Bronislaw Malinowski, professor of anthropology, pictured in 1930.
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In *Advancing SOF Cultural Engagement: The Malinowski Model for a Qualitative Approach*, Robert Greene Sands and Darby Arakelian propose a special operations relevant model for engaging populations, illuminating their worldviews and values, appreciating their interests, and translating significant social, cultural, and political information into operational analysis. Their objectives are to introduce the core concepts, the base vocabulary, and the foundational skills in anthropology and sociology necessary for improving the human aspects core competency. While Greene Sands and Arakelian do not expect SOF to become anthropologists, they assert that Malinowski's population-centric research methods are desperately needed to make sense of contemporary human aspects of military operations.

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JSOU Report 18-2   Advancing SOF Cultural Engagement: The Malinowski Model   Sands and Arakelian

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JSOU Report 18-2

Joint Special Operations University and the Center for Strategic Studies

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Advancing SOF Cultural Engagement: The Malinowski Model for a Qualitative Approach

Robert R. Greene Sands and Darby Arakelian

On the cover. Kula Rings are traded throughout the Trobriand Islands, Papua New Guinea. PHOTO BY DAVID KIRKLAND/NEWSCOM

Back cover. Bronislaw Malinowski, professor of anthropology, pictured in 1930. PHOTO BY FLICKR

Contents

From the Director

Just returning from a London vacation and an opportunity to revisit the British Museum, it is serendipitous to read this monograph centered on anthropologist Bronislaw Malinowski, whose ethnographic collection from the Trobriand Islands in the early 1900s is displayed.

Robert Greene Sands and Darby Arakelian rekindle Malinowski's model, ostensibly to remind Special Operations Forces (SOF) that heavy reliance on technological processes to better understand or predict human behavior may lead to an under-analysis or under-utilization of some important qualitative aspects and perspectives. These two scholars offer clear recommendations for not only SOF to consider, but many Department of Defense, interagency, and nongovernmental organizations facing national and international cultural challenges or crises. We welcome your comments or assessment of their work.

Boyd L. Ballard
Director, Center for Strategic Studies

Foreword

In October 2016, the Joint Chiefs of Staff released the *Joint Concept for Human Aspects of Military Operations* (JC-HAMO) asserting that U.S. military tactical and operational successes over the past sixteen years of combat have not yielded corresponding strategic success. JC-HAMO attributes this failure to an overemphasis on defeating an adversary's military capability and an underappreciation of how an adversary influences the human and social dynamics of conflict. JC-HAMO is deliberately described as a mindset and approach requiring the Joint Force to engage in institutional and cultural change to create a human aspects core competency to effectively engage in twenty-first century warfare.

In *Advancing SOF Cultural Engagement: The Malinowski Model for a Qualitative Approach*, Robert Greene Sands and Darby Arakelian propose a Special Operations relevant model for engaging populations, illuminating their worldviews and values, appreciating their interests, and translating significant social, cultural, and political information into operational analysis. Their objectives are to introduce the core concepts, the base vocabulary, and the foundational skills in anthropology and sociology necessary for improving the human aspects core competency. Greene Sands and Arakelian have extensive experience working with the military and SOF students. Drawing upon their familiarity with the force, they bring to life an accessible, educational, and rich picture of how to advance the enterprise's capabilities through the story of Bronislaw Malinowski who, as an anthropologist in the early twentieth century, lived alone and unafraid amongst foreign and vastly different populations. While Greene Sands and Arakelian do not expect SOF to become anthropologists, they assert that Malinowski's population-centric research methods are desperately needed to make sense of contemporary human aspects of military operations.

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About the Authors

Dr. Robert R. Greene Sands is one of the foremost experts in cross-cultural competence (3C) and culture-general in the Department of Defense (DOD) and has worked closely with several DOD organizations to develop and deliver innovative blended learning programs in culture and language. Several iterations of his courseware have been utilized by Special Operations Forces (SOF), U.S. Army, U.S. Air Force, U.S. Marines, and foreign area officers, among others. Sands developed the first-ever Massive Open Online Course in 3C, Operationalizing Culture: Thinking Differently about Behavior in the Human Domain.
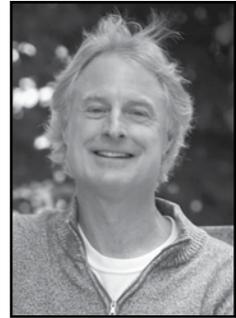
Anthropologist Sands is currently CEO of LanguaCulture, LLC and adjunct professor at Norwich University. His prior experience includes positions at Air University and Air Force Culture and Language Center, Defense Intelligence Agency, and Director and Senior Research Fellow at the Institute for the Study of Culture and Language at Norwich University and adjunct professor in the College of Graduate and Continuing Studies Program. Sands' research and writing is represented in nine books, three of them along with numerous journal and book chapters on various aspects of culture and language. He received his Ph.D. in anthropology from the University of Illinois.

Darby Arakelian, M.A., is a national security expert in strategic communications and audience analyses and segmentation. She was a member of the intelligence community, specializing in terrorism and counterterrorism, communications strategy and analysis, cyber warfare, and automated media monitoring and analysis. She is a former research fellow at Norwich University's Institute for the Study of Culture and Language and serves as coeditor of *The Journal of Culture, Language and International Security*. She earned her master's degree in security policy studies from George Washington University.

Acknowledgements

The authors would like to acknowledge David C. Ellis for his helpful comments and suggestions on the manuscript. Robert Greene Sands would also like to thank Thomas Haines for his sage wisdom on this topic as the manuscript took shape. Finally, Sands would like to acknowledge the many special forces students seeking their bachelor degrees that he has had the pleasure of teaching through Norwich University's Strategic Studies and Defense Analysis program in the last four years. The simple premise of this monograph is that SOF enlisted and officers have the ability and motivation to grow an organic capability in understanding and applying a qualitative approach and methods to their missions. If these students that have gone through Sands' classes reflect SOF capability, that premise is reachable. Their knowledge, skills, and experience do not make them Ph.D.s that can win bar fights, but critically-engaged and adept applied ethnographers that with the right social science foundation can excel in the social and cultural complexity that is now the new normal in missions and operations.

Introduction

The United States and its allies need to recognize the indications and warnings (I&W) of nascent threats far left of a problem and apply appropriate mitigation measures before they materialize into national or international crises. This monograph is especially useful for SOF such as intelligence analysts, civil affairs (CA), and military information support operations (MISO) personnel for whom the mission demands population-centric analytical skills and in-depth understanding of local social and cultural knowledge. *Advancing SOF Cultural Engagement: The Malinowski Model for a Qualitative Approach* can be of critical utility to operators who, over the course of a career, multiple deployments and assignments, will benefit from the transferable knowledge and skill-based competencies involved in a qualitative approach and methods advocated in this monograph. Neither the DOD nor the Services currently feature such organic education and training capability, and attempts at "outsourcing" this need (i.e. Human Terrain System [HTS]) have fallen short of actual mission requirements. This monograph strongly suggests that as "gray zone" activities and events increase in prevalence and importance to U.S. national security, developing this organic capability is an imperative for SOF, not a luxury.

Current fascination with the retrieval and management of what has been called "big data" to provide an intelligence and operational understanding of the behavior of adversaries, allies, neutral actors, and the many culture groups that make up the social and cultural "interactive space" of mission skews and even ignores critical understanding of how culture systems operate in locations with "real" groups. Ellis and Sisco point out that big data and technology solutions predominate intelligence tradecraft, but fail to deliver contextually rich population analysis."[1] The big data approach does not include the kinds of qualitative methods and perspectives that can offer valid and reliable social and cultural knowledge critical to the success of SOF-peculiar missions. Nor can big data provide key information to construct better I&W for future behavior.

> Tremendous investment has been directed toward technological solutions for operationalizing [such methods as sociocultural analysis – SCA] including "big data" and social media monitoring efforts.

