

MILITARY CULTURE CHANGE AND CRITICAL PARADIGMS: LEARNING FROM A NATO WORKSHOP

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Introduction

The study of military culture in NATO and partner nations surged in the 1990s. Military organizations were facing new socio-cultural challenges stemming from human rights imperatives at home and abroad. It was becoming increasingly important to address harms experienced by, and to facilitate equity for, military personnel as well as defence civilian employees. More recently, in response to a resurgence in public pressure, there have been heightened pressures for change. Military organizations are working to address sex- and gender-based violence, provide redress for atrocities committed by military members on deployments, and achieve full inclusion for historically marginalized groups in societal and military contexts. The persistence of these challenges is shared across many North Atlantic Treaty Organization (NATO) and partner nation defence and military organizations. These challenges intersect with renewed emphasis on the role of military organizations in supporting Women, Peace and Security objectives, and interconnected global development issues such as immigration, the environment, and human rights.

The observations presented in this paper draw from our learning as a result of participation at a NATO workshop (May, 2023), in Stockholm, Sweden, focused on innovative and critical approaches to studying military culture to support organizational culture change objectives. This NATO initiative was collaboratively developed and led by NATO Science and Technology Organization; the Director General Military Personnel Research and Analysis (DGMPRA), Department of National Defence; and the Mobilizing Insights in Defence and Security (MINDS)-funded Transforming Military Cultures (TMC) Network.¹

The workshop sought participation from leading academics and military experts to share and critically assess current scientific knowledge and conceptual frameworks for understanding military

¹ Portions of this paper are adapted from the NATO workshop Technical Evaluator Report (TER), written by Karen Davis, co-author of this paper. The other co-authors, Isabelle Richer (DGMPRA) and Nancy Taber (TMC), were workshop co-chairs.

culture and culture change, with a view toward the advancement of NATO and partner nations' knowledge and expertise. Contributions to the workshop were solicited (and selected) from across multiple academic and professional disciplines to identify and explore various dimensions and processes impacting military cultures; interconnections between diversity, equity, and inclusion, and military outcomes relevant to the well-being of military personnel, recruitment and retention, and operational effectiveness; root causes and prevention of systemic harms resulting from white, heterosexual, colonial, and masculine-based culture; barriers and opportunities for military culture change; and approaches to knowledge mobilization. The workshop provided an international forum to share scientific developments, innovative research approaches, critical theories, best practices for knowledge mobilization, and insights into the complexities of military cultures and practices, including systemic barriers and opportunities for culture change.

This working paper presents our discussion of the publicly available material (NATO Science & Technology Organization, 2023) from this NATO workshop, including a keynote address (Basham 2023, Keynote), 15 papers and supporting presentations,² and a post-workshop technical report (Davis, 2023). The technical report drew from this material as well as plenary and break-out group discussions which were conducted under the Chatham House Rule. We position this NATO workshop material in conversation with key contributions in the military culture literature that offer critical and alternative approaches for reprioritizing and reimagining military culture change. We discuss framing the problem and understanding resistance to change, revealing the emergence of new questions, and reinterrogating old questions resulting in recommendations for this field of study. We first set the context for the NATO workshop with respect to the field of military culture change. We then demonstrate how the workshop contributes to military culture change with its exploration of the possibilities and challenges that arise in this area.

² NATO papers and presentations are identified by the paper number they were assigned in the workshop schedule, to make clear which references in our discussion refer to the workshop, and which refer to other scholarship.

We argue that it is important to engage with the root causes of problematic military cultures through the lens of intersectionality as well as to understand the persistent nature of resistance to change partly caused by the continual focus on operational effectiveness, ideal military membership, and “buy-in.” We recommend that future research initiatives on military culture change adopt critical frameworks, theories, and methodologies. Our discussion demonstrates that the application of critical paradigms and complementary research approaches to individual, organizational, and structural factors that shape military culture can enable and sustain meaningful culture change.

Context: Military culture change

This section engages with the concept of military culture to establish the context for further discussion of the processes and phenomena which influence it. The discussion offers an overview of military cultural knowledge that emerged in the 1990s and offers insights that have developed more recently through the lens of critical perspectives and emerging paradigms. While recognizing that culture is anything but straightforward, the literature suggests that in recent decades, there has been a scholarly shift from individual to cultural explanations, preventative solutions, and responses to the wrongdoings of military actors (Mackenzie, 2023; Mackenzie & Wadham, 2023; Wadham & Connor, 2023). Interpretations of culture and the theoretical frameworks that address military culture have emerged from a variety of disciplines, many of which explore the military as a “total institution,” that is, “a world with its own unique set of norms of behaviour and dress, its own judicial system, and its own rights and responsibilities” (Whitworth, 2004, p. 158). From a total institution perspective, military experience permeates almost every aspect of the lives of its personnel. Using gender-based analyses that draw heavily on theories of hegemonic masculinity (i.e., Connell, 1995, 2005; Connell & Messerschmidt, 2005), feminist scholars have further argued that military culture is dominated by military masculinity and

traditional conceptions of male warriors, which are reinforced through enduring cultural processes (Burke, 2004; Duncanson, 2015; Whitworth, 2004).

