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**Cultural Interoperability:**  
Applying Social Categorization to Better Understand and Mitigate Cultural Friction in  
Multinational Operations

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**Human Dimension Capabilities Development Task Force  
Capabilities Development Integration Directorate  
Mission Command Center of Excellence (MC CoE)**



# Cultural Interoperability

## Applying Social Categorization to Better Understand and Mitigate Cultural Friction in Multinational Operations

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## Executive Summary

As the Army prepares for future conflicts, it has become increasingly apparent that the United States is unlikely to enter into future conflicts unilaterally. Nearly all of the major military operations in which the United States has participated during the last three decades have been undertaken as part of an international coalition or alliance. This trend is likely to continue into the future, with one unique change. Where coalitions in the past were largely symmetrical in partner capability, future partnerships are likely to be characterized by a degree of asymmetry, with one nation's military needing the capability to advise and train another nation's developing military force. A critical challenge facing multinational partnerships in the current and future operational environment is *cultural interoperability*. Uncertainty as a consequence of cultural difference naturally accompanies multinational commands and multinational forces, in both symmetrical (traditional) and asymmetrical (contemporary) partnerships. In order to work effectively in these circumstances and successfully implement Mission Command, the Army should work to actively address the unique challenges of cultural interoperability associated with working in multinational commands.

This white paper proposes that the Army use *social categorization* to help predict potential friction points during multinational operations. It involves identifying social categories which serve to simplify, structure, and regulate our understandings of and interactions with other people. Social categorization is a mechanism that may help the U.S. Army and its partners prepare for working more effectively within multinational commands, while simultaneously reducing the increased cognitive strain that accompanies working in an intercultural environment.

In order to identify the similarities and differences that can cause potential cultural friction points, social psychologists have identified various sets of value-based dimensions that exist across cultures. The most established effort of this kind is by Geert Hofstede. This white paper presents his national and organizational dimensions of culture as a potential framework for developing a military-centric cultural baseline for both the U.S. Army and any anticipated partner organizations. By developing this cultural baseline, the U.S. Army and its partners will be able to begin understanding, anticipating, and preparing for potential intercultural friction points which may impede interoperability.

Importantly, social categorization also has the potential to create negative and even harmful second and third order effects. The nature of creating social categories intrinsically leads to in-group and out-group distinctions. This paper will discuss the biases, stereotypes, and prejudices that are associated with the creation of in-group and out-group identities, as well as potential organizational methods for mitigating the negative consequences of social categorization. Such strategies include: (1) the *decategorizing* of groups through personalization; (2) *recategorizing* them through superordinate goals; (3) *subcategorizing* them using shared goals but distinct roles; 4) and finding an *optimal distinction* between creating a new shared identity and maintaining the unique original identity. While each mitigation strategy may achieve its desired

outcome, they also inevitably present their own challenges and shortcomings. Many times the decision to use one strategy over another will depend on specific situational factors.

This white paper closes by making several recommendations for consideration that have the potential to better prepare U.S. Soldiers and their international partners for multinational operations, and assuaging any negative second and third order effects of social categorization. These recommendations include:

- Develop and validate an assessment tool based upon Hofstede's dimensions of national and organizational culture (or a similar set of dimensions).
- Conduct a pilot study using a small number of international partners in order to identify how this information can be used to assist in the preparation of, and planning by, all partners
- Conduct experimentation to identify the technique, or techniques (decategorization, recategorization, subcategorization, or optimal distinctiveness) best suited for combating the second and third order effects of social categorization in a military context.
- Develop new or promote existing curricula, aimed at teaching leaders and soldiers to mitigate individual cultural biases, as well as how to create an environment which mitigates biases and prejudices through multiculturalism.
- Create an initiative or organization, that can provide a social science expertise, in an advisory capacity, to units while they are training stateside and while deployed overseas.

*“War is the realm of uncertainty; three quarters of the factors on which action in war is based are wrapped in a fog of greater or lesser uncertainty. A sensitive and discriminating judgment is called for; a skilled intelligence to scent out the truth.”*

Carl von Clausewitz

## Introduction

The theoretical foundation driving this white paper is the *Uncertainty Reduction Theory*, developed by Charles Berger and Richard Calabrese. This theory asserts that, when interacting and communicating, individuals need information about the other actors in order to reduce their uncertainty with the situation.<sup>1</sup> After gaining information about the other party, individuals are then able to begin predicting the others behavior and actions.

Conflict, by its very nature, is an uncertain event; and militaries throughout history have endeavored to anticipate and reduce the fog of war. Despite advances in technology, military operations continue to be shrouded in uncertainty. The operational environment of the future is projected to be increasingly complex and ambiguous.<sup>2</sup> As the Army prepares for future conflicts, it has become increasingly apparent that the United States is unlikely to enter into future conflicts unilaterally. Nearly all of the major military operations in which the United States has participated during the last three decades have been undertaken as part of an international coalition, or alliance. This trend is likely to continue into the future, with one unique change. Where coalitions in the past were largely symmetrical in partner capability, future partnerships are more likely to be characterized by a degree of asymmetry, with one nation’s military focused primarily on the ability to advise and train another.

According to NATO’s Multinational Interoperability Council, the “future coalition operational environment must be one in which interoperability has been contemplated and addressed well in advance.”<sup>3</sup> To be effective, “coalition forces must improve the speed and quality of decision

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<sup>1</sup>Berger, Charles, and Richard Calabrese, “Some Exploration in Initial Interaction and Beyond: Toward a Developmental Theory of Communication,” *Human Communication Research* 1, no. 2 (1975): 99–112.

<sup>2</sup> Department Of the Army, *The U.S. Army Operating Concept: Win In A Complex World*, 10-15.

<sup>3</sup> Multinational Interoperability Council (MIC), *Multinational Interoperability Council (MIC) Coalition Building Guide: Future Coalition Operating Environment: Interoperability Challenges for the Future*, November 7, 2012, Multinational Interoperability Council, Concept Development and Experimentation (CD&E) Multinational Interoperability Working Group (MIWG), 5.

making and enhance their unity of effort, while acting on a high level of flexibility.”<sup>4</sup> NATO defines interoperability as “The ability of systems, units or forces to provide services to and accept services from other systems, units or forces and to use these services so exchanged to enable them to operate effectively together.”<sup>5</sup> Interoperability challenges are typically described as falling within the realm of: policies, procedures, facilities, capabilities, doctrine, logistics, and communications systems and their associated technologies.<sup>6</sup>

This white paper nominates an additional challenge facing multinational partnerships in the current and future operational environment: cultural interoperability. Uncertainty as a consequence of cultural difference naturally accompanies multinational commands and multinational forces, in both symmetrical (traditional) and asymmetrical (contemporary) partnerships. The U.S. Army acknowledges that interoperability is critical to its future success. As a result, it is a crucial component of its leader development strategy, stating “leaders must be proficient in a variety of situations against myriad threats and with a diverse set of national, allied, and indigenous partners.”<sup>7</sup> If “officers [and leaders], at all echelons, are developed to understand and practice the mission command philosophy in order to execute unified land operations in Joint, Interagency, Intergovernmental, and Multinational (JIIM) environments,” then the Army should be working to address cultural interoperability.<sup>8</sup>

This white paper will look into how social categorization can help mitigate cultural uncertainty within multinational commands. Social categorization characterizes the extent to which two or more groups are seen as distinct, and reduces the uncertainty involved in cross-cultural interactions. In short, this paper will discuss how social categorization can address the problems proposed by the uncertainty reduction theory. An essential component of this discussion is a review of the potentially negative second and third order consequences that accompany social categorization.

### The shift to Mission Command and Decentralization

The Army’s shift from centralized command and control towards the decentralization of the philosophy of mission command remains at the heart of the present study. This is critical to keep in mind throughout this white paper. Many of the cultural dimensions that the paper

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<sup>4</sup> Multinational Interoperability Council (MIC), “MIC Coalition Building Guide,” 5.

<sup>5</sup> Codner, Michael, “Hanging Together: Interoperability within the Alliance and with Coalition Partners in an Era of Technological Innovation,” June, 1999, NATO Research Fellowship, Royal United Services Institute for Defense Studies. 3.

<sup>6</sup> Multinational Interoperability Council (MIC), “MIC Coalition Building Guide,” 6-7, 21-22.

<sup>7</sup> Department of the Army. Army Leadership Development Strategy (ALDS): Training, Education, Experience. 2013. Page 5.

<sup>8</sup> *Ibid.*, 13.

discusses, such as power distance and uncertainty avoidance, are important aspects to consider in order to successfully implement mission command in a multinational setting.

The aspects of decentralization and empowerment of subordinates, which are central to mission command, are based upon the six principles listed in Figure 1.<sup>9</sup> It is important to remember that each

specific principle is not an island; rather, they represent building blocks. Accomplishing each successive principle is dependent upon accomplishing its predecessor. Arguably, developing cohesive teams through mutual trust is the most important principle, which represents the foundation of the philosophy of mission command.

The concept of trust can fundamentally influence the success or failure of multinational operations. Trust can be developed through understanding as a result of preparation, training and interaction. Conversely, trust can be lost by perpetuating harmful stereotypes and by failing to properly prepare and train for cross-cultural interaction. This study discusses how the concept of social categorization can help develop an understanding of the differences and similarities between partner nations. Increased cross-cultural understanding can potentially mitigate uncertainty and foster trust between multinational partners. Importantly, however, it also has the potential to inhibit trust if the categorization is allowed to lead to biases and prejudices.

#### Principles of Mission Command

- Building cohesive teams through mutual trust
- Create a shared understanding
- Provide clear commander's intent
- Exercise disciplined initiative
- Use mission orders
- Accept prudent risk

Figure 1. The Six Principles of Mission Command.

#### Organization of Paper

The first section of this study focuses on the framework provided by Hofstede's Cultural Dimensions Theory. This describes a generalizable and validated set of dimensions, which researchers theorize cultures around the world attach differing values to. Recognizing the values that different cultures attach to each of these dimensions can be used to identify and understand potential cultural friction points within multinational commands. By developing a common framework by which different cultures can be distinguished, we can begin to identify similarities and differences between the myriad organizations, both military and non-military, that Soldiers may find themselves partnering with or operating within.