> Unfortunately, these capabilities lack the rich, population-centric understanding required to develop baseline assessments, conduct qualitative and quantitative analysis, and produce strategic I&W.[2]

This monograph demonstrates why a qualitative approach is necessary for SOF and provides examples of research methodologies that can greatly improve intelligence gathering and rapport-building activities. In short, a qualitative approach promotes a nuanced understanding of the sociocultural factors in the human domain and, in turn, improves the likelihood that SOF activities will align with the interests and norms of the different target audiences in foreign areas. In the post-9/11 operational environment, culture and language are two key components for mission success when cultivating relationships with foreign audiences and partners in theater. In describing recent special forces (SF) efforts, a former Green Beret writes, "while U.S. Special Forces were trained and prepared as combat warriors, much of their work involved training, cultural understanding and psychological efforts to explain the messages of U.S. freedom and humanity."[3] The authors wrote this monograph precisely to enhance SOF capabilities to navigate in the cognitive space for which quantitative approaches alone are insufficient.

In *Advancing SOF Cultural Engagement: The Malinowski Model for a Qualitative Approach*, the authors build on Robert Greene Sands' 2016 JSOU monograph, *Assessing Special Operations Forces Language, Region, and Culture Needs: Leveraging Digital and LRC Learning to Reroute the "Roadmap" from Human Terrain to Human Domain*. Sands argues that current SOF language and culture learning efforts do not adequately prepare SOF personnel for the kind of mission and operations that constitute the backbone of deployed SOF engagement activities.

The authors recommend building a deliberate sociocultural capability for SOF to advance critical knowledge and skill-based competence beyond the level of language and culture currently provided to SOF in existing learning programs. This approach proffered here would embed with preexisting SOF Language, Regional Expertise, and Culture (LREC) learning programs the development of a graduated program of qualitative methods and skills. Key to this capability would be the incorporation of a theoretically-informed ethnography, a set of methods that are centered on participant-observation of the "fieldworker." Sands defines ethnography as a qualitatively-oriented array of data gathering methods. An exploration of ethnography will follow

later in this monograph. A deeper and more authentic presentation of different culture groups' realities is critical to framing and undertaking an on-the-ground identification and analysis of existing and projected behavior in population-centric operations and missions. Such a presentation of local reality can only be accessed through methods that incorporate ethnographic and other sociocultural approaches where the researcher and the change agent are one and the same. More than a century ago, Bronislaw Malinowski pioneered many of the methods from which SOF could benefit. It is to his story we now turn.

Chapter 1. Malinowski: Alone and Unafraid

> The anthropologist must relinquish his comfortable position in the long chair on the veranda of the missionary compound, Government station, or planter's bungalow, where, armed with pencil and notebook and at times with a whisky and soda, he has been accustomed to collect statements from informants. … He must go out into the villages, and see the natives at work in gardens, on the beach, in the jungle; he must sail with them to distant sandbanks and to foreign tribes.[4]

There is a growing realization that contemporary U.S. military missions will play out in a messy, chaotic, culturally-complex, unstable, unpredictable, and morally ambiguous operational landscape. The operating environment characterized by Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF), and now prevalent in conflict globally, is a stark departure from conventional, Cold War warfare. Current and near future U.S. security strategy will depend increasingly on population-centric operations and the approaches developed during counterinsurgency (COIN) carried in OIF and OEF. SOF will undoubtedly feature prominently in this growing struggle for influence in the human domain.

The 2016 SOF Operating Concept white paper identifies the human domain as an essential component of mission success. It states:

> In an increasingly interconnected world, a broadening array of state and non-state actors employing irregular and hybrid approaches challenge U.S. interests. Identifying activities and intentions of these malign actors within disordered societies and disenfranchised populations is challenging, but not impossible. To achieve this, persistent operations and deep understanding of the human domain will be necessary to identify and influence relevant actors to produce outcomes acceptable to the United States.[5]

The white paper suggests that many core SOF activities essentially require confronting adversaries by cultivating allies and partners with whom the United States shares strategic interests. The immediate and long term success

of SOF will be built on "a deeper understanding of the environment to see and act ahead of flashpoints of instability, inform the development of U.S. options, and reduce operational and strategic blind spots."[6] In other words, if SOF are to discern and correctly interpret evolving conditions and respond with the appropriate activity, they need to be actively and persistently engaged in social and cultural environments throughout the world. They will need to align their actions and relationships with an ever-changing constellation of local culture groups who are, or could be, partners to recognize the flow and pace of social and cultural behavioral changes. Such a posture would allow for the detection of small or seam splitting changes in an era of cross-cultural complexity, enabling "leadership to make informed decisions, exploit opportunities, and employ appropriate preventative measures. This process creates the strategic space necessary for our Nation to develop and implement effective policy."[7]

The United States Army Special Operations Command's *Human Factors Considerations of Underground Insurgencies*, first written in 1965 and revised in 2013, offers a more detailed look at the human domain. Human factors are defined as "psychological, cultural, behavioral and other human attributes that influence decision-making, the flow of information and the interpretation of information by individuals or groups at any level in any state or organization." Probing beyond this conceptual perspective, *Human Factors* suggests that "understanding a population's support or rejection of such [insurgent] movements requires understanding of a broad set of political, economic and social factors, and often requires an understanding of how individuals respond to oppression, violence, or terrorism."[8]

Both the 2016 SOF Operating Concept and *Human Factors* reflect the DOD's general approach to the human element, which typically frames the range of human behaviors through the truncated or narrowly focused lens of military end-states. Though a significant focus of military involvement with 'cultural others' may not involve warfare, conflict, or conventional missions, the DOD has difficulty interpreting the human element through existing core activities, doctrine, and operating perspectives. This is also apparent in the SOF Operating Concept white paper where there is no mention of a need for underlying intimacy with local social and cultural knowledge and behavior other than that which immediately affects or pertains to mission objectives.

Unfortunately, by labeling, defining, and viewing the human element through traditional military lenses, the force amplifies at its own peril the

cognitive assumptions and biases underlying its military goals and its vision of success irrespective of whether they align with local perspectives. The first casualty of this cycle is often the accurate and authentic appreciation of social and cultural reality that could greatly enhance mission planning and activities. This restriction of focus or lack of motivation to stretch understanding of knowledge and behaviors beyond strategic and operational boundaries effectively limits the understanding of how human behavior is conceptualized and the development of an accurate and authentic cultural reality of others. In other words, labeling, defining, and describing the human element and behavior through traditional military means, or even utilizing concepts developed for military action, affects the bias of military organizational goals and the essence of success.

When cognitive biases go unmanaged, the result is a reduced ability to effectively elicit, analyze/apply, and act on meanings of behaviors that form others' social cultural realities. More to the point, how we think is just as important as what we are thinking. How we think about others who are different from us, in terms of beliefs and behaviors and cultural expressions (e.g., family/kinship, law and order) and governance, is even more critical to SOF now that the human domain is featured so prominently in the operating concept. Mission success depends on the ability of SOF to overcome cognitive biases to achieve the advanced understanding of foreign groups' interests and behaviors to both influence them and forecast their future behaviors.

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Former Director of National Intelligence James Clapper outlined in his 2016 Worldwide Threat Assessment of the U.S. Intelligence Community given to the Senate Armed Services Committee, that a complicated regional, national, and global terrorist landscape,[9] terrorism, and an increased threat posed by a resurgence of foreign powers such as Russia and China, combine to create a complicated tableau of state and non-state actors that intersect in culturally dense ways promoting a complexity that cannot be solved or even overcome without a strong understanding and engagement of cross-cultural capabilities. Looked at differently, the forays of these actors

into foreign lands also creates opportunities for the U.S. to influence their decisions as they become dependent upon diverse populations they are also unlikely to understand.