Historically, there have also been boundaries around *who* produces knowledge about militaries and *how* that knowledge is produced – boundaries that have largely relied upon claims to the unique and privileged nature of military service and associated conceptions of insider versus outsider status and knowledge (Basham, 2023). In making this observation about positionality in her keynote address to the NATO workshop, Victoria Basham underscored the role and challenge of outsider investigation, particularly its representation of critical analysis and application of innovative research methods to the study of military culture. Indeed, adding to the complexity of insider/outsider status and positionality, the opportunity for members of military organizations to contribute to knowledge can vary significantly across military components, elements, occupations, functions, rank, and power—in a critique of colonial roots and their intersections with sexism, racism, ableism, and heteronormativity. Civilian employees also make important contributions to military mandates, and among NATO and partner nations, research increasingly considers the experience of the defence team and its members as a critical aspect of defence and military cultures (Goldenberg, et al., 2015; Thomson, 2014). This multitude of military and civilian contexts creates an over-riding culture across unique and intersecting subcultures, resulting in different manifestations and impacts across sub-groups.

Despite unique structures such as those marking military and sub-group memberships (e.g., uniforms, rank, occupation insignia), professional development (e.g., recruit, occupational and leadership training), and regulations (e.g., laws of armed service, codes of conduct, policy), military institutions have experienced various social changes that, according to some analysts, have moved the military to post-modern status (Moskos, 2000) as it has become “more democratized, liberalized, civilianized, and individualized” (Pinch, 2000, p. 156).

As a result of these changes, the divide between the military and civilian members of society has ostensibly been reduced. In spite of changes that increase military accountability and embeddedness within public institutions, including expanded opportunities for women and the inclusion of 2SLGBTQIA+ members,³ the military still claims a unique and exceptional role in defence and security. Consequently, the military as an institution continues to have a marked impact on keeping military culture distinct from civilian contexts. This uniqueness and exceptionalism include specific military structures of behaviours, values, traditions, artifacts, symbols, meaning-making, social norms, socialization processes, group memberships, relationships of power, ideology and authority,⁴ as well as regulative mechanisms such as policy and direction (Scott, 2014), and the acceptance of unlimited liability. These features profoundly impact not only how knowledge about military culture is created, but how membership in defence and military organizations is determined and experienced.

In recent decades, feminist research has demonstrated that military culture and its focus on uniformity, obedience, hierarchy, discipline, and conformity can be harmful to members due to institutional forms of sexism, racism, colonialism, heteronormativity, and ableism (Basham, 2009; Bennett, 2018; Davis, 1997, 2013; Eichler et al., 2023; George, 2020a; Koeszegi et al., 2014; Kovitz, 2000; Poulin et al., 2009; Taber, 2020; Weitz, 2015). In response, many NATO and partner military organizations have implemented initiatives to address systemic misconduct in garrison and while deployed on multinational and culturally diverse operations, such as harassment, bullying, discrimination, racism, extremist/hateful conduct, and sexual assault. In spite of some successes, the devastating effects of harmful and inappropriate behaviours on individual health and wellbeing, team cohesion, attrition of highly trained personnel, operational effectiveness, and public trust in military institutions are persistent.

³ Two-spirit, lesbian, gay, bisexual, trans, queer, questioning, intersex and asexual.

⁴ Description adapted from analysis of perspectives on military culture in Baldwin, et al., (2006). *Redefining Culture: Perspectives Across the Disciplines*. Lawrence Erlbaum Associates Publishers.

Given these challenges, this paper reinforces the importance of a continued interrogation and transformation of military culture, particularly the relevance of critical paradigms in privileging different positionalities and perspectives to facilitate structural change.