<sup>9</sup> Department of the Army, ARDP 6-0: *Mission Command*. March 2014. 2-1.

This paper will discuss how a baseline of cultural values based upon social categorization and developed specifically for the Army may help prepare Soldiers for multinational operations. Through social categorization, the Army can simplify the immensely complicated concept of cross-cultural interaction, which may otherwise be difficult for Soldiers to master. However, while categorization can be helpful in educational and training environments, it can also have significant negative second and third order effects if they are not addressed properly. If the Army were to move forward with developing a cultural values baseline as described here, it will be critical to take potential tertiary effects into consideration in order to maximize its efficacy.

The second part of this study will discuss how social categorization can create in-group versus out-group comparisons and biases. It will explore potential ways to mitigate any group prejudice or discrimination based upon the social categorization described in the first section. A large body of scholarly research exists which demonstrates that "social categorization profoundly influences social perception, affect, cognition, and behavior."<sup>10</sup> This paper will review and synthesize some of the major findings of this research.

## **Understanding Culture through Research and Analysis**

### Hofstede's Mental Programing

The experiences over the last decade of conflict in Iraq and Afghanistan have once again directed a spotlight on the critical role of culture in military operations. These conflicts emphasized the need for military leaders to not only understand how to defeat an elusive enemy, but also to understand how to operate within a diverse population and with a variety of multinational partners. The nature of these conflicts dictated that the majority of attempts to understand foreign cultures were provisional and limited in focus to the conflicts at the time.<sup>11</sup> But as the Army prepares for the next conflict, it has become apparent that operations in the future are unlikely to be unilateral in nature, and instead will require the United States to almost invariably operate as a member of multinational partnerships.

The Army currently has a vast amount of experience working with international partners. Many Soldiers have likely experienced confusing cross-cultural encounters that left them scratching their heads and wondering how a seemingly ordinary interaction resulted in increased tension with members of their partner force. Sometimes these interpersonal conflicts are caused by

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<sup>10</sup> Dovidio, John et al., "Prejudice, Stereotyping and Discrimination: Theoretical and Empirical Overview," in *The Sage Handbook of Prejudice, Stereotyping and Discrimination*, edited by John Dovidio, Miles Hewstone, Peter Glick, and Victoria Esses, (London: Sage Publications Ltd, 2010): 14.

<sup>11</sup> As an example, the Army's Human Terrain System was created in response to a Joint Urgent Operational Needs Statement (JUONS) originating from Central Command in 2007, and shuttered as forces in Afghanistan were drawn down in 2014.



individual personality differences, but other times they are caused by preventable cultural misunderstandings.

Personality conflict is often unavoidable, but cultural misunderstandings can almost always be predicted and therefore mitigated. In order to identify the similarities and differences that can cause potential cultural friction points, social psychologists have attempted to identify a set of dimensions that exist across cultures. Geert Hofstede, a prominent social psychologist from the Netherlands, proposes that the differences that cause cultural friction can be attributed to our mental programming. He has simplified this concept of mental programming into three levels: (1) human nature, (2) culture, and (3) personality.<sup>12</sup> *Human nature* is universal across all communities and cultures. It is inherited and connects all human beings through shared attributes like “fear, anger, love, joy, sadness and shame.”<sup>13</sup> In contrast, *personality* is the “unique set of learned and inherited traits specific to each individual.”<sup>14</sup> *Culture* falls between human nature and personality. It is defined by Hofstede as “the learned framework of values and norms that connect individual personalities into groups, and differentiate one group from another.”<sup>15</sup>

The similarities and differences between cultures can reveal themselves in several ways.<sup>16</sup> They can be visible practices like symbols, heroes and rituals, or they can take the form of values, like collectivism or power distance. Hofstede uses an “onion” diagram to illustrate the relationship between cultural manifestations (See Figure 2). Visible practices are a fluid representation of culture which can evolve rapidly, while “values are broad tendencies to prefer certain states of affairs over others,” that are slow to change.<sup>17</sup> Hofstede believes that values are primarily dualistic in nature, dealing in pairings along a spectrum similar to “good versus evil,” or “forbidden versus safe.”<sup>18</sup>

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<sup>12</sup> Hofstede, Geert, Geert Jan Hofstede, and Michael Minkov. *Cultures and Organizations: Software of the Mind: Intercultural Cooperation and its Importance for Survival*. (New York, NY: McGraw Hill Press, 2010), 6-7.

<sup>13</sup> *Ibid.*

<sup>14</sup> *Ibid.*

<sup>15</sup> *Ibid.*

<sup>16</sup> *Ibid.*

<sup>17</sup> *Ibid.*, 8-9.

<sup>18</sup> *Ibid.*, 9.

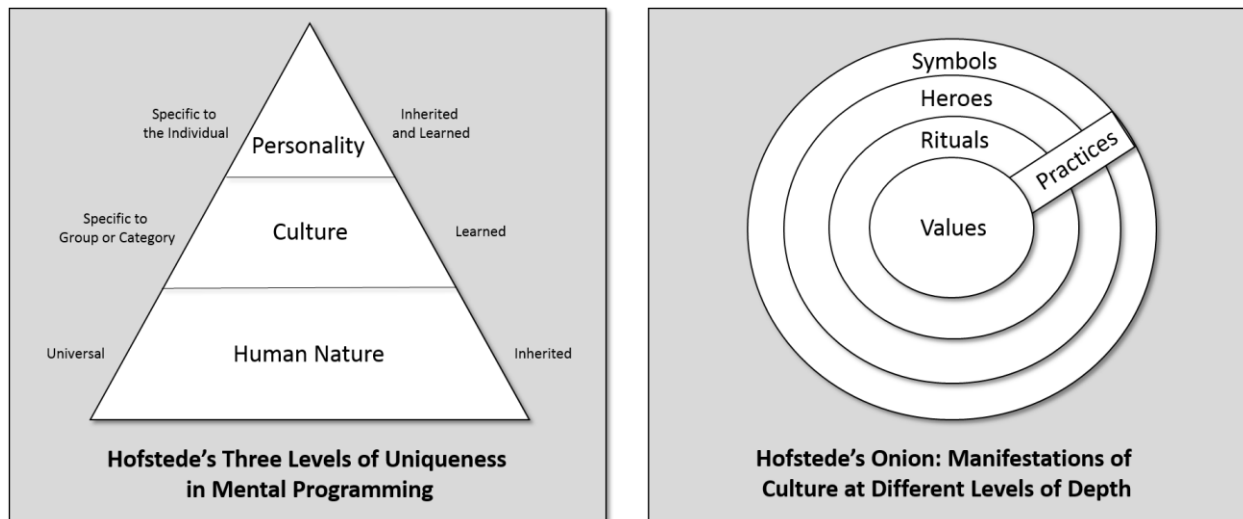


Figure 2. Hofstede's Three Levels of Mental Programming, and Onion Diagram on the levels of Culture.

### Dimensions of Culture

Military organizations are unique in that they operate within (and for) a specific national culture, yet they each have their own distinct organizational culture that may contrast sharply with features of the national culture they serve and protect. For instance, the hierarchical nature of the military differs vastly from mainstream, more individualistic American culture. Furthermore, it would be erroneous to claim that the U.S. Army, the U.S. Navy, the U.S. Air Force, and U.S. Marine Corps all have similar cultures because their members originate from within the U.S. population. It is because of the perceived differences between national culture and military culture, and the fact that each branch has a unique organizational culture, that this paper will focus on the intercultural work of Geert Hofstede.

### Dimensions of National Culture

Over the last several decades, Hofstede's work has identified the differences in values between cultures around the world. In order to do this, he first had to identify a generalizable set of "basic and enduring" dimensions and values.<sup>19</sup> Over the years, his work has identified six national level cultural dimensions (as shown in Figure 3), each representing a spectrum, on which nearly every national culture in the world can be placed according to their values. In addition to identifying each dimension, he also developed and validated research tools or indexes, to be used to determine the position of nations and organizations on each spectrum.<sup>20</sup>

<sup>19</sup> Hofstede, Geert, "Dimensionalizing Cultures: The Hofstede Model in Context," *Online Readings in Psychology and Culture* 2, no. 1 (2011): 7.

<sup>20</sup> *Ibid.*, 7.

<b>Dimension</b>	<b>Description</b>	<b>Table</b>
Power Distance	<ul style="list-style-type: none"> <li>The extent to which the less powerful members of a group accept and expect that power is distributed unequally.<sup>21</sup></li> <li>Small power distance describes cultures that have less perceived inequality between leaders and subordinates.</li> <li>Large power distance describes cultures that have more perceived inequality between leaders and subordinates.<sup>22</sup></li> </ul>	See Figure 13 located in Appendix A.
Uncertainty Avoidance	<ul style="list-style-type: none"> <li>The extent to which the members of a culture feel comfortable in ambiguous situations.<sup>23</sup></li> <li>Also known as tolerance for ambiguity</li> <li>Not to be confused with risk avoidance.</li> <li>Cultures with strong uncertainty avoidance attempt to minimize uncertainty by giving structure to unstructured situations through “strict behavioral codes, laws, deviant opinions and a belief in an absolute truth.”<sup>24</sup></li> <li>Cultures with weak uncertainty avoidance have been found to be more tolerant of differing views, and more comfortable in ambiguous unstructured situations.<sup>25</sup></li> </ul>	See Figure 14 located in Appendix A.
Individualism vs. Collectivism	<ul style="list-style-type: none"> <li>The degree to which individuals in a society are integrated into groups.<sup>26</sup></li> <li>Describes a societal rather than individual characteristic.</li> </ul>	See Figure 15 located in Appendix A.
Masculinity vs. Femininity	<ul style="list-style-type: none"> <li>The degree to which a society places emphasis on assertive and competitive values (masculinity) against modesty and caring values (femininity).<sup>27</sup></li> <li>Describes a societal rather than individual characteristic.</li> <li>Describes basic, often unconscious values, which may be viewed as taboo within some societies.<sup>28</sup></li> </ul>	See Figure 16 located in Appendix A.
Long-term vs. Short Term Orientation	<ul style="list-style-type: none"> <li>The degree to which a society approaches a given situation with the immediate versus the long term in mind.</li> <li>Short-term orientation describes cultures that place emphasis on quick results, and are concerned with social and status obligations.<sup>29</sup></li> <li>Long-term orientation describes cultures that prioritize perseverance and grit despite slow results, and value a willingness to subordinate oneself in certain circumstances.<sup>30</sup></li> </ul>	See Figure 17 located in Appendix A.
Indulgence vs. Restraint	<ul style="list-style-type: none"> <li>“Indulgence stands for a society that allows relatively free gratification of basic and natural human desires related to enjoying life and having fun.”<sup>31</sup></li> <li>“Restraint stands for a society that controls gratification of needs and regulates it by means of strict social norms.”<sup>32</sup></li> </ul>	See Figure 18 located in Appendix A.