The thesis of this monograph is that SOF can develop a more theoretically-sound understanding of culture and develop the cross-cultural skill-based competencies to better collect, analyze, and apply social and cultural behavior by employing a qualitative approach to revealing a population's Theory of Mind (TOM). Briefly, a TOM is a way of expressing a population's worldview, norms, values, ethics, and corresponding cultural practices, but the concept is elaborated upon subsequently. As it currently stands, SOF lack a program of instruction dedicated to mitigating the cognitive and perceptual biases that impede the force's ability to appreciate foreign perspectives. While SOF, and DOD more broadly, have gone through stages of sensitivity to, or perhaps acceptance of the importance of cultural knowledge and skills, the authors argue that a further significant "pivot" is necessary. The pivot advocated in the pages that follow is toward a qualitative, ethnographic approach that fits naturally with many SOF core activities.

Mission Parallels a Century Apart

Within this context, anthropologist Bronislaw Malinowski offers a relevant model for advancing SOF social and cultural intelligence and cross-cultural engagement capabilities. He arrived alone in the scarcely explored South Pacific Trobriand Islands to conduct three years of fieldwork as WWI raged across Europe and elsewhere. Malinowski was part of a cadre of early anthropologists (mostly Europeans) who traveled to distant foreign lands to study primitive societies and demystify their cultural exotica while scientifically testing out grand theories of humanity. Like immersion experiences foreign area officers have when first discovering a country, the people, and the security apparatus, Malinowski and his kind left the comfort of academia and their familiar societies. He, like his colleagues, traveled thousands of miles for months to field locations in far-flung foreign lands because secondary and tertiary travelogues, posts from colonial administrators, interviews with travelers returning from foreign cultures and other sources of data could not stand in for experiencing "native" society and behavior in person.

His work and experience serve as a model for appreciating, and then building, a solid foundation of cultural understanding, access, and rapport

with foreign populations, and he pioneered the appropriate methods for ferreting out the kind of information that SOF today would find critical for mission and operational success. Malinowski's years of fieldwork offer intriguing insights and parallels for SOF as they prepare for complex and newly encountered roles in the current and future uncertain and complex international and transregional threat landscape.

Today, the mission is not to rule and administer over foreign populations as colonial powers did, and as early anthropologists did in support of colonial administrations. Much to the contrary, the mission is primarily to build partner capacity to govern effectively and legitimately with as little external support as possible. Yet, the requirement to appreciate local conditions, relationships, and patterns of life remain remarkably similar. Modern incarnations of the anthropological requirement include concepts like the Human Terrain (HT), the Human Domain (HD), sociocultural analysis, gray zone, and Human Geography among others. However, as will be shown, these concepts bring cognitive and operational biases that often work against what Malinowski was trying to uncover. In the end, the contemporary mission requires deep insight into population dynamics for which superficial language and culture-specific knowledge such as etiquette-based cultural training, prove inadequate.

Malinowski understood that to effectively study the nature and operations of cultural and social systems of a foreign population, he had to step "off the verandah"[10] and leave the proverbial thatched hut or the pitched tent of the anthropologist and venture into the heart of "native" everyday society. He was one of the first anthropologists to actively become part of the culture's "space and place" to collect valuable and meaningful field data. Malinowski's participant observation methodology pioneered what later became ethnography—the intimate and qualitative fieldwork method that has been the hallmark of anthropology and, more recently, other social sciences. Par-

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ticipant observation establishes the authority of the data gathered by the fieldworker and enables, through an extended period of both observation and participation, the exploration of the various contexts of meanings. This

Figure 1. Bronislaw Malinowski sits with natives on Trobriand Islands in 1918.
PHOTO BY WIKIMEDIA COMMONS/PUBLIC DOMAIN.

method includes interviewing key informants, sometimes referred to as gatekeepers, or in military parlance, key leader engagements. Introductions to informants result from extended interaction with community members. Participation and observation provide the ethnographer checks and balances on what has been recounted by others, ensuring another filter of validity (validity is addressed in chapter 6).

As one of the very few Europeans in the archipelago, Malinowski was often the only European (white man) islanders had ever seen. He was constantly in a state of observation and on frequent occasions participated in everyday Trobriand life, living as a kind of "Trobriand shadow"—having one-on-one and group discussions, afternoon walks, taking part in celebrations and accompanying islanders on fishing expeditions. Rather quickly, Malinowski learned the language, which allowed him even further access into the daily swirl of Trobriand society. Malinowski was insistent that anthropologists must have daily contact with their informants if they are to adequately record what he referred to as the "imponderabilia of actual life"[11]—the kinds of data that could yield identification of patterns of Trobriand behavior, also reflected in their symbols and artifacts. These patterns would ultimately aid Malinowski (along with future anthropologists and

social scientists) in demystifying the workings of economic, political, religious, and kinship systems. Malinowski's experiences are striking in similarity to the kinds of social and cultural experiences that have been described more recently in Village Stability Operations (VSO) and that were in high demand in recent foreign internal defense (FID) and COIN operations.

Malinowski believed that the goal of the anthropologist was "to grasp the native's point of view, his relation to life, to realize his vision of his world."[12] To that end, he was interested in behavioral similarities and differences displayed by the local population. He noted that repetition, or similarities, tended to support things important to everyday life, whereas differences signified something special. He was particularly interested in how interactions among villagers revealed a behavioral code of cultural importance—what SOF now understand as governance norms.

The need to replicate scientifically the cultural other's worldview depended on the duality of fieldwork method: observation and participation. Malinowski's peer group of anthropologists was trained in this qualitative scientific approach. To the classically-trained anthropologists, the ethnographer could work through the scientific method to expose the native's cultural reality using a process of behavioral validation of observation (and verification through active engagement of cultural other) and participation. If Malinowski could participate as a Trobriander in Trobriand daily and ceremonial life, building and sustaining relationships and predicting future behavior, then his view of their cultural reality would map accurately to the islanders.

Malinowski saw what he did as the "science" of human behavior. In this scientifically detached perspective, the ethnographer was often the silent stenographer of cultural reality that was faithful to the islanders. Today, there are anthropologists and social scientists who subscribe to a postmodern perspective and argue that, due to the nature of social and cultural behavior and how the meaning of that behavior is accessed and interpreted by the "ethnographer," describing a qualitative approach as "scientific" is a misnomer. However, most of the social and behavioral sciences view a qualitative approach and methods as one means of scientific inquiry. In this book, methods such as ethnography provide access to the validity and cultural authenticity of what the ethnographic "stenographer" and cultural interpreter can provide to organizations such as SOF in discerning cultural reality.

Applying the Malinowski Model to SOF

SOF are responsible for a range of missions that require the ability to discern and decipher local behavior and meaning to better inform their activities. Recent FID campaigns in Afghanistan and Iraq, COIN activities in Iraq, and irregular warfare (IW) missions, such as VSO in Afghanistan, demonstrate the continuing relevance of cultural knowledge to SOF. The utility of language and culture has long been part of SOF development and preparation. However, identifying "culture" as important does not guarantee that those elements are embedded in learning programs.[13] For SOF, whose missions are often accomplished over an extended period with a variety of culturally complex groups, preparation requires a more in-depth learning program in cross-cultural capability than what is currently offered. A revised program would include greater emphasis on the means to decipher local cultures and the cross-cultural skills to form and sustain relationships necessary to elicit sociocultural data, which can then be applied to more nuanced future strategy and operations.

SOF require an approach that promotes more effective and representative use of sociocultural data and that introduces the value of establishing and understanding local core beliefs as relevant to intelligence gathering and interpretation. They would greatly benefit from developing and implementing a "thinking differently"[14] capability that makes them better sociocultural intelligence gatherers "in the field," to successfully handle cultural complexity, and to make more culturally-informed decisions. For example, to influence populations important to local stability and bolster their resilience against insecurity and terrorism, it is critical to comprehend the nature of the core beliefs and values that motivate individual and group behavior that then offer potential courses of action to assist in building platforms and programs to resist threat actors.