Understanding the problem: Root causes and intersectionality

The discussion in this section argues that moving from a focus on problematic individual behaviours to a focus on structural inequity within military culture and an intersectional understanding of privilege and oppression is key to working toward military culture change. Emphasizing the importance of identifying these root causes, the paper presented by Maya Eichler, Tammy George, and Nancy Taber (2023a Paper #5) proposes an anti-oppression framework that names patriarchy, settler-colonialism, white supremacy, heteronormativity, and ableism as interlocking structures that result in both individual discriminatory actions and systemic inequalities. This framework interrogates intersectional power imbalances to challenge social and historical inequities in institutions with policies and practices that allow certain groups to be advantaged, resulting in domination over others. In order to engage in military culture change, Eichler, George, and Taber argue it is necessary to address the legacy of the root causes and intersecting structures as they have shaped military culture, and to problematize how a specific warrior ideal of military membership continues to be privileged, with a valuation of masculinized combat over feminized support (see also, Breede & Davis, 2020; Eichler et al., 2023b; Davis, 2013; Taber, 2020, 2022). The language of critical frameworks, including critical race theory with its problematization of white privilege, can be uncomfortable for many (particularly those in privileged positions); this discomfort must be engaged with in order to challenge and eliminate the “willful blindness” of individuals and organizations that can inhibit critical conversations about intersectional harm (Baker et al., 2016; Callaghan, 2020). The concept of “whiteness” and its supporting systems of privilege are central to understanding experiences of discrimination and racism (George, 2020a, 2020b).

Theories of intersectionality are a vital tool for understanding how inequities are outcomes of “intersections of different social locations, power relations, and experiences” (Hankivsky, 2014 p. 2), with particular relevance to researchers and policy makers that underscores the importance of considering one’s “own social position, role, and power” (Hankivsky, 2014 p. 3; Richer et al., 2023 Paper #7). Intersectionality recognizes that people can experience privilege and oppression simultaneously, and these experiences are further understood depending on the situation and context in which people find themselves (Hankivsky, 2014). However, intersectionality is too often positioned as meaning “everyone is different” or “everyone is intersectional”; unfortunately, this individual perspective on intersectionality risks institutional strategies overlooking the ways in which structural systems have historically, culturally, ideologically, and institutionally privileged certain groups while marginalizing others (Sensoy & DiAngelo, 2017), another form of willful blindness.

In addressing their own privilege and positionality in knowledge creation, researchers and decision-makers working in the area of military culture change should continuously examine their own roles in reinforcing assumptions regarding marginalization, privilege, and their connection to whiteness. This is particularly important with respect to how objectives of inclusion and belonging are framed within existing dominant white systems. These objectives can problematically suggest that the goal is for equity-deserving (and equity-denied) members to be included with, and to belong to, the culture of the dominant white centre, rather than being empowered to contribute to the transformation of a harmful culture. Institutional interpretations and engagements with the concept of intersectionality risk becoming co-opted as accommodation tools to address multiple individual intersections, rather than critical conceptual tools that interrogate the problematic institutionalization of white colonial norms. In the military, the individualized use of intersectionality can reinforce assumptions about the need for homogenous military identities that purportedly support teamwork and operational effectiveness.

Papers presented at the NATO workshop highlight that, increasingly, culture change objectives in defence contexts include aspirations for one integrated defence team, which includes both civilian and military members (Connelly, 2023 Paper #4; Goldenberg & Febbraro, 2023 Paper #3), as well as strategies for the integration of Regular and Reserve forces to meet military objectives (Connelly, 2023 Paper #4). In each case, there are resultant implications for relationships at the individual and workplace level. Regarding the former, the paper presented by Irina Goldenberg and Angela Febbraro detailing a study that included the defence organizations of 11 NATO nations, suggests concerns regarding inequity among military and civilian members (Goldenberg & Febbraro, 2023 Paper #3). Vincent Connelly's (2023 Paper #4) analysis of Regular/Reserve force relationships notes the Regular force derogation of part-time Reservists as "civilians in uniform."

Samantha Cromptvoets argues that, in the Australian context, in spite of culture change efforts focused on sexual misconduct and gender integration, a change to the Australian Defence Act in 2015 that allowed part-time service in the Regular Force represented the most significant attempt to achieve a total force in the Australian Defence Force's history. Although there was resistance to this change, according to Cromptvoets, it addressed inequity in that it "wasn't about reducing the liability to serve but rather establishing the flexibility to serve in different and valued ways" (Cromptvoets, 2021, p. 61). This example raises multiple questions regarding the culture change and relationships among military and civilian as well as Regular and Reserve military and defence organizations, including how structures and legislation impact workplace relationships and outcomes.

The available research on defence team relationships provides an example of the assumptions generated through analytical focus on individual influences, with relatively limited analysis of the broader structural influences of defence and military cultures on the experiences of its personnel.

Analysis of individual influences, for example, considers the extent to which greater integration of civilians, Veterans, and equity-deserving groups across the military may contribute to the greater inclusion that defence organizations aspire to. Although further inclusivity among civilians, Veterans, and equity-deserving military personnel may foster connections across the military-civilian divide, we cannot assume that it will necessarily result in challenging military values and social norms that privilege certain members over others (both in policy and in practice), unless the ways in which they are included are supported by a critical intersectional lens to culture change that critiques forms of privilege and marginalization (Eichler et al., 2023b). A critical intersectional lens, as argued in this section, would shift the focus from individual change to structural transformation aimed at the root causes of military cultural inequities, and an intersectional understanding of privilege and oppression.

