considered to be large-scale quantitative research. These studies enabled academics to generalise their findings about shifts in military culture and to avoid the messiness of what were considered subjective experiences embraced by qualitative research[1]. By employing qualitative methods such as ethnography and observation, and focus groups and interviews with military personnel, and then using their voices to critique military practices, I therefore confirmed my status as an outsider for military sociologists. I broke the rules about how outsiders were supposed to produce knowledge about military organization and culture, and to what ends.

Second, my doctoral research was motivated in part by feminist questions about understanding women's experiences, and feminist methods around listening to women's voices. This was another thing that marked me as an outsider for military sociologists because my project was seen as too normative. For many of the feminist scholars I encountered, my work was also regarded as no less problematic, however. This was because the military was seen as an organization of patriarchal violence and therefore not something that feminists should be directly engaging with. My desire to speak directly to military personnel was to become too much of an 'insider'. It risked my becoming too 'militarised' and not feminist or 'outsider' enough.

Finally, my positionality as a 'critical outsider' and my qualitative and engaged approach, has proved unsettling to military personnel, leaders, and policymakers. This position was once summed up especially well by a British woman Army Major. After hearing me speak about some of the gendered experiences of some of the British servicewomen I had interviewed, she stated something along the lines of:

> "everything that you've said rings true in my experience. However, having to hear it from a civilian researcher was hard. It was a little bit like how I can moan about my mother and her quirks, but if someone else criticised her, I'd always defend her, regardless of how truthful those criticisms of her were".

In sum, as an 'outsider' critiquing military organization and culture by drawing on 'insider' experiences, I have frequently broken boundaries around insider versus outsider knowledge, drawn by a range of academics and non-academics alike. It was from my frustration, and that of other scholars, with such binary understandings of knowledge-production that the field of critical military studies (CMS) was born. What many CMS scholars have sought to do is to engage with militaries and defence organisations and actors and not dismiss them and their claims. However, unlike the field of military sociology of twenty years ago, which focused on how social change, usually seen to come from forces external to militaries, would affect military culture and how military organizations functioned, CMS scholars often turn the gaze back onto militaries themselves and question how their own practices can inhibit change, sometimes with significant costs for military personnel.

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[1] For an overview of the functionalist and broadly quantitative foundations of military sociology, see Ouellet, Eric. 2005. 'New Directions in Military Sociology', in *New Directions in Military Sociology*, edited by Eric Ouellet, Whitby: de sitter: 1-36.

2.0 ADAPTIVE FORCES?

The title of my paper questions the notion of adaptative forces because one of the core principles that guide militaries like the British Armed Forces, and security organisations such as NATO, is adaptation. Official statements and doctrine tell us that to react to threats and crises, militaries, and organisations like NATO, need to be able to quickly adjust, acclimatise, and modify in light of those challenges. But how adaptive is military culture? How does it, as I'm suggesting, inhibit, manage, but also sometimes engender, organizational change?

The question of adaptation was central to my doctoral research which more specifically examined how military policy pertaining to equality and diversity was understood, interpreted, and negotiated by British military personnel serving in the British Army, Royal Air Force, and the Royal Navy. When I began my doctoral research in 2002, the UK Armed Forces was being asked to adapt, both to external security challenges posed by the War on Terror, and to a series of changes to personnel policies, which contested longstanding elements of military culture and organization.

Though militaries are often spoken about in operational terms as being capable of rapid reactiveness, culturally, the pace of change around equality and diversity issues within the British Armed Forces has been slow. What I want to do in the remainder of my time is to illustrate why I think this is the case, by drawing on some insights from the snapshot of military culture that I provided between 2002 and 2006 for my doctoral thesis to highlight the difficulties as they existed then. I will also then offer some thoughts on the extent to which the British Armed Forces has adapted to these challenges in the, just shy of, two decades since. I will examine some of the reasons why I think that British military culture inhibits organizational change pertaining to equality, diversity, and inclusion, and why I think some of the ways that it seeks to manage difference makes organizational change difficult. But I will also try to end with some more positive observations on how aspects of military culture can engender organizational change.

2.1 Military Culture as Inhibiting Organizational Change

One of the most significant barriers to organizational change in the British Armed Forces is that, like many militaries, it has traditionally been a bastion of white, heteronormative, masculinity. The effects of this traditional culture were especially evident in 2002 when I embarked on my doctoral research.

Between 1998 and 2006, the UK MoD and Armed Forces held a partnership agreement with the Commission for Racial Equality. This followed a formal investigation by the Commission into the Army's Household Cavalry Regiment that had found clear evidence of both direct and indirect racial discrimination, pertaining to recruitment and selection, and clear evidence of racial harassment. Though the initial investigation focused on the Army, the Commission was also concerned throughout the partnership about low levels of recruitment and retention of ethnic minorities in the Royal Air Force and the Royal Navy, and about strong perceptions among ethnic minority service personnel that a culture of racial discrimination and harassment pervaded all three forces.