To reveal a population's TOM, the Malinowski Model consists of three elements: (a) the methods utilized in participant-observation "packaged" broadly as ethnography; (b) the attitude of the participant-observer that promotes a cognitive approach to cross-cultural competence that mitigates social and cultural bias, promotes effective perspective-taking, and effectively engages active learning, and (c) a process of ongoing hypothesis testing through cross-cultural communication to determine validity, reliability, and authenticity of the perceived social and cultural reality. Together, these

elements infuse deep sociocultural insights into intelligence, mission analysis, and operational planning.
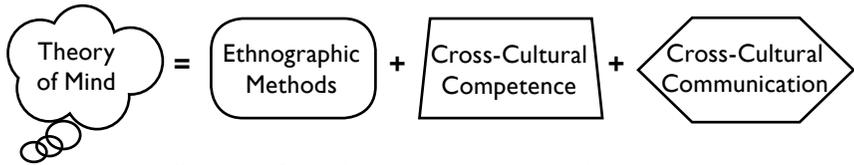
Figure 2. Overview of the Malinowski Model.

The Malinowski Model provides SOF an essential ethnographic skill-set and toolkit for navigating through, collecting data on, and aggregating analyses on culture groups who comprise a local population. This monograph explores in detail elements of ethnography as it applies to SOF and their missions. Briefly here, the Malinowski Model considers the general ethnographic approach first utilized by Malinowski in his fieldwork, and for the most part, is reflected in the disciplines beyond anthropology that have now adopted ethnography and more generally, qualitative methods of inquiry and discovery. At its core, the success of the ethnographic method depends on extended and meaningful participant-observation by the ethnographer, the systematic capture and recording of qualitative data through field notes, notes and transcripts from informal to formal interviews, photographs, charts and maps of social interactions, as well as representations of cultural and natural landscapes, and more. The method also depends on the continual process of data validation exposing social and cultural reality by the fieldworker through observation and active engagement of local inhabitants. The Malinowski Model considers how ethnography can best be applied in intent and method to better facilitate the SOF mission.

Good ethnography is an iterative process. It involves situating or embedding in the local social and cultural landscape and building meaningful relationships with individuals and groups. Ethnography demands an academic and interpersonal patience to establish effective relationships with local individuals and culture groups involved in missions. Participant-observation is the primary data gathering method in ethnography, and these relationships, through participation in and observation of local social interactions, will be critical to eliciting social and cultural knowledge necessary to construct an authentic and valid social and cultural reality. Over time, ethnography, if appropriate methods are used, will reveal a deeper understanding of behavior

and motivations of behavior of the local populations. In essence, the longer in the field and the greater and more in-depth the development of relationships, the more accurate and authentic the knowledge elicited is and the perception of the local reality. Ultimately, a synthesis of the data will provide a solid foundation to build accurate prediction.

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The success of the Malinowski Model depends on developing skill-based competences that are critical components of cross-cultural capability that serve to provide a solid learning foundation to support the model. These competencies provide the ability to learn and apply cultural knowledge and develop the capability to engage interactional skills to sustain, as well as solicit, critical social and cultural reality of those individuals or groups important to mission success. The qualitative approach, such as the Malinowski Model, is based on the recognition that human cognition, or thinking, especially as it involves people and groups that may be socially and culturally different, rests on the ability to perceive others' social and cultural reality. The authors refer to this capability as TOM. Chapter 2 will explore components of cross-cultural capability and how it supports TOM before moving on in the following chapters to introduce more specific elements of the Malinowski Model.

Reframing the Culture Concept

In addition to advocating for the Malinowski Model, this monograph suggests that a reframing of the more traditional construct of culture is critical to understand the contemporary local actors and social and cultural lay of the land that SOF must comprehend and engage within. Culture is not a bounded unit that corresponds to geography; culture can be conceptualized as patterns of peoples' behavior (activities, actions, and, inferable from these, their thinking). These patterns, and what they mean to those who share them, underlie and motivate all human activity across the spectrum of behavior, including how they govern, worship, defend the group from external forces and each other, connect to the past, mobilize to face natural and human-made crises, and adapt to face adversity.

These patterns are not static and unchangeable; they are malleable to outside conditions and influences, both human and natural, and thus are always in a state of flux from what people do daily and/or how they adapt/adjust to these outside conditions and influences. If enough people adjust or stop reinforcing these patterns of behavior, they will eventually change or taper off and cease to exist. Even when things are consistently reinforced, they almost always accumulate changes over time, resulting in notable changes in behavior—"anyone who tells you that a culture 'hasn't changed for 1000 years' just isn't paying attention."[15] In fact, Michael Agar writes about cultures as "open, dynamic systems co-evolving in their environment, complex systems on the edge of chaos [and within the human domain]."[16] The reality is that culture, or these meaningful patterns of behavior, is used to identify a group of people and the system in which they live. On the ground, there is no cloud of culture floating around influencing people's thinking.

People tend to use these patterns of behavior as a Leatherman multi-tool. When presented with a new situation or a crisis, they pull out their Leatherman and try to find a blade or a tool to help them deal with it—consciously or unconsciously. This can produce some connections that seem odd. For example, when a group feels itself under threat of coming apart, people may start reinforcing a religious or ethnic identity to keep people feeling connected to one another, even if the actual reason for the problem is economic, political, or something else. To start to probe a population's meaning of behavior, it is critical to describe and comprehend its beliefs and values, social structures, religious institutions, economics, and politics. Yet, being able to see beyond one's own conceptual categories to digest what people are doing and why, is necessary for a more useable and representative approach to understanding the operating environment.

At the heart of culture group affiliations are core beliefs. To the authors, these beliefs act to anchor a group's behavior, offer means to adapt behavior to external forces, and when necessary, change to fit the need.[17] As groups of people face extraordinary human and natural forces and threats, they utilize all cultural facets to adapt to survive. It is hard for SOF to appreciate and grasp the implications of others' behavior because SOF typically do not face the extraordinary influences to the degree felt by those cultural groups that are of interest. Consequently, there is little to no experience to draw upon to help with understanding. Now, add in the complications to forecasting future behavior based on high-risk security areas featuring instability,

insurgency or COIN, and terrorism; everything discussed thus far about "culture" comes into play when attempting to understand and interact with local cultural groups.

Chapter Outline

The Malinowski Model stresses that what is "seen" as culture, is just the patterns of people's actions, interactions, and thinking. This is the main point of departure for the focused emphasis on a qualitative approach advocated here to advance SOF cultural engagement research, training, and analysis. All societies contain cultural and subcultural groups that form around shared and distinct patterns of behavior connoting meaningful differences between them. Some may be long lasting, temporary, or intermittent, but all exist as a means by which people make their way through their daily and more long-term existence. If one knows or observes the patterns of behavior, over time, meaning will follow, and after that, a general understanding and familiarity that can lead to knowledge best suited to help understand potential future actions. If SOF can understand potential future actions, they can drastically improve efforts to influence the culture groups with whom they interact.

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With the Malinowski Model, SOF can better differentiate the collection of groups or populations that make up the human domain by deconstructing what motivates their behavior. They can also determine what drives their associations with the recognition that these associations can be temporary, as well as enduring. SOF must comprehend historic trajectories of these groups and consider the power of contemporary forces of technology, the Internet and other means of instantaneous connectivity. Basically, there is the need to understand context and the forces that shape identity. This is the true value of the Malinowski Model described in the following pages.

Even the best-detailed ethnographic data loses value if interpreted primarily through the cognitive biases of the analyst. Recognizing and mitigating the effects of cognitive bias demand a holistic ethic of discovery and analysis, which, as will become apparent, is a difficult task. At a minimum,

understanding the source of cognitive bias enables those engaged with foreign populations the means of self-reflection to better capture the reality as lived by the population.

The following chapters lay out the case for a qualitative approach to promote SOF mission success. Chapter 2 introduces the Malinowski Model as an example of the kind of field-based methodologies that can serve as a force multiplier for many SOF activities. This chapter will introduce the concept of TOM as essential to the success of qualitative approaches, but specifically the Malinowski Model.