Resistance to change: Operational effectiveness, military identity, and “buy-in”

Resistance to change is a recurring theme in military culture change discussions, including a notable body of research that has addressed the roles and inclusion of women, 2SLGBTQQIA+, and racialized people in the militaries of NATO and partner nations (Davis et al., 2021). This section focuses on three significant sources of resistance: operational effectiveness, the notion of an ideal military member, and “buy-in.”

In the context of the Canadian military, although the term “operational effectiveness” is commonly used in a variety of contexts (orders, regulations, policies, and other institutional documents), it is not well-defined. In the past, the need for operational effectiveness was used to justify a cultural status quo with respect to the exclusion of women and 2SLGBTQQIA+ members, arguing that their presence would decrease unit cohesiveness, an assumption which has since been decisively challenged (Frank et al., 2010; Okros & Scott, 2015; Symons, 1990; Taber, 2020; Winslow & Dunn, 2002).

In recent years, operational effectiveness has been leveraged to argue culture change in the military is required, and is increasingly featured in military ethos documents, such as the Canadian Armed Forces' ethos, *Trusted to Serve* (see Taber, 2022).

However, the calls for diversity to support operational effectiveness have unfolded in two problematic ways: first, by promoting how diversity—in the form of the inclusion of visible minorities, Indigenous people, 2SLGBTQQIA+, and women in the military—will enhance operational effectiveness, and second, by highlighting how gender-based violence inhibits operational effectiveness. A recent RAND study posited, for example, that there are significant opportunities for leveraging workforce diversity to enhance military effectiveness across a wide spectrum of defence activity which cumulatively position diversity as a strategic enabler for the UK and US Armed Forces (Slapakova et al., 2022). These claims to diversity and operational effectiveness have also addressed commitments to international operations through, for example, the NATO Allied Command Transformation which identifies the need to overcome cultural differences (Waruszynski, 2023 Paper #9). The United Nations (UN) Women, Peace and Security (WPS) agenda was initiated in 2000 with the adoption of UN Security Council Resolution (SCR) 1325. UN SCR 1325 calls for increase in the participation of women, including police and military women, to improve the outcomes of peace support operations (PSOs), and ultimately contribute to durable and lasting peace (UN Women, 2015). Numerous WPS resolutions have followed and, in 2009, NATO initiated supporting directives and an action (NATO/EAPC, n.d.). Yet, assumptions regarding the intersections of military culture, operational effectiveness, and expectations for women to enhance military outcomes in PSOs have been challenged (Baldwin & Taylor, 2020; Karim & Beardsley, 2013).

In the last decade in particular, military organizations have highlighted how sexual misconduct inhibits operational effectiveness (e.g., Operation HONOUR, Defence Administrative Order and Directive [DAOD] 9005-1 on sexual misconduct).

The 2015 NATO report, “UNSCR 1325 Reload,” published in collaboration with Universidad Rey Juan Carlos, the Australian Human Rights Commission, and the Australian Defence Force, included gender-based harassment and violence as one of five key principles to address in supporting the participation of women in the military. As asserted in the report, “gender-based harassment and violence ruins lives, divides teams and damages operational effectiveness” (NATO, 2015 p. 36). However, at the same time that such strategy calls for sexual misconduct to stop, the concurrent focus on operational effectiveness and ensuring the commitment and performance of all members risks undermining the need to focus on engaging with people who are experiencing harm. From a critical culture change perspective, this raises questions regarding the political will of the organization to empower meaningful change. The bottom line, asserted in the NATO workshop discussions, is the moral obligation to ensure that every citizen has a right to serve without harm from within; however, it is not as clear whether that conviction is enough to influence substantive and lasting change as it competes with human resources justifications that prioritize operational effectiveness, such as the imperative of recruiting sufficient numbers to fill vacant positions. Furthermore, the focus on operational effectiveness raises critical questions regarding the extent to which conceptions of the ideal military member remain largely unchanged.

In the Canadian Armed Forces (CAF), the DAOD 5023-0 Universality of Service policy and the soldier-first principle requires that all members be, with few exceptions, physically and mentally fit and able to be deployed operationally (see Taber & Shoemaker, 2024). This policy and principle privilege white male cisgender able-bodied members, who are perceived to be ideal military members (Davis, 2013) based on a valuation of masculinized operational experience (Eichler et al., 2023b; Taber, 2022). Those who can emulate this ideal are more likely to be promoted into the senior, general, and flag officer ranks, resulting in decreased diversity at the top of the military hierarchy.