Figure 3. Hofstede's 6 Dimensions of National Culture.

<sup>21</sup> Hofstede, Hofstede, and Minkov, “Cultures and Organizations,” 61.

<sup>22</sup> Hofstede, “Dimensionalizing Cultures,” 9.

<sup>23</sup> *Ibid.*, 10.

<sup>24</sup> *Ibid.*, 10-11.

<sup>25</sup> *Ibid.*

<sup>26</sup> *Ibid.*, 11.

<sup>27</sup> Hofstede, “Dimensionalizing Cultures,” 12.

<sup>28</sup> *Ibid.*, 13.

<sup>29</sup> Hofstede, Hofstede, and Minkov, “Cultures and Organizations,” 243.

<sup>30</sup> *Ibid.*

<sup>31</sup> Hofstede, “Dimensionalizing Cultures,” 15.

<sup>32</sup> *Ibid.*

## Dimensions of Organizational Culture

Hofstede then took his formula for identifying and validating generalizable values across a series of dimensions for national culture, and applied it to organizational cultures. Where the national cultural dimensions were comparisons of *values*, organizational cultural dimensions are a comparison of *practices*.<sup>33</sup> These dimensions of organizational culture are detailed in Figure 4. Looking back at Hofstede's onion (Figure 2), the organizational dimensions cover the outer three layers of symbols, heroes, and rituals. It is important to note that the organizational dimensions have not been validated to the same degree that the national dimensions have; however, they have been found to be relevant and partially generalizable in numerous studies.<sup>34</sup> Hofstede has identified a need to understand the mental programming of all members of an organization, rather than deriving the organizational culture from the leadership's assumptions of shared values throughout the organization.<sup>35 36</sup>

Dimension	Description
Process Orientation v. Results Orientation	<ul style="list-style-type: none"> <li>Process oriented cultures are typically identified by their focus on technical and bureaucratic routines.<sup>37</sup></li> <li>Results oriented cultures are diagnosed by their common concern for outcomes.<sup>38</sup></li> </ul>
Employee Oriented v. Job Oriented	<ul style="list-style-type: none"> <li>Employee oriented organizations assume a broad responsibility for their members well-being, well beyond job performance.<sup>39</sup></li> <li>Job oriented organizations assume responsibility only for the employee's job performance.<sup>40</sup></li> </ul>
Parochial v. Professional	<ul style="list-style-type: none"> <li>Members of parochial organizations typically derive their identity from the organization in which the work.<sup>41</sup></li> <li>Members of professional organizations typically identify with their profession.<sup>42</sup> In many cases, the members of an organization with a professional culture have a higher degree of education.<sup>43</sup></li> </ul>
Open v. Closed System	<ul style="list-style-type: none"> <li>The degree to which an organization accepts outsiders and newcomers, as well as internal and external communication mechanisms.<sup>44</sup></li> </ul>

<sup>33</sup> Hofstede, "Dimensionalizing Cultures," 19.

<sup>34</sup> *Ibid.*, 19-21.

<sup>35</sup> Hofstede, Geert, "Attitudes, Values and Organizational Culture: Disentangling the Concepts," *Organization Studies* 19, no. 3 (1998): 483.

<sup>36</sup> For more information regarding the research development and the collection methodology associated with Hofstede's dimensions of organizational culture, see: Hofstede, Geert. "Attitudes, Values and Organizational Culture: Disentangling the Concepts." *Organization Studies* 19, no. 3 (1998): 477-492.

<sup>37</sup> Hofstede, "Dimensionalizing Cultures," 20.

<sup>38</sup> *Ibid.*

<sup>39</sup> *Ibid.*

<sup>40</sup> *Ibid.*

<sup>41</sup> *Ibid.*

<sup>42</sup> *Ibid.*

<sup>43</sup> *Ibid.*

<sup>44</sup> *Ibid.*

Loose v. Tight Control	<ul style="list-style-type: none"> <li>• The degree to which an organization places emphasis on formality and punctuality within the organization.<sup>45</sup></li> </ul>
Pragmatic v. Normative	<ul style="list-style-type: none"> <li>• Pragmatic organizations are typically more flexible in nature.<sup>46</sup></li> <li>• Normative organizations more rigidly adhere to the application of regulations.<sup>47</sup></li> </ul>

Figure 4. Hofstede's Six Dimensions of Organizational Culture.

**Utilizing Hofstede’s Dimensions in a Military Capacity**

The set of recommendations made later in the white paper relies on the Army’s willingness to develop and validate a set of national and organizational values, based upon the work of Hofstede (or a similar set cultural dimensions).<sup>48</sup> This set may include all of the national and organizational values, or a selection of them. If the Army can identify those variables that are most applicable to understanding and reducing friction in multinational commands, it can then undertake a study to develop a baseline for understanding the cultures – not only for current and anticipated partners, but also for itself (in order to properly identify similarities and differences).

The recommendation to embrace Hofstede’s dimensions is similar to a recommendation made within the 2008 NATO Technical Report on “Multinational Military Operations and Intercultural Factors.”<sup>49</sup> The NATO report acknowledges that while there are many theoretical and empirical studies done outside of the military context, the body of knowledge concerning intercultural factors within a military context is “almost non-existent.”<sup>50</sup> This white paper proposes to help begin addressing this shortfall.

By developing a baseline to describe the cultures of the U.S. Army and its partners, all parties will be able to begin understanding, anticipating, and preparing for potential intercultural friction points which may impede interoperability. For example, when working with an international partner, if a command is armed with the knowledge that the partner’s power distance differs vastly from its own, the command can then prepare and train its leaders and staff members to be cognizant of the difference. This can enable them to tailor their plans and cooperative operations accordingly, to include developing mitigation strategies for any perceived cultural differences. By using Hofstede’s national and organizational dimensions of culture to identify and describe its own culture as well as partner cultures, the U.S. Army would be able to categorize partners along the aforementioned dimensions and highlight to what

<sup>45</sup> Hofstede, “Dimensionalizing Cultures,” 21.

<sup>46</sup> *Ibid.*

<sup>47</sup> *Ibid.*

<sup>48</sup> For an example of a different set of cultural dimensions, look to “Project GLOBE (Global Leadership and Organizational Behavior Effectiveness Research),”

<sup>49</sup> Febbraro, Angela, Brian McKee, Sharon Riedel, “Multinational Military Operations and Intercultural Factors.” Research and Technology Organization Technical Report. North Atlantic Treaty Organization (NATO), 2008.

<sup>50</sup> *Ibid.*, 4-13.

degree they contrast or correspond with its own values, and thereby enhance how soldiers prepare for multinational operations.

## Social Categorization

### Simplifying Complex Situations through Categorization

Categorization is the creation of boundaries that “distinguish the extent to which two (or more) groups are seen as distinct.” In learning environments, “categorization enables generalization from a few experiences to novel conditions while reducing dramatically the computational complexity of perceived objects or events.”<sup>51</sup> In other words, creating categories and categorical relations allows individuals to reduce overwhelming cognitive problems into a more manageable form, thus providing structure to how an individual understands his or her interactions with others.<sup>52</sup>

*“Just as category learning and category representations are functional necessities for dealing with objects and events in the environment generally, discrete social categories serve to simplify, structure, and regulate our understandings of and interactions with other people. By carving variability among individuals into discrete groupings, categorization reduces complexity and leads to enhanced perceived similarity within categories and contrasts (differentiation) between categories. Category distinctions influence both perception of and behavior towards category members, individually and collectively.”*<sup>53</sup>

“A salient social category is defined as one that functions psychologically to influence a person’s perception and behavior and how others treat the focal individual.”<sup>54</sup> For the military, social categorization can reduce the extra cognitive load placed upon Soldiers during multinational operations. By identifying how different military organizations compare on the various dimensions, the U.S. Army and its international partners can begin to train and prepare for the diversity of intercultural interactions they may experience while taking part in a multinational command.

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<sup>51</sup> Hammer, Rubi, Gil Diesendruck, Daphna Weinshall, and Shaul Hochstein, "The Development of Category Learning Strategies: What makes the Difference?" *Journal of Cognition* (in press): 1.

<sup>52</sup> Brewer, Marilyn, "Ethnocentrism and Prejudice: A Search for Universals," in *Social Psychology of Prejudice: Historical and Contemporary Issues*, edited by Christian Crandall and Mark Schaller (Lawrence, Kansas: Lewinian Press, 2004): 89.

<sup>53</sup> Brewer, "Ethnocentrism and Prejudice;" 89.

<sup>54</sup> Chatman, Jennifer, Jeffrey Polze, Sigal Barsade, and Margaret Neale. "Being Different Yet Feeling Similar: The Influence of Demographic Composition and Organizational Culture on Work Processes and Outcomes." *Administrative Science Quarterly* 43, no. 4 (1998): 750.

The “social categorization of [the] self and others generates a sense of in-group identification and belonging,” which “regulates perception, inference, feelings, behavior and interaction to conform to prototype-based knowledge one has about one’s own group and relevant outgroups.”<sup>55</sup> By creating a social category based upon Hofstede’s dimensions, the U.S. Army can render its own and its partner’s behavior into predictable patterns, allowing both to avoid unnecessary friction, plan effective action, and understand a prototype for how members of an out-group may behave.<sup>56</sup>

Looking at Figure 5 for example, let’s suppose that organizations A, B, and C are partnering within a multinational command. Being able to identify and understand beforehand that organization A closely aligns with the *power distance* and *uncertainty avoidance* of organization B, would be useful for planning purposes to help coordination between the participating forces. In addition to identifying any similarities, being able to understand that organization C differs greatly from both organizations A and B, in *power distance* and *uncertainty avoidance* would allow all parties involved to anticipate any potential friction long before any operations began. If for example, if an organization knew it had weak uncertainty avoidance (e.g. comfort with ambiguity), and that an upcoming operation would require planning with an organization that had a strong uncertainty avoidance (e.g. dislike of ambiguity), simply knowing that this difference exists could soothe any positional friction during the planning process. This knowledge would enable each party to enter operational planning knowing that it may need to make concessions concerning the level of detail involved in the plans.