Among the cultural barriers to tackling racial discrimination, harassment, and bullying that I found during my doctoral research were an unwillingness to adapt military culture and the pervasiveness of racial stereotyping. For example, white personnel often expressed frustration that they might need to adapt their behaviour by not telling racist jokes or using racist language. Stereotypes about certain racialised groups were also common; for example, soldiers recruited from Fiji were frequently branded as 'wife beaters'. This had the effect of making it hard for individuals assumed to be Fijian to be judged on their individual merits and actions, and of concealing violence in the home perpetrated by other military personnel by characterising it as a 'Fijian problem'.

Just 2 years before I began my doctoral research, anyone discovered to be of a non-heterosexual orientation

was excluded from enlisting or serving in the British military. The UK MoD fiercely fought changes to this policy, discharging the last member of the UK Armed Forces to be expelled under the ban just three days before the court ruling that it had to be lifted. With the lifting of the ban, the official position of the MoD moved quickly however, from the claim that allowing openly gay, lesbian, bisexual, and other non-heteronormative people to serve in the armed forces threatened unit cohesion and operational effectiveness, to this being a 'non-issue'. Whilst many of my interviewees came to similar conclusions, the fact that the ban was lifted on the grounds of sexuality being a private matter made it difficult for many of the service personnel I spoke to who did not identify as heterosexual to engage in simple conversations about their families. The fact that the ban had been in place for several decades also led many heterosexual personnel to assume everyone they served with was also heterosexual. This meant that bragging around heterosexual relationships and displays of affection between heterosexuals were considered 'normal', which sometimes either inhibited individuals post-ban from disclosing that they were not actually heterosexual, or if they did, this made them hyper-visible as 'different' in an organisation assumed to be almost exclusively heterosexual.

By 2002, servicewomen were no longer serving in all-women corps, which had been disbanded in the 1990s, they were now allowed to go to sea, and they were no longer being made redundant on becoming pregnant, as they had until 1991. Servicewomen were still excluded from close combat corps, submarines, and mine clearance diving roles though, and a history of being separate to and still excluded from core parts of the armed forces reinforced a culture of sexism that pervaded the British military at the time of my doctoral research. Among the most common characterisations of servicewomen I encountered were that women only joined the military to have sex with men or find husbands, that women were great at administrative jobs or as nurses but at little else given that they were so physically weak, that women responded in overly emotional ways to orders or in training, and that their getting pregnant inconvenienced others who had to pick up their work or even deploy instead of them.

Despite some significant policy changes, various drives to recruit a more diverse military workforce, and some wider societal changes, since I finished my doctoral research in 2006, a culture where whiteness, heterosexuality, and masculinity are the norm still haunts and inhibits organizational change in the British Armed Forces.

Since 2016, there has been an independent Service Complaints Ombudsman. The Ombudsman's annual reports since 2016 have consistently highlighted that ethnic minority service personnel and servicewomen, of all ethnic backgrounds, are overrepresented in the service complaints system, with bullying, harassment, and discrimination being their most common complaints. The Ombudsman has also reported that only one in ten personnel who experience bullying, harassment or discrimination actually make a Service complaint. The main reasons for not doing so are a belief that nothing would be done or that complaining would have a negative impact on the complainant's career. This suggests that the extent of racial and gendered bullying, harassment, and discrimination is even more widespread than formal complaint figures show.

In the Ombudsman's 2021 report, it was noted that "the underlying issues which lead to complaints remain the same. There has been very little wider cultural change, particularly around the experience of female and BAME [black and minority ethnic] personnel."[2] It also noted that a House of Commons Defence Committee report had found that 1 in 10 servicewomen are still reporting that they have experienced sexual harassment, and that a study into the lived experiences of ethnic minority personnel has not been widely released and that it is not clear if and how its findings have not been acted on.

An MoD 2019 Report on Inappropriate Behaviours, which was conducted in response "to repeated instances of inappropriate and allegedly unlawful behaviour by serving members of the UK Armed Forces", noted several facets of military culture as barriers to addressing inappropriate behaviour. These included a "pack-

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[2] Cited in Centre for Military Justice, 2023. 'At a Glance – a quick overview of the latest evidence on bullying, harassment, service assaults and complaints'. Webpage available at: https://centreformilitaryjustice.org.uk/guide/at-a-glance-the-latest-evidence/

mentality of white middle-aged men, especially in positions of influence whose behaviours are shaped by the Armed Forces of 20 years ago". The report also noted the ongoing use of inappropriate and offensive language, even if unintentional, as an issue, and that up to 36% of Lesbian, Gay, Bisexual and Transgender Service people have experienced negative comments or behaviour from colleagues because of their orientation. Also noted in the report is that military culture and a rigid hierarchy can inhibit interventions from bystanders and prevent those who hold lower ranks from challenging their superiors. It gives examples such as individuals not wanting to be seen as troublemakers and wanting to fit in, and it goes on to suggest that "the level of tolerance and cultural acceptance of inappropriate behaviour" needs to change across every part and level of Defence[3].