Though there have been recent efforts to expand conceptions regarding who may be viewed as an ideal member (e.g., the new CAF ethos, Trusted to Serve, in relation to more inclusive uniform regulations and the use of “fighting spirit” in place of “warrior”; see Taber, 2022), the entrenched notion of an ideal military member is remarkably resistant to change. For instance, while it has been suggested that the introduction of cyber warriors and unmanned aerial vehicle (UAV) operators to the military is likely to disrupt conceptions regarding traditional military identity, it has also been suggested that any associated changes to expectations regarding, for example, fitness standards and universality of service, will be viewed as problematic (Okros, 2023a).

In his contribution to the NATO workshop, Alan Okros (2023b Paper #1) posits four phenomena important to military identity that may have impacts on (re)defining the masculine, combat characteristics of the warrior: (1) greater reliance on the military for response to domestic challenges; (2) challenges to hegemonic (masculine-centric) systems; (3) UN and NATO priority for military forces in prevention and protection roles; and, (4) increased use of automated systems and the role of hybrid warfare and cyberwarriors in the virtual battlespace. It remains to be seen whether these shifts demonstrate a rethinking of operational effectiveness and ideal military membership. In his workshop paper, Walter Callaghan (2023 Paper #12) discusses how tradition and ritual play an important role in connecting individual identities to sub-groups, and sub-groups to the institution. As they inherently resist change and can reproduce systems of harm, rituals are critical regulators and shapers of ideal military identities. In many cases, these rituals are sexist, homophobic, colonial, and racist. Callaghan’s analysis raises questions regarding how the creation and maintenance of military identity contributes to the construction of exceptionalism within the military, in that rituals intended to mark the individual as having achieved elite or special status contribute to a problematic affirmation of group members as belonging to a unique and privileged culture.

This heightens the perceived superiority of the group and risks minimizing the culpability of the home organization or sub-culture. Such resistance to critique and change links to the idea of “buy-in,” in that the focus is on placating, even rewarding, members who fit into a military ideal.

The workshop paper presented by Eichler et al. (2023a Paper #5) problematizes “buy-in,” exploring how military leaders are often concerned with making culture change palatable to those who resist such change, typically those whose embodiment is privileged. Leaders argue that “buy-in” is necessary for members to accept culture change, without an acknowledgement that the notion of “buy-in” itself functions to inhibit change. This perspective tends to promote less critical language and creates barriers to meaningful change, privileging those who hold and control power by centring their perspectives in any discussions of culture change. Not having to engage in dialogue considered to be challenging and uncomfortable, while others live with challenging and uncomfortable circumstances, is a form of privilege and reinforces resistance to change, which has the effect of consolidating how power operates within the institution. It is worth asking, then, how “buy-in” privileges the role of top-down leadership in change processes. How does it aim to mitigate perceived risks of empowering marginalized members to take an active role in change?

Existing gaps in understanding how resistance works to sustain cultural processes may not be strictly accidental; whether conscious or unconscious, institutions make choices to repeatedly ask some questions and not others. As illustrated in the NATO workshop paper presented by Lene Ekhaugen, Torunn Laugen Haaland and Tom Erik Selstad, the Norwegian military response to three disparate challenges, including experiences of sexual misconduct and operational errors resulting in damage to equipment, the military cultural tendency is to “press on” in spite of lack of sufficient knowledge, procedures, and resources.

This approach tempers change and diverts in the “right” (read, operationally effective) direction as determined by those making the decision to “press on” (Ekhaugen et al., 2023 Paper #13). Such responses to change imperatives can also result in positioning marginalized members as scapegoats, that is, as the cause for the so-called disruption of current culture.

Recommendations for research: Critical, transformative, and trauma informed

Noting that military cultures are not static and are conditioned to survive, it is important to explore how military culture does adapt to change, but in ways that serve to protect the status quo and do not always align with formally communicated change objectives. This section focuses on the importance of research that employs critical frameworks, theories, and methodologies to analyze how lived experiences intersect with military culture on a structural level. The workshop papers and the articles reviewed here reinforce the imperative of applying critical, transformational, and trauma informed paradigms and approaches to access lived experience. Although these paradigms and approaches are not new, they have largely been neglected in the development of knowledge generated to address challenges within military culture. As argued in this section, they offer opportunities to better understand the impacts of institutional systems on individuals, critically examine assumptions and implications about the military as an isolated, “total institution,” and re-examine the relationship of the military to government and to society (Davis, 2023).

Critical social theories and approaches—such as anti-colonial approaches, critical race theory, anti-racist feminist theories, and queer theories—provide key perspectives regarding how military organizations maintain complex social inequalities that are experienced through the intersections of gender, race, sexual orientation, and class identities (see Eichler et al., 2023a, 2023b).