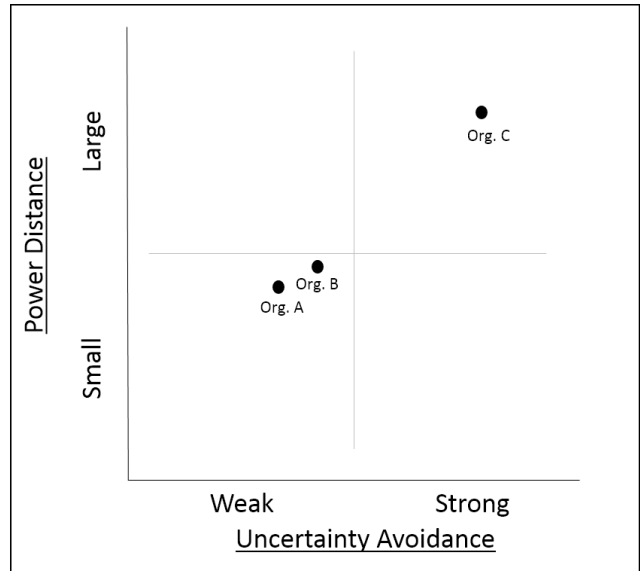


Figure 5. Graphic depiction of how organizations can be assessed using Hofstede's Dimensions.

The ability to identify this metaphoric “distance” between a selection of organizations can contribute to each organization’s preparation for working within a multinational coalition. This can also help commanders understand, anticipate, and diagnose friction points that may develop during multinational operations. While the diagnostic capability of categorization has the potential to empower Soldiers and leaders to better prepare for and carry out multinational operations, it also has the potential to cause even more friction among and between international partners if it is relied upon too heavily.

<sup>55</sup> Hogg, Michael, David Sherman, Joel Dierselhuis, Angela Maitner, and Graham Moffitt, “Uncertainty, Entitativity, and Group Identification,” *Journal of Experimental Social Psychology* 43 (2007): 136.

<sup>56</sup> *Ibid.*, 136.

## Creating In-group and Out-group Identifications through Social Categorization

“Categorization [can have] the effect of minimizing perceived differences within categories [but it can also] accentuate inter-category differences.”<sup>57 58</sup>

Identifying these similarities and differences between different groups can create new in-group and out-group distinctions, due to the fact that individuals instinctually align themselves with social categories that reflect similar values and exclude those perceived as different.<sup>59</sup> “When collective identity is salient, the distinction between in-group and out-group members as a consequence of social categorization has a profound influence on social

perception, affect, cognition, and behavior.”<sup>60</sup> Social scientists define in-groups as what individuals intuitively feel is the “we,” while out-groups are what individuals describe as the “they.”<sup>61</sup> Looking again at the example using the three organizations (A, B, and C), and power distance paired with uncertainty avoidance, we can see that there is a greater metaphoric “distance” between Organizations A and C, than between A and B (as depicted in Figure 6). By understanding these perceived similarities, members of organizations A and B may begin to develop an in-group identity due to their relative proximity and similarities. By creating an in-group by proximity, the situation also creates an out-group based upon the lack of shared traits with organization C. Creating these new boundaries that “distinguish the extent to which two (or more) groups are seen as distinct,” result in inter-group biases.<sup>62</sup> Members of organization

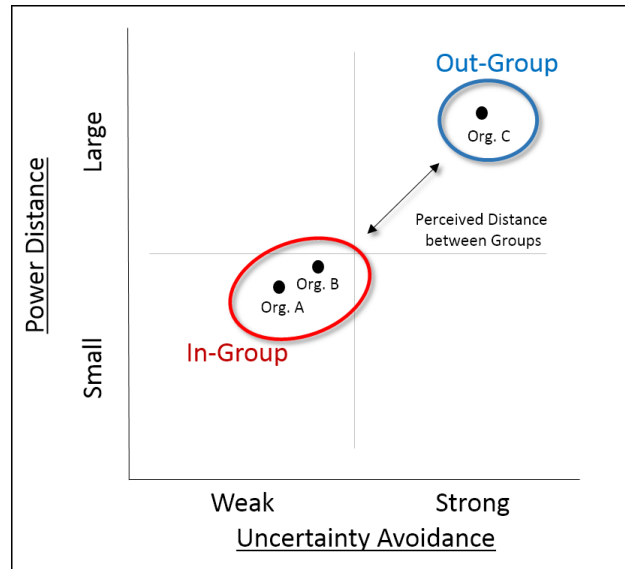


Figure 6. Depiction of perceived “distance” between groups.

<sup>57</sup> Tajfel, Henri. “Cognitive Aspects of Prejudice” *Journal of Social Issues* 25 (1969): 79-97.

<sup>58</sup> Brewer, Marilynn, “When Contact is not Enough: Social Identity and Inter-group Cooperation,” *Journal of Intercultural Relations* 20, no. 3/4 (1996): 292.

<sup>59</sup> *Ibid.*

<sup>60</sup> Dovidio, John, Samuel Gaertner, and Tamar Saguy. “Commonality and the Complexity of ‘We’: Social Attitudes and Social Change.” *Personality and Social Psychology Review* 13, no. 3 (2009): 5.

<sup>61</sup> Hofstede, Hofstede, and Minkov, “Cultures and Organizations,” 16.

<sup>62</sup> Park, Bernadette, and Charles Judd. “Rethinking the Link between Categorization and Prejudice within the Social Cognition Perspective.” *Personality and Social Psychology Review* 9, no. 2 (2005): 113.



A may identify with members from organization B based upon shared values, thus creating a “we,” which contrasts to the “they” of organization C.

Research has shown that ethnocentric loyalty and inter-group biases do not depend upon kinship or an extensive history of interpersonal relationships among group members, but that they can be “engaged by symbolic manipulations that imply shared attributes or common fate.”<sup>63</sup> The biases and resulting prejudice may not be irrational thought processes, but rather a “consequence of attempting to organize and simplify the environment [through social categorization].”<sup>64</sup> <sup>65</sup> Therefore, “upon social categorization of individuals into in-groups and out-groups, people spontaneously experience more positive affect toward the in-group.”<sup>66</sup> They may also favor in-group members directly in terms of evaluations and resource allocations.<sup>67</sup> <sup>68</sup> In addition to potentially favoring the perceived in-group, “a large body of research has demonstrated that social categorization profoundly influences social perception, affect, cognition, and behavior.”<sup>69</sup> These influences can have a direct impact on the emotional<sup>70</sup> <sup>71</sup>, cognitive<sup>72</sup> <sup>73</sup> <sup>74</sup>, and behavioral<sup>75</sup> <sup>76</sup> aspects of Soldiers, all of which fall within the scope of the human dimension.

Returning to the example using organizations A, B, and C: if A is in command of an operation consisting of teams from A, B, and C, A may be more likely to delegate decision making authority to teams lead by members of B rather than C, due to the fact that A can more readily

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<sup>63</sup> Brewer, “Ethnocentrism and Prejudice,” 82.

<sup>64</sup> Park and Judd, “Rethinking the Link between Categorization and Prejudice within the Social Cognition Perspective,” 110.

<sup>65</sup> Wilder, D. A., “Perceiving Persons as a Group: Categorization and Intergroup Relations.” In *Cognitive Processes in Stereotyping and Intergroup Behavior*, ed. D. L. Hamilton (Hillsdale, NJ: Lawrence, 1981), 213-258.

<sup>66</sup> Brewer, “Ethnocentrism and Prejudice,” 82.

<sup>67</sup> *Ibid.*

<sup>68</sup> Tajfel, H., M.G. Billig, R.P. Bundy, and Claude Flament, “Social Categorization and Intergroup Behavior,” in *European Journal of Social Psychology* 1, no. 2 (1971): 149-178.

<sup>69</sup> Dovidio et al., “Prejudice, Stereotyping and Discrimination,” 14.

<sup>70</sup> Otten, Sabine, and Gordon Moskowitz, “Evidence for Implicit Evaluative In-Group Bias: Affect-Biased Spontaneous Trait Inference in a Minimal Group Paradigm,” *Journal of Experimental Social Psychology* 36, no. 1 (2000): 77-89.

<sup>71</sup> Hogg, Michael, and Sarah Hains, “Intergroup Relations and Group Solidarity: Effects of Group Identification on Social Beliefs on Depersonalized Attraction,” *Journal of Personality and Social Psychology* 70, no. 2 (1996): 295-309.

<sup>72</sup> Park, Bernadette, and Myron Rothbart, “Perception of Out-Group Homogeneity and Levels of Social Categorization: Memory for the Subordinate Attributes of In-Group and Out-Group Members,” *Journal of Personality and Social Psychology* 42, no. 6 (1982): 1051-1068.

<sup>73</sup> Wilder, “Perceiving Persons as a Group.” 213-258.

<sup>74</sup> Howard, John, and Myron Rothbart. “Social Categorization and Memory for In-Group and Out-Group Behavior.” *Journal of Personality and Social Psychology* 38, no. 2 (1980): 301-310.

<sup>75</sup> Worschel, S., H. Rothgerber, E. Day, D. Hart, and J. Butemeyer. “Social Identity and Individual Productivity within Groups.” *Journal of Social Psychology* 37, no. 4 (1998): 389-413.