One of the conclusions of the report is that organizational change is possible if there is determination from military and defence leaders to change the culture, and that "everything else hangs off that" because "[r]eal cultural change comes only when leaders communicate and role model those behaviours relentlessly"[4]. Whilst as I'll go on to suggest in a moment, how military leaders have sought to manage the greater diversification of the British Armed Forces has not always brought about meaningful cultural and organizational change, I also think it short-sighted to focus primarily on the military's upper echelons. The danger of this is overlooking what some British military personnel call 'young dinosaurs'.

The term 'young dinosaurs' refers to people who have more recently joined the armed forces who are more likely than top military leaders to have been educated in mixed-sex schools, to have grown up with ideas of gender and sexuality being more fluid than once thought, and to have had peers more attuned to the complexities of how racial discrimination and prejudice work. Despite these experiences however, such younger recruits have sought out a military career precisely because they see the Armed Forces as a last bastion of white, heteronormative masculinity. In my doctoral research I found several examples of such 'young dinosaurs' who constantly questioned the authority and expertise of servicewomen in combat-facing roles, who had been serving for far longer than they had, on the basis that only men are proper soldiers. Whilst it might be the case that 'young dinosaurs' have grown up in an ostensibly more tolerant society, as the journalist Susan Faludi reminds us, it is always important to be alert to 'backlash' where social change that brings about greater rights for marginalised grounds can be identified not as progress but as a sign of impending doom for those who have been privileged by longstanding arrangements[5]. Society may play just as big a role in producing young dinosaurs as the Armed Forces, but if military culture continues to be perceived as somewhere that young dinosaurs are welcome or at least left to their own devices, another 20 years could well pass with little organizational change on discrimination, bullying, and harassment.

2.2 Military Culture and Managing Organizational Change

Military policy and practices that seek to manage organizational change are often stunted by both a refusal to revisit longstanding organizational assumptions, and by something linked to this which I'll call the defensiveness of the defence establishment.

To revisit some earlier examples, whilst military leaders quickly realised that allowing non-heterosexual people to serve in the British Armed Forces was actually a non-issue for military effectiveness, military leaders refused to question their assumptions and conventional thinking on sexuality for decades. They did not heed the lessons of scholarly evidence on social cohesion that made clear that sexuality would not threaten operational effectiveness. The MoD only overturned its policy because it was required to by law,

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[3] UK Ministry of Defence, 2019. *Report on Inappropriate Behaviours.* London: TSO. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/817838/20190607_Defence_Report_Inappropriate_Behaviours_Final_ZKL.pdf

[4] Ibid.

[5] Faludi, Susan. 1993. *Backlash: The Undeclared War Against Women.* London: Vintage.

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following a legal challenge from military personnel. The full costs to individuals of this policy are unknown but are currently the subject of an independent review for the UK Government due to report later in 2023[6].

By 2010, women were permitted to undertake mine clearance diving roles and by 2011, could serve on submarines. Ten years after I completed my doctorate, the then UK Prime Minister, David Cameron, announced at the 2016 NATO Summit that the close combat ban would be lifted, but as I have shown in some of my work, these bans were based on a refusal to take scholarly evidence seriously and instead rely on problematic assumptions about gender and womanhood. In my research I found that these assumptions, and the way that the British military chose to manage these roles, reinforced the idea that servicewomen were not proper soldiers as they were unable to undertake all military roles and that those women who chose roles that were more combat facing, were cast as especially deviant and out of place[7].

As I argue in my 2009 article, *Effecting Discrimination[8],* by clinging to un-reflexive

claims about the nature of cohesion, and in failing to respond to societal demands as well as demands from within the Armed Forces for greater inclusion, military officials long undermined the social legitimacy of the armed forces, and put some of their own personnel at greater risk of being discriminated against, bullied or harassed. Through this they were therefore destabilizing, rather than protecting, their capabilities.