These theories enable a critical analysis of the structural sources of oppression, power dynamics, and marginalization on the basis of intersecting identity facets. Critical social theories also provide an analytical framework to describe and understand hegemonic systems and their influence on the lived experience of members. In conjunction with critical theories and paradigms, researchers need to push methodological boundaries to examine the areas traditional methodologies have been unable to address. Methodologies such as institutional ethnography illustrate how power relations create and reinforce hegemonic dynamics within lived experience and institutional structures (Taber, 2010).

The workshop paper co-authored by Isabelle Richer, Angela Febbraro, Victoria Tait-Signal, and Justin Wright (Richer et al., 2023 Paper #7) reinforces the importance of anti-oppressive perspectives, critical social theories, intersectional analyses of complex inequalities, methodological approaches adapted to the complexity of the phenomenon, transformational methodology, and mixed methods. The adoption of paradigms relevant to the lived experience of those participants/partners that researchers seek to empower, along with complementary methodologies, facilitates visibility of the widespread practices that create and perpetuate dominant structures, processes, relationships, and ways of knowing (Richer et al., 2023 Paper #7). Callaghan's (2023, Paper #12) analysis of member experience with ritual and religion in a military subculture, for example, demonstrates how anthropological paradigms reveal the impacts of rituals on sustaining culture, including those practices that exclude and harm some, just as they promote cohesion and identity for others. The adoption of research approaches that partner with critical frameworks, such as participatory action research (PAR) and community-based research (CBR) (Reid et al., 2017), also present opportunities for contributions to change through the establishment of meaningful relationships with the very communities that the research seeks to understand and empower (Richer et al., 2023 Paper #7).

While critical paradigms can include interpretive and positivist research that can be both qualitative and quantitative, many initiatives aiming to address socio-cultural issues have relied upon strategies targeting individual-level factors without critical examination of the social dimensions that influence cultural practices and conduct in military organizations. Disaggregating data by identity markers, for example, makes important contributions to considerations of intersectional experience; however, knowledge development through analysis and interpretation can be hindered by limited access to data on lived experiences in a military context, including experiences based on race, ethnicity, Indigeneity, 2SLGBTQQA+ identities, and ability. This limitation underscores the importance of alternative approaches to research that explore practices of racialization and gendering as they are produced institutionally (George, 2020b). Furthermore, military organizations have tended to focus research efforts on symptoms of individual misconduct (Davis, 2022), using a positivist paradigm that assumes that researchers and the research process are objective and neutral (Davis & Eichler, in press; Lincoln & Guba, 2000, as cited in Richer et al., 2023 Paper #7).

The negative impacts of masculine culture and its associated warrior identities have become more evident in recent years, including through focus on sexual misconduct and gender-based violence (Basham, 2009; Koeszegi et al., 2014; Weitz, 2015; Wilson, 2023 Paper #11), operational exposures (Fox & Pease, 2012), and institutional betrayal and culturogenic harm (Shields et al., 2023 Paper #2). Focus on these experiences has yielded insight into the vulnerabilities of masculinity (Shields et al., 2023 Paper #2; Whelan & Eichler, 2022), yet it is less clear how the creation of this knowledge across disciplinary perspectives (e.g., medical, social science) can offer complementary solutions, and to what extent these solutions might contribute to mitigating the impact of culture on individual harm and promoting culture change.

For example, recognition, treatment, and research among men with PTSD (Shields et al., 2023 Paper #2), and research on the experience of women affected by sexual misconduct (Imre-Millei et al., 2023 Paper #8), have resulted in greater visibility of the harm to, and needs of, members. Yet, as discussed at the workshop, there can be unintended negative impacts on members when there is a lack of action toward creating greater compassion within military culture (Wilson, 2023 Paper #11). This problematizes the diagnosis-oriented model that dominates mental health discourse, including the focus on PTSD. As summarized in the paper submitted to the workshop by Duncan M. Shields, Jesse Frender, Paul Nakhla, and David R. Kuhl (2023 Paper #2), mission first cultural discourse, and associated privileging of hegemonic masculinity as a key contributor to operational effectiveness, complicates the experience of harmed members and Veterans, their relationships with their peers, and the meaning given to their service. That is, diagnoses of PTSD and experiences of sexual misconduct undermine conceptions of masculinity assumed critical to operational effectiveness, thereby contributing to further separation between experiences of vulnerability and harm and conceptions of who is a worthy member, rather than recognizing and validating vulnerability as a component of masculinity, military culture, and belonging.