<sup>76</sup> Insko, C., J. Schopler, L. Gaertner, T. Wildschut, R. Kozar, B. Pinter, E. Finkel, D. Brazil, C. Cecil, and M. Montoya. “Interindividual-Intergroup Discontinuity Reduction through the Anticipation of Future Interaction.” *Journal of Personality and Social Psychology* 80, no. 1 (2001): 95-111.

understand and identify with how *B* is likely to conduct operations. The philosophy of mission command is dependent upon the concept of creating cohesive teams based on mutual trust. If organization *A* is perceived by organization *C* to more readily trust organization *B* over *C* due to their shared values, it can result in a lack of trust reciprocated from organization *C* towards both *A* and *B*. As trust remains one of the foundational building blocks of mission command, an understanding of these crucial cultural differences has tremendous implications for multinational partnerships. This kind of break down in trust is the result of a concept called *stereotype threat*, which occurs when members of one identity group become aware of the perceived stereotypes that another group holds towards them.<sup>77</sup> In addition to the breakdown in trust, research has shown that “biased expectancies influence how perceivers behave, causing targets, often without full awareness to conform to perceivers expectations.”<sup>78</sup> In other words, the biases that *A* and *B* hold toward *C*, while initially not supported by behavior, may in fact influence the behaviors of *C* and fulfill the stereotypes held by both *A* and *B*.

### Stereotypes, Prejudice, and Discrimination through group identification

As discussed earlier, categorization can simplify how an individual perceives a complex environment and lessen the overall cognitive burden it takes to make sense of it. While direct causation has not yet been established, most research has pointed to a positive correlation between categorization and intergroup bias.<sup>79</sup> However, one study has shown that intergroup bias may not occur until the groups share some common fate (i.e., the rewarding of one group over another, or shared common goal dependent upon the actions of both groups).<sup>80 81</sup> Social bias towards groups or individuals can come in many forms, but the three focused on within this white paper are: prejudice, stereotypes, and discrimination.

### Intra-psychic Phenomena

Stereotypes and prejudice are both what psychologists call *intra-psychic* phenomena, meaning they exist within the mind or psyche. Intra-psychic phenomena occur “within an individual and may vary not only in their transparency to others but also in the level of awareness of the person who harbors them.”<sup>82</sup> The creation of in-group and out-group identities based upon the

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<sup>77</sup> Dovidio et al., “Prejudice, Stereotyping and Discrimination,” 8.

<sup>78</sup> *Ibid.*

<sup>79</sup> Park and Judd, “Rethinking the Link between Categorization and Prejudice within the Social Cognition Perspective,” 115.

<sup>80</sup> *Ibid.*, 113.

<sup>81</sup> Rabbie, Jacob, and Murray Horwitz, “Arousal of In-group-out-group Bias by a Chance Win or Loss,” *Journal of Personality and Social Psychology* 13, no. 3 (1969): 269-277.

<sup>82</sup> Dovidio et al., “Prejudice, Stereotyping and Discrimination,” 10.

generalization of values among members of an organization increases the potential for the development of stereotypes and prejudice towards different groups whether the perceiver is aware of it or not.

## Stereotypes

This generalization of a group of individuals, may develop into cognitive schemas used by social perceivers to process information about others, or stereotypes.<sup>83 84</sup> Stereotypes are defined as the “associations and beliefs about the characteristics and attributes of a group and its members that shape how people think about and respond to the group.”<sup>85</sup> Holding a stereotype about a group can generate expectations about its members’ anticipated behavior in novel situations.<sup>86</sup> These biased expectancies can then influence how the perceiver behaves towards the stereotyped individual, which in turn can cause the person being stereotyped to consciously or unconsciously conform to those expectations.<sup>87</sup>

Stereotypes can also lead to a phenomenon known as *stereotype threat*. Stereotype threat occurs when “members of a stereotyped group become aware of negative stereotypes about them, even when (a) a person holding the stereotype is not present and (b) they personally do not endorse the stereotype.”<sup>88 89</sup>

## Prejudice

Where stereotypes are associations and attributes about specific characteristics of a group, *prejudice* is the attitude that reflects the overall evaluation of that group.<sup>90</sup> Prejudice is “an individual-level attitude (whether subjectively positive or negative) towards groups and their members that creates or maintains hierarchical status relations between groups.”<sup>91</sup>

Social Psychologist Marilyn Brewer breaks prejudice down into three distinct categories: (1) in-group prejudice, (2) out-group prejudice, and (3) inter-group prejudice.

*In-group prejudice* is the differentiation of the in-group against everyone else. It can be simplified into a distinction of “us/not us.”<sup>92</sup> Within this type of prejudice the specific distinction of an out-group is not necessary. As an illustration, specific military units may utilize this form of prejudice on a day-to-day basis. If the members of a military unit have a higher degree of *esprit de corps* for their particular unit than for the organization as a whole, they may

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<sup>83</sup> Dovidio et al., "Prejudice, Stereotyping and Discrimination," 7.

<sup>84</sup> Hilton, and von Hippel, "Stereotypes," Annual Review of Psychology 47 (1996): 237-271.

<sup>85</sup> Dovidio et al., "Prejudice, Stereotyping and Discrimination," 7.

<sup>86</sup> *Ibid.*

<sup>87</sup> *Ibid.*

<sup>88</sup> Dovidio et al., "Prejudice, Stereotyping and Discrimination," 8.

<sup>89</sup> Steele, Claude. "A Threat in the Air: How Stereotypes Shape Intellectual Identity and Performance." American Psychologist 52, no. 6 (1997): 613-629.

<sup>90</sup> Dovidio et al., "Prejudice, Stereotyping and Discrimination," 7.

<sup>91</sup> *Ibid.*

<sup>92</sup> Brewer, "Ethnocentrism and Prejudice," 90.

develop a prejudice against members of the organization that are not members of the specific unit.

In contrast, *out-group prejudice* focuses primarily on a specific out-group without needing a specific in-group to be involved.<sup>93</sup> It can be simplified into a “them/me” distinction. This form of prejudice can be particularly divisive, and is often accompanied by negativity, hostility, and discrimination.<sup>94</sup> “Many forms of institutional racism and sexism are probably attributable to discrimination based on in-group preference rather than prejudice against out-groups.”<sup>95</sup>

The third type of prejudice identified by Brewer is *inter-group prejudice*. This form “derives from the relationship between an in-group and specific out-groups, and can be described as an “us/them” relationship. Inter-group prejudice is “activated by intergroup comparison and competition, with the consequence that in-group benefits come at the expense of the out-group and vice-versa.”<sup>96</sup> This form of discrimination is typically motivated more by in-group protection (rather than enhancement).<sup>97</sup>

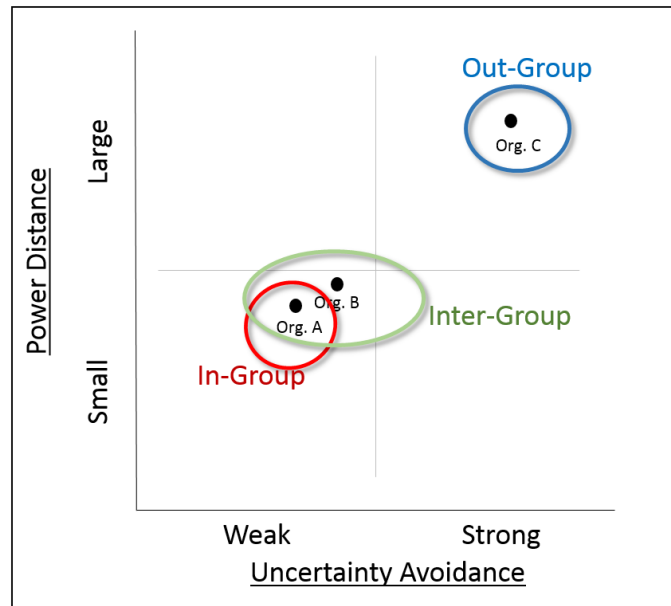


Figure 7. Depiction of Inter-group Prejudice.

If we return to our scenario involving organizations A, B and C, we can see how both in-group prejudice, and inter-group prejudice can easily be formed based upon social categorization and the information provided by comparing cultural values (See Figure 7).

## External Manifestations of Prejudice

### Discrimination

When attitudes towards, and associations of, specific groups begin affecting the behavior of the perceiver, it shifts from being an intra-psychic phenomenon to being an external manifestation of discrimination. Discrimination is “a behavior that creates, maintains, or reinforces

<sup>93</sup> Brewer, “Ethnocentrism and Prejudice,” 91.

<sup>94</sup> *Ibid.*

<sup>95</sup> *Ibid.*, 83.

<sup>96</sup> *Ibid.*, 91.

<sup>97</sup> *Ibid.*

advantages for some groups and their members over other groups and their members.”<sup>98</sup> Discrimination can range from very subtle, such as praising one group over another for the same activity, to the very blatant, such as active negative behavior towards a group.<sup>99</sup> In addition to ranging in intensity, discrimination can also consist of an action that either directly affects or disadvantages one group, or unfairly favors the discriminator’s own group.<sup>100</sup>

Using the example of organizations A, B, and C again, we can illustrate how discrimination can break down the levels of trust and cohesion within a team. Imagine that multinational organization ABC is planning for an operation. Groups A and B are more comfortable with a degree of uncertainty, while group C has been shown to avoid uncertainty at any cost. Organizations A and B may feel that inviting organization C to any planning meetings, or giving C control of any elements of the planning, may unnecessarily delay or hinder the process with details they consider extraneous. The existing stereotype may impede organizations A and B from developing a relationship based upon mutual trust in C. Furthermore, subsequent discrimination against C may cause A and B to lose trust in the other similar organizations now and in the future.

### **Mitigating the Consequences of Categorization**

The U.S. Army anticipates that the success of future operations will depend to a significant degree on multinational cooperation. One approach to anticipating and resolving potential cultural friction points is through categorization. But social categorization, while helpful for developing a baseline understanding of cultural similarities and differences between groups, can lead to unintended consequences related to group identity and the formation of positive and negative biases. This section will discuss several theories and models that describe different approaches to breaking down the mental barriers that are constructed during categorization.

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<sup>98</sup> Dovidio et al., "Prejudice, Stereotyping and Discrimination," 8.

<sup>99</sup> *Ibid.*, 10.