Chapter 3 provides an exploration of cross-cultural capability that undergirds the Malinowski Model. The success of the Malinowski Model depends on developing skill-based competences that are critical components of cross-cultural capability that serve to provide a solid learning foundation to support the model. These competences provide the ability to learn and apply culture knowledge and developing capability to engage interactional skills to sustain, as well as solicit, critical social and cultural reality of those individuals or groups important to mission success.

Chapter 4 reviews the main research methods SOF can use in the field for applied ethnography. The chapter explains the extraordinary value of a qualitative approach to SOF missions with the objective of helping SOF reveal local population core beliefs. Chapter 4 rounds out the discussion on how to reveal a population's TOM in practice.

Chapter 5 addresses the impact of bias on the Malinowski Model. The authors suggest that adopting a qualitative approach and corresponding methods requires more than just "training in" another battlefield skill; understanding foreign human behavioral complexity first necessitates the mitigation of cognitive biases and biases deriving from cultural differences. The chapter offers a brief introduction to human cognition through the lens of "fast and slow" thinking processes. Biases are an unintended result of human thinking, and, in matters of understanding and predicting behavior of culturally different others, biases can distort how behavior is interpreted. Organizational bias also distorts how foreign populations are perceived based on schemas and operating doctrine. The HT and HD schemas are reviewed to illustrate how organizational biases limit SOF ability to appreciate local population dynamics.

Chapter 6 identifies the means to assess the effectiveness of the Malinowski Model. In social science, reliability and validity are a product

of accessing and understanding an authentic representation of social and cultural reality of individuals and group, as in the case of SOF, that are involved in missions. The chapter explores the limitations of the Malinowski Model when it comes to assessing data, while offering ways to provide a necessary approach and methods critical to mission success when dealing with cross-cultural complexity.

Chapter 7 explores the evolution of DOD and SOF cultural education and training. It identifies strategic stages and pivots that have occurred in the last half century along with the inconsistent and largely ineffective development of a language and cultural program of skills and knowledge. The latest stage entails both kinetic, quick strike capability and building partnership capacity (BPC) in critical security areas. The importance of BPC, in addition to the recent pivot to COIN, highlight the critical importance of developing a more robust qualitative approach. Chapter 7 offers an outline of how SOF might produce such a qualitative, ethnographic capability.

Chapter 2. A Field-Based Method for SOF

> We at NGA used to look for things and know what we were looking for. If we saw a Soviet T-72 tank, we knew we'd find a number of its brethren nearby. Now, though, we're not looking for things. Instead, we're looking for activities or transactions. And we don't know what we're looking for.[18]

Malinowski stressed that good anthropology involved "seeing life through the eyes of the native"—a goal that can produce dividends in cultural understanding, but also one fraught with cognitive pitfalls for the observer. The goal is to defuse or mitigate the impacts of cognitive and cultural biases. An observer's existing mental models, or schemas, are influenced both by personal worldviews and experiences and a host of organizational constraints—in the case of SOF, those endemic to military doctrine and activities. Many contemporary events resist traditional structured analysis due to the universe of variables influencing group behavior, the pace of structural change, the lack of analyst expertise in or experience with foreign populations, and the persistent but unconscious cognitive biases intrinsic to analysis in the absence of deep social and cultural appreciation. Though the U.S. military is now more comfortable acknowledging that the HD is crucial and that the U.S. perspective may not capture others' realities, it has struggled to move past its own schemas to better capture the human behavior that reflects others' beliefs, values, and motivations.

The Malinowski Model serves as both a skillset and toolkit for SOF to navigate around the immutable human flaw of cognitive bias and move past it through dedicated application of qualitative research methods. In this chapter, the authors explore how developing and applying "thinking differently" skills as a baseline necessary for understanding, seeing, and building a repository of meaningful patterns of behavior can be effective in contending with unique, novel or surprising situations in missions and operations.[19] "Thinking differently" is useful in building a universal social or cultural frame that helps gather, interpret and analyze data, and then apply it to future relations.

Whether in a Special Warfare or humanitarian assistance (HA) context—or even forecasting the impact of a direct action (DA) strike—SOF are increasingly filling the roles of social and behavioral scientists responsible for building enduring partnerships while always being observant and cognizant of patterns of behavior that could aid future interactions. Contemporary missions now demand advanced cross-cultural skills and methods for collecting, interpreting, and making sense of social and cultural behavioral patterns necessary for identifying potential I&W of future events. For this, SOF require skills and tools for discerning a population's social and cultural reality, the foundation for the Malinowski Model, and the concept that underlies efforts to mitigate cognitive and organizational biases. Furthermore, accessing this reality can be attributed to the concept of TOM, which is the quality of inferring the intentionality of others. The ability to discover another's TOM advances the notion that humans have developed cognitive skills to assign mental states to others and then use those states to explain and further infer/predict the actions of others.[20] Following this train of thought, there is a cognitive capability or competence that assumes that the actors under study are "intentional agents." This assumption then allows the observer to interpret another's thoughts through the expression of beliefs, desires, and emotions.[21] While Malinowski did not use the term TOM, it is a useful concept for interpreting what he meant by "seeing life through the eyes of the native."

The Kula Ring and Malinowski's Attempt to Explain a Theory of Mind (TOM)

One cultural practice of exchange confounded Malinowski, and it was not until he became a participant that he fully realized its significance across Trobriand Island society. The *Kula Ring* was a traditional exchange of shell beads and necklaces between partners that resided throughout the archipelago. The trinkets carried with them legacies of alliances and partnerships, stories that bonded partners together and offered networks that existed across time and space. Periodically, Kula expeditions were launched in seagoing canoes amidst great ritual to other islands and the bead and shell necklaces were exchanged and alliances solidified.

Malinowski, trained in economics, was intrigued by the Kula Ring and the economic and ritual experience in which all male Trobriand Islanders

participated through their lifetimes. Much time and ritual was invested in the Kula exchange between and during Kula expeditions. However, the expeditions carried with them a system of economic barter and exchange that occurred during the visits and was an integral element to the economic life of the archipelago. Malinowski traveled on several of these inter-island exchanges. Although the Trobrianders were expert seamen, each Kula voyage engendered risk and Malinowski noticed that ritual increased significantly before and during these open water voyages. This led

However, the expeditions carried with them a system of economic barter and exchange that occurred during the visits and was an integral element to the economic life of the archipelago.

Malinowski to speculate that one of the functions of religion and associated ritual was to handle the uncertainty of human existence.

Malinowski was convinced that the detached and scientific objectivity of an ethnographer promoted an objective and "true" cultural reality—one that perhaps eluded the comprehension of the islanders, or the cultural other. Malinowski believed that it was difficult for the Islanders to make the connections to the Kula as a functioning and orderly system that was part of a larger, integrated society. The islanders could only ascertain those rules and rituals that maintained the immediate sustainment of the traditional behaviors. It was up to the ethnographer, given his or her perch and perspective and understanding of the science of human behavior, to construct the big picture of the functioning society.

> The integration of all the details observed, the achievement of a sociological synthesis of all the various, relevant symptoms, is the task of the Ethnographer … the Ethnographer has to construct the picture of the big institution, very much as the physicist constructs his theory from the experimental data, which always have been within reach of everybody, but needed a consistent interpretation.[22]

The example of Malinowski's explication of how the Kula Ring functioned to the participants, as well as to Malinowski, also reinforces the value of critical discovery of cultural systems, such as exchange and how it operates in the cultural reality of the Trobriand Islanders. Also, this level of understanding sheds light on how exchange is implicated deeply in other elements

of culture, or as discussed, patterns of behavior. It is not an understatement to advance the importance of this understanding to the SOF mission.