It's here that I want to come back to my earlier point about insider and outsider boundaries. I think that the MoD and military leaders fell into two major traps due to the distinctions they drew between insiders and outsiders which led them to maintain these harmful policies. I also think these ideas still pervade contemporary British military thinking and are therefore important to consider. The first is that they clung to social cohesion, the idea that operational effectiveness depends on tight-knit bonding between personnel, despite the fact that, "all of the evidence indicates that military performance depends on whether service members are committed to the same professional goals"[9], which is often called task cohesion. The British forces clung to social cohesion in part because they were, and still are, keen to differentiate themselves from the 'outside': a less cohesive and more individualistic society.

The extent to which British society lacks cohesiveness and is individualistic is complicated by its national health service, its charities, community groups, leadership role in the aid sector, and all sorts of examples that run counter to this narrative. However, this insider-outsider divide is necessary for the second trap. This is for military officials to argue that even if the evidence points to change being for the better, the military cannot experiment with change because, as a state-sanctioned organization of violence, its role is a matter of life and death; that it therefore has what military sociologist Christopher Dandeker called 'a need to be different'[10]. The problem here is not that this claim is untrue but that it can be so easily wielded by military officials – consciously or unconsciously – to ensure biases inside the military go unchallenged.

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[6] See https://www.gov.uk/government/organisations/lgbt-veterans-independent-review/about

[7] See Basham, Victoria M. 2013. *War, Identity and the Liberal State: Everyday Experiences of the Geopolitical in the Armed Forces.* Abingdon: Routledge.

[8] Basham, Victoria M. 2009. 'Effecting Discrimination: Operational Effectiveness and Harassment in the British Armed Forces', *Armed Forces and Society,* 35 (4): 728-744.

[9] Robert J. MacCoun, Elizabeth Kier, and Aaron Belkin, 2006. 'Does Social Cohesion Determine

Motivation in Combat? An Old Question with an Old Answer', *Armed Forces & Society,* 32 (4):

646-654, p.652.

[10] Dandeker, Christopher, 2000. 'On the Need to Be Different: Recent Trends in Military Culture', in *The*

British Army, Manpower and Society into the Twenty-First Century, edited by Hew Strachan, London: Frank

Cass: 173-190.

These ideas about a problematic outsider society and a different and better military culture inside also characterise what I call the defensiveness of the defence establishment. In terms of evidence, the UK Armed Forces continues to prioritise quantitative internal research where it sets the parameters of the questions being asked. Military officials frequently question or reject systematically analysed and in-depth qualitative research with military personnel conducted by outsider researchers when it questions conventional military wisdom. I and other colleagues have been told that our work is 'anecdotal' or is just 'the usual moaning of squaddies' when it is challenging. I think this comes back to the issues of loyalty to the Armed Forces that the Major I mentioned earlier expressed but also an anxiety that anything critical of the way the military functions could lead to existential crisis in the form of lesser political support and resourcing and an inability to recruit and retain personnel. The irony of this position, as I've tried to suggest, is that external critique is likely to be far less harmful to the Armed Forces than its failures to address discrimination, harassment, and bullying in its ranks which that research illuminates the reasons for.

2.3 Engendering Organizational Change: Concluding Thoughts

The final point I wish to make is that despite everything I have said to this point, military culture does contain tools for organizational change. Military personnel, as the research of scholars who prioritise their voices and experiences know, are often very smart and confident, in part due to their military training. Many of them understand the challenges that militaries face and due to the sense of loyalty that military culture engenders, they are often very articulate about their desire and the need to manage those challenges more effectively. Some have mounted legal challenges against the MoD, others have built networks within the military and with scholars outside it to explore aspects of military culture. Many of the major changes that have been made to military policy that I've discussed, whilst often represented as imposed from outside by society, would not have been possible without military personnel and members of the wider military community lobbying for change from inside.

The Armed Forces are also not monolithic. Subcultures of tolerance as well as prejudice exist within it and there have always been dissenting voices. A good example of this is in the 1996 Homosexuality Policy Assessment Team Report. Whilst this report was used to continue the banning of non-heterosexuals from the British Forces, it contains clear evidence that homophobia wasn't universal, that some personnel were unfazed by knowing that they served with non-heterosexuals, and that some did not believe operational effectiveness would be compromised by a policy change[11].

As many critical military studies scholars try to show, it is by listening to a wider range of military voices, by taking a broader range of military experiences seriously, and realising that different forms of military culture exist, that organizational change may become more plausible. I for one hope that it doesn't take another twenty years for this to be realised within the British Armed Forces or in any militaries where the points I've raised may well apply.

Thank you.

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[11] UK Ministry of Defence. 1996. *Report of the Homosexuality Policy Assessment Team.* London: TSO. Available at: https://webarchive.nationalarchives.gov.uk/ukgwa/20121026065214/http://www.mod.uk/NR/rdonlyres/C801AAED-2EFE-4D33-A845-EFD103438BF2/0/HPAT_report_Feb_1996.pdf