<sup>100</sup> *Ibid.*

## Decategorization

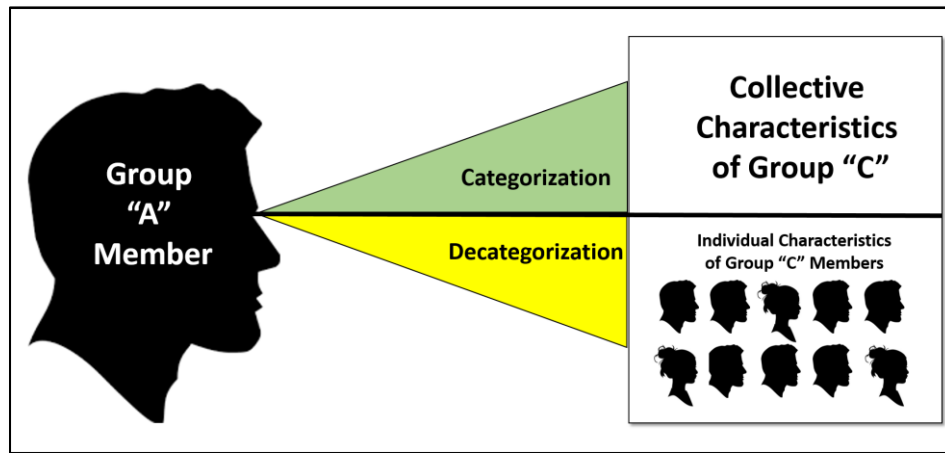


Figure 8. Depicts how Categorization and Decategorization differ conceptually.

One of the unintended consequences of categorization is the de-personalization of the members of an out-group.<sup>101</sup> Research has shown that social behavior in “category-based interactions are characterized by a tendency to treat individual members of the out-group as undifferentiated representatives of a unified social category, independent of individual differences that may exist within groups.”<sup>102</sup>

To combat the de-personalization associated with social categorization, social psychologists have suggested *decategorization*. This represents an attempt to personalize interactions. Decategorization breaks down the usefulness of category distinctions by focusing on inter-group interactions to re-personalize the in-group’s views of the out-group. Two studies have found that after participants engaged in a cooperative team task with members of an out-group category, those who interacted under more personalized conditions showed significantly less in-group bias at the end of the experience.<sup>103 104</sup>

<sup>101</sup> Brewer, “When Contact is not Enough,” 293.

<sup>102</sup> *Ibid.*

<sup>103</sup> Miller, Norman, Marilyn Brewer, and Keith Edwards. “Cooperative Interaction in Desegregated Settings: A Laboratory Analogue.” *Journal of Social Issues* 41, no. 3 (1985): 63-79.

<sup>104</sup> Bettencourt, B. et al., “Cooperation and reduction of Intergroup Bias: The Role of Reward Structure and Social Orientation,” *Journal of Experimental Social Psychology* 28 (1992): 301-319.

## Recategorization

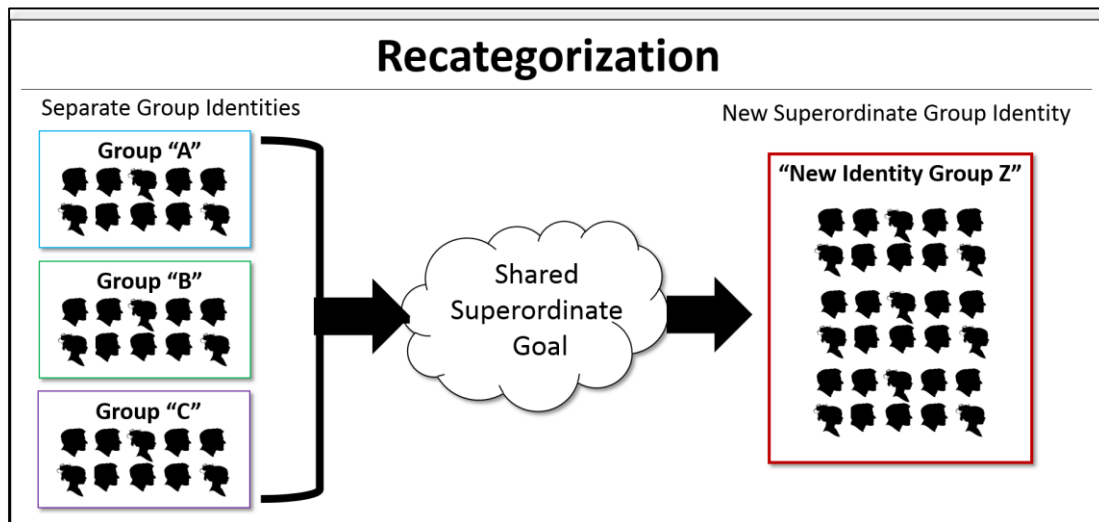


Figure 9. Illustrates the process of Recategorization.

*Recategorization* is the creation of a common in-group identity. It is formed upon the basis that a common identity can be formed around achieving a shared superordinate goal.<sup>105</sup> Proponents of recategorization argue that creating shared goals enables group members to think as one unit, rather than two distinct groups, thus minimizing the attention given to categorical differences.<sup>106 107</sup> "With recategorization, as proposed by the common identity group model, the goal is to reduce bias by systematically altering the perception of intergroup boundaries, redefining who is conceived of as an in-group member."<sup>108</sup>

When recategorization is successful, all biases towards an individual's in-group are transferred to the new social group category.<sup>109</sup> However, this new social categorization requires members from both sub-groups to subordinate an identity that they may have held for many years in favor of a new identity. This can be extremely difficult depending on how entrenched a social identity may be.

"A sense of superordinate identity, if successfully established, may be difficult to sustain."<sup>110</sup> This is even more likely to be true if the social grouping is temporary in nature, as would be in the case of a multinational command. For instance, U.S. Army Soldiers may be part of a NATO operation, and hold a shared goal with their NATO partners, but they are likely to continue to identify as U.S. Soldiers and not as a NATO soldiers. Aligning superordinate goals in international

<sup>105</sup> Brewer, "When Contact is not Enough," 294.

<sup>106</sup> *Ibid.*

<sup>107</sup> Gaertner S. et al., "The Common In-group Identity Model: Recategorization and the Reduction of Intergroup Bias," *European Review of Social Psychology* 4 (1993): 1-26.

<sup>108</sup> Dovidio, Gaertner, and Saguy, "Commonality and the Complexity of 'We': Social Attitudes and Social Change," *Personality and Social Psychology Review* 13, no. 3 (2009): 5.

<sup>109</sup> Brewer, "When Contact is not Enough," 294.

<sup>110</sup> Dovidio, Gaertner, and Saguy, "Commonality and the Complexity of We," 6.

commands may also be more difficult than just providing a commander’s intent and desired end-state. Some nations may be focused more on mission accomplishment, while others may be there largely to uphold their end of a treaty and as such may be primarily concerned with troop welfare and fulfilling their nominal obligations. In addition to the difficulties associated with the creation of a superordinate identify, “efforts to induce a common identity may be met with resistance that can increase bias between members of the original groups. When a group identity is threatened, either by a perceived threat or actual threat, “people become motivated to reestablish positive and distinctive group identities and thereby maintain relatively high levels of intergroup bias.”<sup>111</sup>

### Subcategorization

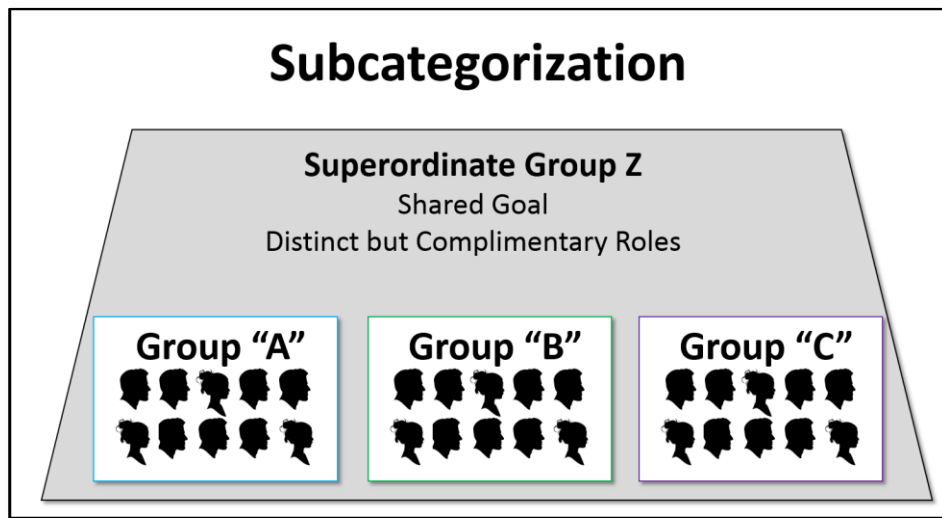


Figure 10. Depicts the maintenance of a unique group identity within a superordinate group.

*Subcategorization* is based upon the *Distinct Social Identity Model*, which asserts that the need for positive social identity should be capitalized upon in the inter-group contact situation.<sup>112 113</sup> In this model, categorized identities remain salient, but the environment or situation is structured in a way that enables each group to have distinct but complementary roles within a cooperative framework.<sup>114</sup>

A key aspect of subcategorization is the emphasis on positive inter-group contact. By focusing on positive inter-group contact, the hope is that the positive perception will overtake any

<sup>111</sup> Dovidio, Gaertner, and Saguy, “Commonality and the Complexity of We,” 6.

<sup>112</sup> Brewer, “When Contact is not Enough,” 294.

<sup>113</sup> Brown, Rupert, James Vivian, and Miles Hewstone, “Changing Attitudes through Inter-group Contact: the Effects of Group Membership Salience,” *European Journal of Social Psychology* 29 (1999): 744.

<sup>114</sup> Brewer, “When Contact is not Enough,” 295.



negative perceptions between the in-group and out-group.<sup>115</sup> “By changing the perceived interdependence between groups [...] the associated category-based evaluations are also expected to change.”<sup>116</sup>

### Optimal Distinctiveness Theory

In contrast to decategorization, recategorization, and subcategorization—all of which focus on promoting either a new group identity or reinforcing an existing identity—Marilynn Brewer developed the *Optimal Distinctiveness Theory*. This theory establishes a balance between assimilation and differentiation.<sup>117</sup> Brewer theorizes that social identity is “derived from two opposing motivational systems that govern the relations between self-concept and membership in social groups.”<sup>118</sup> The two systems are (1) a need for assimilation and inclusion, and (2) an opposing desire to differentiate oneself from a particular social identity. These systems have a negative relationship: as the need for assimilation is satisfied, the desire for differentiation increases. Therefore, each of the three aforementioned methods for combating prejudice is inherently unstable, as described in Figure 11.