Malinowski's treatise, *The Argonauts of the Western Pacific*, is a masterful and critically-acclaimed description and elucidation of Trobriand island society and was integral to supporting Malinowski's theory of the development and workings of human society. His insistence on recreating cultural reality inspired by the islanders through ethnography was the blueprint for many future anthropological field studies. Malinowski's classic work contained the first formal primer on ethnography and outlined three essentials of fieldwork:

a. operate under good scientific aims,

b. live with the natives, and,

c. use reliable and sound data-gathering techniques.[23]

Essential to the development of context for Malinowski is the duality of fieldwork—observation and participation. The ethnographer operated in a living laboratory where the exotic permitted flexibility of research design, and promoted the scientific applicability of anthropology and its method. Malinowski's three "fieldstones" for successful ethnography still resonate as a blueprint for those who work with and/or in foreign cultures and can apply more to those in operations and missions where discerning foreign behavior is critical for success. His distinction between description and analysis, and the perspective of cultural others and the objective view of analysts, resonates well with comparable missions of FAOs, attachés, SOF, and intelligence professionals. Extrapolating and applying a well-informed perspective of others' TOM, along with its correlated behavior, are critical for informing future strategy and operations. Malinowski was primarily concerned with an island culture that was connected across the ocean by kinship, trade and alliance, and spirituality, organized in their own formalized religion, but his search for meaning in patterns of behavior stretched him to apply his considerable local knowledge to attempt to answer more universal questions of what it means to be human.

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Recognizing Perspective

> That's the real cultural question. Do I do it through my prism, or did
> I try to understand another prism which will give me more clarity
> and [bring me] closer to truth?[24]

Malinowski traveled in sea-going canoes across the Trobriand archipelago with the Islanders to see first-hand how the exchange of goods and services were interwoven with the Kula Ring. There were elaborate ceremonies and rituals prior to these open-ocean journeys that Malinowski concluded were elaborations of their spirituality. However, when canoes were utilized for travel within the Island, or in fishing in the lagoons or close to shore, there were no rituals or ceremonies to mark the beginning or end of the trip. After taking part in many of the open-ocean journeys as well as those close to shore, Malinowski could tease out motivations as well as the meaning of the ritual behavior. Certainly, offering magic and appealing to other forms of supernatural assistance to make better Kula deals were part of the ceremony. But what was more enlightening to Malinowski, and later anthropologists, was the fact the ritual only preceded journeys where there was much risk and uncertainty associated with open-water crossing.

Malinowski put himself in a place through his ethnography where he could discern meaning from behaviors, and engender an understanding of those beliefs, or the lattice of a worldview, that motivated such behaviors that would not have been apparent or visible to an outsider. Just as critical as place was Malinowski's ability to intentionally ascertain and share the thinking processes of the Islanders, to be able to peer into their reality, while also engaging analytical efforts to extract the "meaning" of meaning.

Humans have evolved their cognition as an interface—an interpretation—between their surrounding physical, social, and cultural environments, and their own agency. This interface is expressed through a lens, or worldview, or a set of assumptions which influence perception. "Worldviews are prone to stability; they are entrenched in society through formal and informal socialization, the power of traditions, ideology, and other mechanisms."[25] The key components are interlocking core beliefs—ideas held to be true by both the individual and the group. Beliefs compel individuals and groups to act in certain ways so that, if the system of beliefs, reflected in patterns of behavior, were more fully known and understood, the understanding would

lend itself to forecasting the type of interaction and behavior involved in a situation, and how situations would evolve over time.

To mine the available wealth of core beliefs, SOF must cultivate relationships with cultural gatekeepers to create and sustain flows of information. Malinowski was not in the Trobriand Islands as a short-term, transactional agent, paying out good will to gain a momentary or fleeting advantage and then to leave. Malinowski's lengthy stay in the field allowed him access to an authentic and critically-informed understanding of their social and cultural meaning. All through this process, Malinowski had to gain, then sustain, partnerships by establishing trust and ensuring rapport through acts of reciprocity with the Islanders. As a result, Malinowski was able to access Trobriand social and cultural knowledge in an authentic and nuanced way. More generally, he discovered the Trobriand worldview.

Worldviews and beliefs act to define in- and out-groups, or the 'Us versus Them' dynamics instantiated through the influence of cultural schemas. Human groups align with those who look and act similarly and keep those different or unfamiliar in abeyance and confined in an interactional space defined by at least caution, if not outright hostility. The upshot of this is humans consciously and unconsciously discern difference and use it to order their interactional environment.

Group behavioral indicators maintain that separation through deeply ingrained behavior referred to as ethnocentrism—the tendency to twist judgment of others in favor of internally followed beliefs [and behavior] and against foreign alternatives.[26] Ethnocentrism may also be the human way of establishing and upholding moral beliefs. Ethnocentrism structures relationships with other groups in deeply profound ways, even if social interaction is not cast in the present or reflected in face-to-face interactions. The effects of ethnocentric biases in the intelligence process are well understood, but the influence of ethnocentrism on daily thinking patterns is rarely addressed as it plays out more generally for the analyst.

Tomasello, Carpenter, Call, Behne, and Moll in their TOM suggest that an inherent social facet of thinking is cultural cognition—the cognitive ability that leads to divining others' intentions and then aligning them to a shared intentionality for future activities.[27] "Participation in such activities requires not only especially powerful forms of intention reading and cultural learning, but also a unique motivation to share psychological states with others and a unique form of cognitive representation for doing so."[28] Enhancing

and sharpening these skills are especially critical for SOF, who work directly with others to promote mission success.

The TOM concept promotes a social and cultural familiarity that allows one's schemas to project a sense of cognitive validity that can apply to others. One can intuit the social imperative to strengthen in-group participation and understanding cultural schemas, but this also introduces errors in cognition when applying the same schemas to those who are different. It may seem intuitive that people can know and possibly forecast the behavior of those closest to them (e.g., extended family and friends or work colleagues) because familiarity gives them a closer model to hew from.

In population-centric activities, a major intelligence focus should be discerning social and cultural reality through individual and group perspectives. Beliefs, values, and behaviors of extended kin groups, tribes, ethnicities, and even nations different from those of the collector require different and necessarily divergent ways of thinking about the world. When prompted to think like them and act like them, the collector's own way of viewing the world gets in the way when he or she lacks the local population's worldview. Individuals readily, and usually unknowingly, remain mired in their own conclusions looking for supporting evidence and engaging in confirmation bias while ignoring contradictions to their first impressions. Individuals pride themselves on their intuitions—"it is hard to back track and change opinions."[29] These biases interfere with establishing and sustaining critical relationships with foreign intelligence sources while bias can extend to strategic (future) analysis.[30]

> *When prompted to think like them and act like them, the collector's own way of viewing the world gets in the way when he or she lacks the local population's worldview.*

Anthropologist Rob Johnston, a CIA analyst and author of an ethnography of the intelligence community, finds failure in intelligence analysis due to ethnocentric tendencies and powerful unconscious influence of the analyst's own "cultural" logic as he or she attempts to align and attribute others' meaning of behavior and actions with personally held beliefs and desires.

> The cognitive process of understanding or even recognizing that there are cultural and cognitive differences is not intuitive at all. … This effort often appears doomed to failure, because, "trying to think like them" all too often results in applying the logic of one's own

culture and experience to try to understand the actions of others, without knowing that one is using the logic of one's own culture.[31]

In his book, Johnston provides a personal narrative of how looking through the self-confirming "lens" at the events surrounding Tiananmen Square certainly influenced his understanding of others' behavior. There were many variables Johnston discussed that could have been indicators to what unfolded in Tiananmen Square, but that he missed because of trying to "fit" his worldview generally, and more specifically, to chart future events. Johnston was also an outsider and, at that time of his life, a college student in Beijing. He was in position to apply a qualitative approach and methods, the "Malinowski Model," as he was a participant in local Chinese society, as well as an observer. Johnston was thrown for a loop on trying to understand the actual events that led up to and unfolded in Tiananmen Square because he lacked historical context.