Recognizing that experiences of harm can be concealed from view, Margaret McKinnon, Linna Tam-Seto, and Bibi Imre-Mille (2023 Paper #11) asserted in their workshop paper that researchers have a responsibility to ensure the inclusion of trauma-informed approaches in all research design and implementation. This responsibility includes understanding the harm that has resulted from how others have problematically responded to their experiences in the past, and recognizing the emotional cost for some to participate in research, including the researchers themselves. The participation of both women and men in research studies, including within the context of other relevant identities and experiences (e.g., race, ability, rank, Regular/Reserve status, military/civilian status), is an essential consideration in trauma-informed approaches.

Indigenous methodologies and storytelling provide particularly powerful examples of alternative research approaches that create space for the emergence of new knowledge through lived experience and different “ways of knowing” (Richer et al., 2023 Paper #7). Such approaches can contribute to understanding not only how individuals negotiate structures and relationships, but to identify how assumptions such as merit and equality are undermined within these dynamics (Castilla & Benard, 2018). Indigenous approaches to research engage Indigenous knowledge, worldviews, ways of knowing and learning, and lived experiences situated within Indigenous cultures, all of which are in conversation with unique values, ethics, and axiology (Kovach, 2021). As described by Indigenous scholar Margaret Kovach (2021), axiology can be referred to as ethics and values interpreted through different theories and worldviews. Indigenous axiology is woven into relationships with other people and relationships with the natural environment, and provides an essential foundation for research that will impact Indigenous peoples. Those values and processes that require particular attention within Indigenous research paradigms include reciprocity, respect for the relevance of community protocols, and contributions from Indigenous perspectives and knowledge (Government of Canada, 2022; Reid et al., 2017). Ways of knowing are unique to different identities and take into account that knowledge perspectives are subjective, constructed through lived experience, and shaped by historical, cultural, race and gender-based experiences and influences (Belenky et al., 1986; Richer et al., 2023 Paper #7).

Participatory action research (PAR), as the name suggests, is a research methodology that requires the participation and action of the people that will be impacted by the research (Reid et al., 2017). When partnered with critical paradigms, it can be designed to identify assumptions and practices that contribute to a range of marginalized experiences, including those that cause fear and discomfort surrounding change. It can also provide opportunities for dialogue to explore, for example, the interconnections of language

and practices within group contexts.

From this perspective, change work does not focus on getting “buy-in,” but on meeting people where they are to introduce and guide change driven by participant engagement at local levels.

As suggested by Amber Spijkers, Anke Snoek, Bert Molewijk and Eva van Baarle in their workshop paper (2023 Paper #6), the application of PAR can be an impactful model for change within the military by, enabling greater gender inclusion through the engagement of women and men in military units, to name only one example. PAR can also mediate top-down approaches that risk misalignment with the experience of members. Given its access to everyday experience as well as its applicability, it is critical to determine how PAR can be used within defence and military contexts to facilitate learning from lived experience. Arguably, PAR could accommodate spaces for difficult, yet candid conversations that lead to new understandings across intersectional identities (e.g., men, women, 2SLBTQQIA+, and racialized members); such dialogic space can enable significant change (Baker et al., 2016; Davis & Eichler, in press; Eichler & Wiebe, 2019; Maroist & Clermone-Dion, 2022). The challenge, however, is that PAR requires significant participant commitment and leadership endorsement, more than some are prepared or able to give. It also presents barriers that need to be carefully considered within research designs, including the mitigation of harm for those who may not feel safe discussing experiences within their workplace (Spijkers et al., 2023 Paper #6).

The importance of conducting research in accordance with ethical guidelines to protect participants, respect the value of human dignity, and ensure free and informed consent is not new.

Nevertheless, it is worth emphasizing that these practices are essential for creating and maintaining the trust of research participants in the research process, particularly in military and defence contexts. The alternative approaches to research discussed here further demonstrate the interdependency and shifting power relationships between researchers and research participants, thereby

placing a particular premium on respect and trust.

Collaborations across research and stakeholder communities to facilitate the development of qualitative transformational research strategies, results, and implementations are also essential to support culture change. Knowledge partnerships, often captured within integrated knowledge translation paradigms, are important contributors to the co-creation of knowledge (Reid et al., 2017). This suggests that research communities, which have traditionally held disproportionate power in the creation of knowledge, must develop strategies for comprehensive, inclusive approaches to knowledge creation that engage internal and external stakeholders across military and defence networks (Davis & Eichler, in press).