	Potential Reasons for Instability
Decategorization	“Unstable because [it] does not satisfy individuals’ needs for assimilation/inclusion within a clear bounded unit.” <sup>119</sup>
Recategorization	“Potentially unstable because does not satisfy the need for differentiation/exclusiveness.” <sup>120</sup>
Subcategorization	“Sub-group identification breeds strong intragroup trust and loyalty, but also promotes intergroup distrust and social competition,” which can allow points of conflict to readily develop. <sup>121</sup>

Figure 11. Descriptions of how decategorization, recategorization, and subcategorization may all be inherently unstable.

<sup>115</sup> Brewer, “When Contact is not Enough,” 295.

<sup>116</sup> *Ibid.*

<sup>117</sup> *Ibid.*, 296.

<sup>118</sup> *Ibid.*

<sup>119</sup> *Ibid.*, 297.

<sup>120</sup> *Ibid.*

<sup>121</sup> *Ibid.*

Optimal distinctiveness is achieved by social categorization when the “need for assimilation and belonging is met within the social group,” and the “need for differentiation is met by intergroup distinctions.”<sup>122</sup> Brewer states that this can be achieved when social category boundaries are “clearly defined enough to ensure both inclusion and exclusion.”<sup>123</sup> Ultimately, this leads to a combination of the three techniques of categorization mentioned earlier. Brewer believes that “an integrated perspective would involve the presence of a salient superordinate level of categorization that simultaneously preserves subordinate differentiation and individualization of the members of subgroups.”<sup>124</sup> This can be achieved by creating social structures within organizations that are characterized by “cross cutting roles,” rather than hierarchical roles.<sup>125</sup>

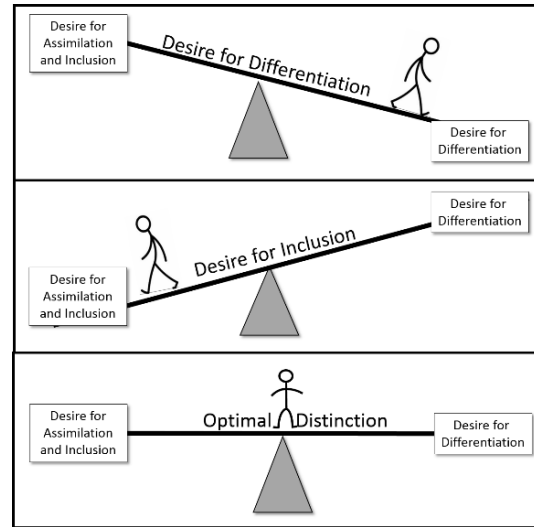


Figure 12. Illustrates the balance involved with Optimal Distinction Theory.

### Conclusion and Recommendations

Uncertainty will continue to be a hallmark characteristic of conflict. As the U.S. Army anticipates and prepares for the operational environment of the future, removing uncertainty when possible remains paramount for continued success. The nature of expeditionary warfare makes it difficult to predict *where* or *why* U.S. Soldiers may be operating in a given location. But given the characteristics of international alliances and coalitions, the Army may be able to predict and prepare for *who* U.S. Soldiers will be operating alongside. Over the last decade, the U.S. military has emphasized understanding the culture of our enemies as well as the populations they emerge from and operate within. This emphasis, however, has not yet evolved into better understanding the cultural similarities and differences of our partners and the possible implications that cultural characteristics may have on multinational interoperability.

This white paper proposes that the Army use *social categorization* to help predict potential friction points during multinational operations. It involves identifying social categories which serve to simplify, structure, and regulate our understandings of and interactions with other people. Social categorization is a mechanism that may help the U.S. Army and its partners prepare for working more effectively within multinational commands, while simultaneously

<sup>122</sup> Brewer, “When Contact is not Enough,” 296-297.

<sup>123</sup> *Ibid.*

<sup>124</sup> *Ibid.*

<sup>125</sup> *Ibid.*

reducing the increased cognitive strain that accompanies working in an intercultural environment.

This study identified using social categorization, through Hofstede's cultural dimensions, as a potential tool for aiding soldiers as they train and prepare for operating in multinational commands. While social categorization will enable soldiers to simplify and make sense of an immensely complicated concept, it carries with it the potential to lead to social groupings and create or perpetuate biases and prejudices. If the Army decides to use social categorization to help predict and mitigate potential friction points within multinational commands, then it would also be necessary for the Army to create a parallel effort aimed at mitigating the negative second and third order effects of social categorization.

This white paper has introduced several techniques for mitigating social biases and prejudices, each with their own potential benefits and disadvantages. Ultimately, there may not be one specific technique suited for all instances within a military context. Specific situations, and the factors which shape them, may dictate that optimal distinctiveness is perhaps best suited as a way to mitigate biases and create group cohesion. Then again, given a different situation, shaped by a separate set of factors, decategorization or recategorization may be the strategy best suited for mitigating biases and creating group cohesion. Since the right answer is prone to be entirely situation dependent, the Army should strive to prepare its leaders with the knowledge to choose the correct strategy for each situation they encounter.

With this in mind, we propose the following recommendations for reducing potential friction points during multinational operations. Following the recommendations is a list of several Army initiatives and organizations that appear to be well suited for addressing some of these recommendations.

## **Recommendations**

### **Research and Analysis**

- 1.** Develop and validate an assessment tool based upon Hofstede's dimensions of national and organizational culture (or a similar set of cultural dimensions) for the specific purpose of improving the US Army's effectiveness when operating in multinational partnerships.
- 2.** As a follow up to recommendation 1, the HDCDTF recommends that the U.S. Army conduct a pilot study using a small number of international partners. This study should use the validated assessment tool (mentioned in the previous recommendation) to develop a baseline assessment of each international partner (including an assessment of

the U.S. Army). This baseline assessment should then be used to assist all partners as they prepare and plan for an existing multinational staff exercise.

### **Mitigation of the Consequences of Social Categorization**

3. Conduct experimentation to identify the technique, or techniques (decategorization, recategorization, subcategorization, or optimal distinctiveness) best suited for combating the second and third order effects of social categorization in a military context, where social categories are more likely to be centered on a firmly held national identity.

### **Education and Training**

4. Develop and implement multicultural training and education curriculum which trains Soldiers to not only understand their *personal cultural biases*, but also to understand how to identify and mitigate these personal biases when working in a multicultural setting.
5. Investigate the potential for developing a new curriculum (or promoting an existing curriculum) aimed at teaching individuals in leadership positions how to *foster a multicultural environment* that mitigates biases and prejudices. This curriculum should fortify leaders with different mitigation strategies, and also the ability to understand the situational applicability of each.

### **Operational Support**

6. Create an organization aimed at providing a social science capacity to support operational units, both during training and while deployed overseas. Understanding and utilizing social science theories and perspectives during education and training is beneficial, but ensuring that these perspectives and theories are being applied during actual operations could have an enormous impact on the success of operations. Previously, this role was filled with a limited scope, by the Army's Human Terrain System (HTS). An organization focused on providing operational social science expertise could assist commanders and their subordinates as they attempt to navigate the ambiguous and complex cross-cultural operational environment of the future. As Navy Admiral Eric Olsen (*ret.*) recently noted in an opinion piece in the *Wall Street Journal*, the ideal

military recruit is someone who has “a Ph.D. [and] who could win in a bar fight.”<sup>126</sup> While it may be difficult to make this ideal a reality, the Army should continue to embrace the “Whole Army” concept, and bring in Army Civilians with social science expertise who can enable leaders and soldiers to better understand the nuances of future operations and conflicts.

## **Army Organizations, Concepts, and Initiatives Positioned to Address this Topic**

### **Regionally Aligned Forces**

Regional alignment is an organizing policy that improves the Army's ability to provide responsive, specifically trained, and culturally attuned forces to support Combatant Command (COCOM) requirements. Regionally Aligned Forces (RAF) is the Total Army, (Active, Guard, Reserve), and all force pool categories, (Assigned, Allocated, Service Retained-COCOM aligned (SRCA)). RAF encompasses the Army Institutional, Generating, and Operating forces and the full range of Army capabilities from operations and operations support to force sustainment.

Potential Role: The RAF's are the frontline interactors with partner forces around the world. Ultimately, all training and education developed concerning reducing cultural friction points will be implemented through the Regionally Aligned Forces.

### **Culture, Regional Expertise, and Language Management Office (CRELMO)**

The CRELMO creates a sustainable advantage for regionally aligned forces in any combination of indigenous cultures by providing training and education tools that enhance Professional Military Education, Pre-Deployment and Functional Training. Culture, Regional Expertise and Language (CREL) is a

critical strategic security concept to prepare globally responsive and regionally aligned forces that work with a variety of partners including host nation militaries and populations to execute our Prevent, Shape and Win strategic role. In conjunction with its subordinate organizations,



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<sup>126</sup> Olsen, Eric, “The New U.S. Military Recruit: ‘A PhD Who Could Win a Bar Fight’,” *The Wall Street Journal*, December 8, 2015, accessed December 22, 2015, <http://www.wsj.com/articles/the-new-u-s-military-recruit-a-ph-d-who-could-win-a-bar-fight-1449589994>

CRELMO provides daily management oversight in directing, synchronizing, integrating the Army's Culture, Regional Expertise, and Language capabilities and requirements.<sup>127 128 129</sup>

**Potential Role:** CRELMO is the coordinating office for culture and regional expertise within the Combined Arms Center (CAC). Cultural Interoperability is a concept which crosscuts through many different Army programs, commands, and initiatives. CRELMO is well positioned to be the coordinating office for any efforts aimed at reducing cultural friction and increasing the multinational interoperability of Mission Command.

### **Army Research Institute for Behavioral and Social Sciences**

ARI's Science and Technology (S&T) research mission is to create and provide innovative behavioral and social science solutions that enable the Army to provide ready forces and force capabilities. ARI achieves this mission through:

- Developing innovative measures and methods to improve/enhance the Soldier lifecycle and human capital management.
- Conducting scientific assessments and providing behavioral and social science advice to human resource authorities, and to inform human resource policies.
- Developing fundamental theories and investigating new domain areas in behavioral and social sciences with high potential impact on Army issues.