As a result, he misread the stakeholders and their reaction to the student protest, even the students, due to his cognitive inflexibility to think past or around his core beliefs. Johnston writes:

> My failure to anticipate the way events would actually unfold in Tiananmen Square was tied to ethnocentric thinking and a lack of accurate and contextual information. Students in the United States are encouraged to be politically active, and their protests are often seen merely as minor inconveniences that need to be endured. In China, however, the protesting students were seen as a direct challenge to political authority and, much more so than in the United States, their actions were viewed as an outright conflict between the future elite and the current leadership. The protest itself was viewed as a violation of a taboo, upsetting the cultural order and the stability of society.
>
> As an observer, I missed the cultural context that was necessary to view the events as an actual conflict and could not convince myself that a violent solution was a possibility. I had discounted the hypothesis that violence would occur, because I could not imagine it occurring in the United States. This led me to discount raw data that would have refuted a hypothesis that the two factions would reach a compromise. In addition, at that time, I had no formal

grounding in Chinese studies, nor had I been to China. Thus, I had not acquired information that would have helped me create a meaningful context for the event.[32]

This cognitive inflexibility persists and is often discussed. For instance, *Strategic Landpower: Winning the Clash of Wills*, a 2013 white paper written by Army General Raymond Odierno, Marine General Amos, and then former USSOCOM Commander Admiral William McRaven,[33] echoes Johnston in that "the physical insularity of the U.S. coupled with its egalitarian ethic underpins the simplistic idea that other people are like us, or at least want to be us."[34] Archer sees the initial perspective or view "grounded in expectations stemming from the normal situational behavior learned within one's own culture."[35] Edwards, exploring anthropological fieldwork states, "what is required is an ability to suspend what one assumed about a particular group or situation and open oneself up to the possibility that what is actually going on is entirely different from what one thought was going on."[36] Johnson and Barrett write, "Despite vast information resources and exposure to exotic cultures, Americans continue to overemphasize similarity and assume that other social groups have values and aspirations in line with their own."[37]

The Malinowski Model and Cross-Cultural Competence: A Force Multiplier

Cross-cultural competence is the ability to navigate in complex interpersonal and cross-cultural situations, interpret or express ideas/concepts across worldviews and cultural divides, and to make sense of foreign behavior.[38]

Possessing and using knowledge-based and skill-based interpersonal competencies facilitate successful cross-cultural relationships and promote the ability to discern meaningful behavior. They provide context to interpret past events and gauge the potentiality of future events or behaviors. There has been much research within DOD on identifying core sets of cross-cultural competencies (3C) critical for success in DOD missions.[39] This study offers five competencies for the Malinowski Model that directly relate to the development of cross-cultural communication.

To undergird successful "thinking differently" strategies (for collection and analysis) implies a sense or state of awareness of and process for comprehending the complex nature of the contemporary multi-actor environment that is or is considered relevant to goals and needs. This awareness and process can be referred to as "sense making"—the effort to comprehend behavior and events that transpire due to an intersection of behavior and agency. Paik and Pirolli define sense making as "active seeking and processing of information to achieve understanding. … Sense making can include engaging processes that seek and filter information while also producing schemas that best fit the available data."[40]

Sense making works best when features of the problem set include discrete, informal and unbounded issues. Coupled with sense making is the quality of mindfulness—a deliberate and continual state of awareness that challenges expectations while reflecting on a host of potential alternatives. Regarding the current and future global security landscape, sense making and its underlying sense of vigilant mindfulness prompts a broader mental readiness to consider actions, events and symbols (signs) of threat rather than reducing social complexity to a few variables to rationally predict threat behavior.[41]

To account for a variation of perspectives of and approaches to sense making, there needs to be some understanding of the different stakeholders that have advanced models to further the approach and methods that align with sense making. Here the authors have outlined a behavioral approach to compensating for cognitive and cultural bias. The SOF mission demands confronting bias and opening the aperture of perspective to allow a wider acceptance of social and cultural knowledge in understanding and advancing future behavioral possibilities. A behavioral approach allows the development of cross-cultural capability to help engage the culture groups that are certain to be found in mission activities. The point to be made here is that the label 'sense making' contains complementary approaches and that there are behavioral and human interface components involved.

The SOF mission demands confronting bias and opening the aperture of perspective to allow a wider acceptance of social and cultural knowledge in understanding and advancing future behavioral possibilities.

The SOF mission often requires more than just data and information collection; rather, it often demands behavioral and social skill-based competencies to elicit and analyze local social and cultural knowledge and then to act in appropriate ways to influence the population. Developing the behavioral end of sense making best serves the force, and cross-cultural competence builds that capability.

3C

3C provides access to sociocultural knowledge that will help in traditional and alternative analysis and with sense making. 3C also allows access to others' perspectives to ascertain their intentions and meanings of behavior. In the process, it mitigates cognitive and cultural biases due to a greater appreciation of the population's reality. In short, cross-culturally competent personnel have a narrower knowledge gap in which to insert their own cultural TOM. Additional competencies can facilitate successful interactions across cultural boundaries useful for intelligence professionals who deploy or take assignments in foreign countries to engage in collection or work in partnership capacity.

3C is composed of the following skill-based competencies.[42]

Cultural self-awareness. The cognitive awareness of one's own worldview and belief and value system, the biases that follow, their influence on others, and how to self-regulate when appropriate;

Cultural learning. The skill of learning about one or more cultures through observation, reflection, and research, to include the learning of "culture-general" concepts[43] utilizing learning and data acquisition techniques to gain cultural and regional knowledge;

Perspective-taking. The ability to perceive events the way others do and understand how other peoples' cultural values and assumptions affect their behavior, paired with the ability to suspend judgment and withhold personal or moral judgment until sufficient evidence and/or data becomes available.[44] This requires insight into others' thoughts, motivations, and concerns and enables understanding of cultural behaviors. Engaging in perspective-taking promotes the forecasting of others behavior or reactions within their cultural context.

Participation/Observation. The use of participation and observation skills necessary to elicit the kinds of sociocultural data from culture members to help reveal patterns of behavior and their TOM.[45] Participant-observation (PO) is the foundational qualitative research method for cultural studies. More than just a means to directly elicit data, successful PO offers a means for creating and sustaining cross-cultural relations while also providing an approach to gather and validate the TOM of those individuals and groups integral to mission success. PO can promote sense making and mindfulness, especially when the individual encounters foreign or novel cultural behavior that surprises or confounds the existing understanding of cultural reality.

> *More than just a means to directly elicit data, successful PO offers a means for creating and sustaining cross-cultural relations while also providing an approach to gather and validate the TOM of those individuals and groups integral to mission success.*

Cross-Cultural Communication Competence (4C)

Adding one more layer to this set of skills—communication—presents a deeper set of foundational skills that promote 4C. As a foundational set of skills, 4C reduces misunderstandings in social interactions while increasing the likelihood of eliciting critical information in culturally diverse environments. These skills are rooted in actions and behaviors that are intentionally repeatable and goal-directed during interaction and use appropriate and effective communication processes to successfully navigate an intercultural encounter. There are five "culture-general" 4C skills that are transferable across cultural and linguistic divides:

1. Leveraging communication style

2. Employing effective interaction skills

3. Active and appreciative listening

4. Managing paralanguage use and perception

5. Decoding nonverbal messages[46]

These skills are critical to learn and manage especially when the mission is dependent on the ability to communicate intent and understand meaning.

In the qualitative approach, especially in engaging methods that depend on extracting socially-based knowledge, the quality of communication is connected to the quality of the relationships. 4C is the ability to effectively grasp non-verbal and extra-linguistic means of communication and to compare across cultures.[47] Inherent in this competence is the act of conveying and understanding meaning with people from two or more

Cross-cultural communication involves a comparison of interactions among people from the same culture to those from another culture.

cultures different from one's own. Cross-cultural communication involves a comparison of interactions among people from the same culture to those from another culture. This approach to 4C allows for skill and knowledge development to better communicate with more than one culture group.