To achieve a full understanding of military culture, it is also important to factor in social and political spaces when conceptualizing research. In spite of our increasingly digitized and virtual worlds, research that addresses these contexts is limited. Through analysis that explores the advantages and disadvantages of digitization on organizational, social, and change efficiencies within the context of the Bundeswehr, Martin Elbe and Gregor Richter (2023 Paper #14) establish a relationship between digitization and the transformation of organizational culture toward a learning culture. The national frameworks within which military culture operates are also relevant. Notably, while the boundaries between the military and society, and between our face-to-face and virtual worlds, have become increasingly permeable in recent decades, a re-examination of the concept of the military as a “total institution” is required to understand the changing relationships between the military, the national government, and society. Given the relationship between the military and the society to which it is accountable, it is important to expand the investigation of culture change challenges such as sexual misconduct to the lens of civil-military relations (CMR) (Johnstone & Tait-Signal, 2023). However, Rachael Johnstone and Victoria Tait-Signal suggest that CMR also

needs to be “reimagined” to account for key military cultural challenges, including evolving considerations of race, gender, and sexual violence. This should include analysis of the roles of political ideology and social media as they influence member and military responses to culture change (Davis, 2023), particularly with respect to disinformation and resistance. Regardless of the extent to which the military is influenced by political ideology and social media, and bounded by civilian political direction and oversight, the military is apolitical agent in that it actively contributes to the reproduction of national values through multiple levels and types of engagement. The relationship between the military and political ideology underscores the importance of considering the historical role of the military in building a colonial nation, and its connection to current and future nation-building and culture change (Davis, 2022).

The discipline of critical military studies (CMS) provides opportunities to ask new questions about gender and its relationship to military institutions and the environments within which they operate. Victoria Basham and Sarah Bulmer (2017) suggest that a CMS approach challenges feminists to interrogate the limits of established feminist concepts such as “militarised masculinity”; that is, as feminists continue to recognize the ways that gender relations are constituted contextually and intersectionally, encompassing particular geographical spaces, times and communities, it is also important to continue to question the relationship between feminism and the military (Basham & Bulmer, 2017). This relationship has become salient as NATO and its member nations respond to United Nations Security Council Resolution 1325, and the subsequent UNSCRs that comprise the UN Women, Peace and Security agenda. Just as some feminist scholars are sceptical of the potential for militaries to shift away from hegemonic militarised masculinities, even as they take on WPS challenges, others suggest that there is potential for the regendering of military culture (Duncanson & Woodward, 2016; Johnstone & Momani, 2022; Tait, 2020) particularly through the facilitation of feminist visions of security when militaries deploy on peace support operations (Bastick & Duncanson, 2018). Similarly, in

their workshop paper, Chiara Ruffa and Annick Wibben (2023 Paper #10) suggest critical examination of change within the context of the WPS agenda and its associated feminist norms. Emphasizing the non-linear nature of how norms travel, their analysis underscores outstanding questions regarding the role of change agents, how norms are exported both within and outside of the military, and how they are negotiated by local actors in deployment contexts.

The lived experience of military members is far from static, as individuals transition in and out of subcultures that have unique social hierarchies, underscored by assumptions about elitism and the importance of positional and social power. For example, in her workshop paper exploring student experiences in the context of a military learning institution for mid-career officers, Vanessa Brown (2023 Paper #15) highlights the various social hierarchies at play that reflect the larger military organization. Her analysis of the experiences of students reveals the way in which members actively (re)construct military identity and culture in their daily activities in the learning environment. Notably, the ways in which military identity is (re)constructed rely on differences between varied contexts. The experience of new members as they move through training and education phases, including recruit training, military colleges and occupational training, followed by assignment to their first military unit, has typically been investigated as an experience of socialization. Research approaches that consider these liminal and transitional experiences, including within military education and training phases, have the potential to contribute to a fuller understanding of the opportunities for and barriers to change that impact military culture and members.

Conclusion

Our observations from the NATO workshop materials demonstrate the power and imperative of critical, transformative, and trauma-informed research approaches in advancing understandings of military culture to support culture change. Such critical approaches reinforce the importance of naming structures and sources of oppression to generate meaningful change, as well as identify and navigate resistance to that change. This discussion prioritized the search for root causes of systemic harm and the central role of intersectional experience in understanding the cultural embeddedness of the systems in question. Recognizing that military cultures and subcultures have demonstrated their ability to adapt and survive, our discussion engaged three key concepts to help us understand resistance to social change in military contexts: operational effectiveness, military identity, and “buy-in.” From these discussions, we arrived at several recommendations for critical, transformative, and trauma informed research on culture change, including the application of methodologies and research designs which engage stakeholder communities who have experienced marginalization and harm, and those who will be impacted by the research.

We suggest that engagement with critical paradigms to address individual, organizational, and structural factors shaping the dynamics of military culture is critical for culture change. Within the context of CAF challenges, there is an increasing imperative to engage impacted communities in the conception and design of research, and to translate research knowledge into action in partnership with stakeholders for optimal impact. As military organizations move forward to transform the experiences of their members, they need to strengthen knowledge and capability across policy and research communities in partnership with those who will be impacted by the research and the knowledge that these processes create and embed within military culture.

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