**Potential Role:** If the recommendations found within this white paper are implemented, ARI could potentially play a pivotal role in the development and validation of the proposed Army cultural assessment tool (recommendation 1). ARI could also potentially take a leading role in the pilot study and validation of this tool (recommendation 2), as well as in the development of mitigation strategies and multicultural classes based upon the findings of recommendations 1 and 2 (recommendations 3 and 4).

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<sup>127</sup> For more information concerning the future direction of Culture, Regional Expertise, and Language within the United States Army, please see: Willoughby, Monty, and Mahir Ibrahimov. "Army Language, Regional Expertise, and Culture Program." *Military Intelligence Professional Bulletin*, July-September (2014): 12-21.

<sup>128</sup> More information for CRELMO can be found at: [https://atn.army.mil/dsp\\_Links.aspx](https://atn.army.mil/dsp_Links.aspx)

<sup>129</sup> The Culture, Regional Expertise, and Language Management Office can be contacted at: 913-684-3345.

## **TRADOC Culture Center (TCC)**

Established in 2004, TCC provides relevant and accredited cultural competency training and education to Soldiers and DA Civilians in order to build and sustain an Army with the right blend of cultural competency capabilities to facilitate a wide range of operations, now and in the future.



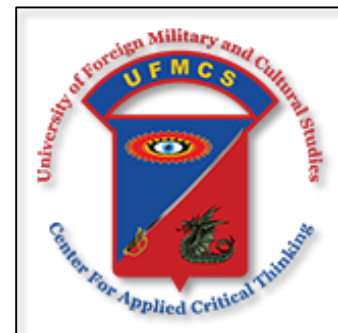
Potential Role: Based upon the findings from the implementation of recommendations 1-3, the TRADOC Culture Center could potentially be the right organization (or part of a group of organizations overseen by CRELMO) to develop multicultural training aimed at mitigating cultural and group biases (recommendations 4 and 5).

## **University of Foreign Military and Cultural Studies (UFMCS)/ Red Teaming**

The UFMCS mission is to develop Army leaders who are agile and adaptive critical thinkers, and who operate effectively in complex and rapidly changing operational environments.

The mission of the UFMCS is multidimensional:

- 1) UFMCS provides functional training for Red Team leaders and members.
- 2) UFMCS, in concert with Army University provides Applied Critical Thinking (ACT) and Groupthink Mitigation (GTM) education across all Army Centers and Schools.
- 3) UFMCS provides tailored programs of education or problem facilitation to operational units associated with training or pre-deployment.
- 4) UFMCS supports combat development and 2025 conceptualization with education and facilitation.
- 5) UFMCS engages with organizations external to the Army as an engine for continued innovation across the cognitive dominance domain.
- 6) UFMCS serves as the Executive Agent for the Army proponent for Red Teaming and serves as a repository of tools and best practices for Red Teaming across the Department of Defense.



Potential Role: UFMCS currently teaches methods aimed at fostering cultural empathy, and making informed decisions based upon cultural empathy. The findings of the proposed studies could inform how this course evolves into the future. UFMCS

could also play a role in the development and implementation of recommendations 4 and 5.

### **Mission Command Training Program (MCTP)**

The Mission Command Training Program supports the collective training of Army units as directed by the Chief of Staff of the Army and scheduled by Forces Command in accordance with the ARFORGEN process at worldwide locations in order to train leaders and provide Commanders the opportunity to train on Mission Command in Unified Land Operations.

Potential Role: MCTP's role in scenario development and assessment, places them in good position to being including cultural understanding into their interoperability exercises. Based upon the findings of the recommendations, MCTP could also develop home-station training that involves an aspect of cultural interoperability, and can be conducted without necessarily having a specific international partner directly involved.



### **Joint Multinational Readiness Center (JMRC)**

The Joint Multinational Readiness Center, the Europe-based Combat Training Center (CTC) with a world-wide mobile training capability, trains leaders, staffs, and units up to Brigade Combat Teams(+) and multinational partners, to dominate in the conduct of Unified Land Operations (ULO) anywhere in the world, now and in the future.

JMRC provides a myriad of indispensable capabilities to the U.S. Army, our European allies and other partners. JMRC comprises fifteen separate Observer-Coach-Trainer Teams; the 1st Battalion, 4th Infantry Regiment (1-4 IN) which serve as Opposition Forces (OPFOR) during training rotations, and several support directorates to ensure world-class support to our rotations.



Potential Role: JMRC already provides training and exercises aimed at improving the integration, interoperability, and interdependence of Special Operations Forces and Conventional Forces from multiple partner nations. JMRC, and other centers like it, represents an arena in which cultural interoperability initiatives can be tested, verified, and trained to both U.S. Soldiers and international partners.



## Appendix A

The following diagrams are all taken from:

Hofstede, Geert. "Dimensionalizing Cultures: The Hofstede Model in Context." *Online Readings in Psychology and Culture* 2, no. 1 (2011): 3-26.

Ten Differences Between Small- and Large- Power Distance Societies	
Small Power Distance	Large Power Distance
Use of power should be legitimate and is subject to criteria of good and evil	Power is a basic fact of society antedating good or evil: its legitimacy is irrelevant
Parents treat children as equals	Parents teach children obedience
Older people are neither respected nor feared	Older people are both respected and feared
Student-centered education	Teacher-centered education
Hierarchy means inequality of roles, established for convenience	Hierarchy means existential inequality
Subordinates expect to be consulted	Subordinates expect to be told what to do
Pluralist governments based on majority vote and changed peacefully	Autocratic governments based on co-optation and changed by revolution
Corruption rare; scandals end political careers	Corruption frequent; scandals are covered up
Income distribution in society rather even	Income distribution in society very uneven
Religions stressing equality of believers	Religions with a hierarchy of priests

Figure 13. Differences between Small Power Distance and Large Power Distance.

Ten Differences Between Weak- and Strong- Uncertainty Avoidance Societies	
Weak Uncertainty Avoidance	Strong Uncertainty Avoidance
The uncertainty inherent in life is accepted and each day is taken as it comes	The uncertainty inherent in life is felt as a continuous threat that must be fought
Ease, lower stress, self-control, low anxiety	Higher stress, emotionality, anxiety, neuroticism
Higher scores on subjective health and well-being	Lower scores on subjective health and well-being
Tolerance of deviant persons and ideas: what is different is curious	Intolerance of deviant persons and ideas: what is different is dangerous
Comfortable with ambiguity and chaos	Need for clarity and structure
Teachers may say 'I don't know'	Teachers supposed to have all the answers
Changing jobs no problem	Staying in jobs even if disliked
Dislike of rules - written or unwritten	Emotional need for rules – even if not obeyed
In politics, citizens feel and are seen as competent towards authorities	In politics, citizens feel and are seen as incompetent towards authorities
In religion, philosophy and science: relativism and empiricism	In religion, philosophy and science: belief in ultimate truths and grand theories

Figure 14. Differences between Weak Uncertainty Avoidance and Strong Uncertainty Avoidance.

Ten Differences Between Collectivist and Individualist Societies	
Individualism	Collectivism
Everyone is supposed to take care of him- or herself and his or her immediate family only	People are born into extended families or clans which protect them in exchange for loyalty
"I" – consciousness	"We" –consciousness
Right of privacy	Stress on belonging
Speaking one's mind is healthy	Harmony should always be maintained
Others classified as individuals	Others classified as in-group or out-group
Personal opinion expected: one person one vote	Opinions and votes predetermined by in-group
Transgression of norms leads to guilt feelings	Transgression of norms leads to shame feelings
Languages in which the word "I" is indispensable	Languages in which the word "I" is avoided
Purpose of education is learning how to learn	Purpose of education is learning how to do
Task prevails over relationship	Relationship prevails over task

Figure 15. Differences between Individualism and Collectivism.

Ten Differences Between Feminine and Masculine Societies	
Femininity	Masculinity
Minimum emotional and social role differentiation between the genders	Maximum emotional and social role differentiation between the genders
Men and women should be modest and caring	Men should be and women may be assertive and ambitious
Balance between family and work	Work prevails over family
Sympathy for the weak	Admiration for the strong
Both fathers and mothers deal with facts and feelings	Fathers deal with facts, mothers with feelings
Both boys and girls may cry but neither should fight	Girls cry, boys don't; boys should fight back, girls shouldn't fight
Mothers decide on number of children	Fathers decide on family size
Many women in elected political positions	Few women in elected political positions
Religion focuses on fellow human beings	Religion focuses on God or gods
Matter-of-fact attitudes about sexuality; sex is a way of relating	Moralistic attitudes about sexuality; sex is a way of performing

Figure 16. Differences between Feminine Cultures and Masculine Cultures.

Ten Differences Between Short- and Long-Term-Oriented Societies	
Short-Term Orientation	Long-Term Orientation
Most important events in life occurred in the past or take place now	Most important events in life will occur in the future
Personal steadiness and stability: a good person is always the same	A good person adapts to the circumstances
There are universal guidelines about what is good and evil	What is good and evil depends upon the circumstances
Traditions are sacrosanct	Traditions are adaptable to changed circumstances
Family life guided by imperatives	Family life guided by shared tasks
Supposed to be proud of one's country	Trying to learn from other countries
Service to others is an important goal	Thrift and perseverance are important goals
Social spending and consumption	Large savings quote, funds available for investment
Students attribute success and failure to luck	Students attribute success to effort and failure to lack of effort
Slow or no economic growth of poor countries	Fast economic growth of countries up till a level of prosperity

Figure 17. Differences between Short-Term and Long-Term Orientations.

Ten Differences between Indulgent and Restrained Societies	
Indulgence	Restrained
Higher percentage of people declaring themselves very happy	Fewer very happy people
A perception of personal life control	A perception of helplessness: what happens to me is not my own doing
Freedom of speech seen as important	Freedom of speech is not a primary concern
Higher importance of leisure	Lower importance of leisure
More likely to remember positive emotions	Less likely to remember positive emotions
In countries with educated populations, higher birthrates	In countries with educated populations, lower birthrates
More people actively involved in sports	Fewer people actively involved in sports
In countries with enough food, higher percentages of obese people	In countries with enough food, fewer obese people
In wealthy countries, lenient sexual norms	In wealthy countries, stricter sexual norms
Maintaining order in the nation is not given a high priority	Higher number of police officers per 100,000 population

Figure 18. Differences between Indulgent Societies and Restrained Societies.

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