Rich Points

One final note before leaving this section on developing a field method for SOF. Michael Agar suggests a good means for accessing foreign culture groups' TOM. As explored earlier, cultures only become "visible" in relation to another culture. In a way, this makes complete sense. People daily move through different (sub)cultural affiliations seamlessly within their own societies. There is little that strikes a difference between the groups and the patterns of behavior they exhibit. For Agar, "global and national histories blow through communities like a hurricane. … in a line attributed to Roy D'Andrade, studying culture today is like studying snow in the middle of an avalanche."[48]

Agar suggests that to make the complexity of a group's TOM more discernable, one should look for cultural markers, called rich points.[49] Agar posits the use of rich points as "moments" when the familiarity of similar systems confronts those cultural outsiders who are defined by a different set of cultural markers and who are unfamiliar with the new contexts and situations. These moments are means to start to understand differences. For instance, Sands says: "I go from surfer to runner to AARP member and adapt to the behaviors necessary to be a member. Intimacy breeds familiarity."[50] Transitions and, as Agar suggests, translations between cultural groups do not produce dissimilarity. Yet, the kind of operations SOF engage

in produce juxtapositions and fissures between groups where dissimilarity can be extreme and meaning difficult to discern.

In many places SOF deploy, there are myriad (sub)culture groups "that feature an array of affiliations based on traditional markers such as ethnicity, tribe, clan, religion, language, bounded geography, but also features such as extremist groups that form around extremist ideology, political issues/topics, and others that are energized through internet/social media."[51] These affiliations, and inclusive patterns of behavior, are then defined by rich points in terms of in-group markers or symbols. Markers help define group members and are often undetectable to outsiders, but when discerned become a valuable "relational" tool.

Here is a quick example from one of the authors:

> I love to surf and enjoy reading about and teaching evolutionary biology. In earlier works, I approached surfing as an expression of spirituality and as behavior that invoked a neurobiological response that is or universal to religiosity and ritual. I admit to once having a Darwin "fish" on the back of my beat-up Mazda pickup surf truck along with the required number of surf stickers; I had my cultural markers and they captured more generally two cultural groups I took membership in: surfers and anthropologists. One day, playing around with designs, I drew a *Darwin Fish* on a surf board and labeled underneath, *Praise the Barrel and Worship the Wave*. I made it into a sticker and pasted it in a conspicuous place on my rolling Mazda billboard. I had taken markers that identified me as a surfer and an anthropologist/biologist/or one who accepts evolution and created a unique marker that drilled down more discretely into a cultural group that had an even smaller membership. Naturally the sticker promoted conversation as it created dissonance. There is a large Christian surfing population in southern California and Christian surfers would see the sticker, see the wave, the "fish" and read the words and would give me signs of support; other surfers not religious would see the sticker, the "fish" with legs and take away the intent to be surfing was my religion. There were only a handful that connected the meanings of the marker as intended.

Rich points indicate differences worth pursuing. The more familiar with the cultural group, the fewer the rich points emerge. However, the less

familiar with cultural groups, the more numerous and profound the rich points are; metaphorically, for the less familiar and uninitiated, the rich points come in waves. In a sense, rich points become indicators of difference and the observer's lack of understanding of meaning about members of a cultural group.

Another example of the messiness of culture is the situational assignment of identity markers and the levels of identity that only come to play in one context versus another. For instance, one of the most obvious identity markers encountered in Afghanistan was a poppy farmer in the southern rural part of the country. Yet, the farmer and his behaviors could have also been aligned with other markers, such as, and in no priority, a Muslim; former Mujahideen of the nine-year war with Russia (which put him at one point, as a U.S. ally), of Pashtun ethnicity, more specifically, a rural Pashtun in southwest Afghanistan; a Durrani Tribesman; a farmer; a member of the Kahn family (and its messages of social respect/land/money); and a Dari and Pashto speaker. These are all represented by symbolic or behavioral markers, each salient to the person. Understanding the correlation between marker, identity, and behavior is based on context of the interaction or can be inferred from observation and will help determine interpretation and/or inferences of behavior, and ultimately help reveal TOM.

There is no single list of indicators that will work for every possible set of circumstances. A social uprising may be preceded by changes in people's attire in one place, by graffiti in another, and by changes in the place women feel safe to go in another. However, there are some commonalities. In social science, observers learn some of these and, more importantly, learn to notice new ones when in the field. Many with overseas travel and work experience already do this intuitively. The challenge is to make this ability more systematic by investing the knowledge it produces into operational and strategic planning and execution.

The key to success is to define a plurality of cultural groups and their alliances, to discern TOM and meaning of behavior for each individual or group, and their connections with other groups. This plurality significantly captures the human domain in high-risk security areas featuring instability, insurgency, or environments and cultural groups caught up in extremist/terrorist activity. The Malinowski Model can be used to identify changes in baseline TOM assessments by providing a continuous monitoring of local behaviors while also testing initial interpretations through repeated attempts

to reproduce group intent and meaning of behaviors. This approach also highlights changing behaviors and prompts the rich point discovery process to probe the reasons for the changes and analyze what the implications might mean for future actions and operations.

The Malinowski Model can be used to identify changes in baseline TOM assessments by providing a continuous monitoring of local behaviors while also testing initial interpretations through repeated attempts to reproduce group intent and meaning of behaviors.

Moving forward, the Malinowski Model will become increasingly essential for SOF ability to perform successfully in the cultural complexity encountered in their missions. This performance includes the development of cross-cultural competence to promote and sustain relationships and partnerships with a host of actors while fostering and applying qualitative methods to discern and better analyze sociocultural data useful for identifying patterns of behavior and their meaning. The Malinowski Model answers the need for deeper understanding of foreign populations' behavior to aid in the discovery of indicators for warnings of impending behaviors as the mission unfolds. Much of this more advanced need involves gathering and analyzing sociocultural "intelligence" not from secondary or tertiary sources, but from one's own means to develop, invest in, and sustain data sources among the culture groups.

Chapter 3. The Value of a Qualitative Approach for SOF

> Almost overnight, it seems, MI [military intelligence] analysts have gone from templating Soviet motorized rifle divisions to assessing the capabilities of clans, tribes, gangs, and militias. The practice of intelligence has evolved from a military science in conventional operations to a military art in COIN. With that change came the challenge of learning about different peoples and their environments.[52]

The Spirit of Malinowski in Helmand

The most compelling example of a qualitative approach suggested in this monograph can be discerned from operations involving U.S. Marines and British soldiers in Nawa District, Helmand Province, Afghanistan—a sparsely populated agricultural region. Cowed into submission by the Taliban, the farmers were distant from the troops, which prevented interactions and useable intelligence on the Taliban. In July 2008, sweeping in from the air, 800 Marines landed and spread out across the district, setting up about two dozen smaller remote bases planted in corn fields, near small villages. Over five months of engaging in COIN tactics, the turnabout in relations between the Taliban and farmers—and that of U.S.-led forces and the same farmers—were night and day. During those initial days, the small Marine posts existed as many of the same villages they neighbored: little power, just radios, and little need to classify material. Intelligence resources were pushed down to the company level and the paramount mission of the bases was establishing familiarity with the villagers living nearby. In effect, over those five months in Nawa District, many Marines were collectors, not just riflemen, and observers of patterns of behavior of villagers and key leaders alike. They were collators and preliminary analysts who also produced daily written findings, or without too much of a stretch, field notes that chronicled stories in the true spirit of Malinowski.

Eschewing sophisticated data networks, as that capability was ill-supported, the battalion intelligence officer hosted nightly radio "chats" with the scattered analysts who read from their notes containing local activity,

and, perhaps more critically, learning what other analysts were privy to over the preceding 24 hours. From the field "daily reports incorporated a wide variety of sources: unclassified patrol debriefs; the notes of officers who had met with local leaders; the observations of civil affairs officers; and classified HUMINT [human intelligence] reports."[53] The officer amassed all the information into one detailed report and from that somewhat lofty perch provided back to each analyst questions that lingered through days and follow-on questions in response to recent activities.

Consider this: what each analyst provided was his own narrative that tracked social interactions, attributed and interpreted the meanings that flowed, and carefully crafted interactions between villagers, farmers, and the U.S. military. Consider also that the intelligence officer was compiling a meta-narrative of a district's worth of social interactions and their meanings. While each analyst was in effect charting patterns of behavior in his area of influence, the officer was doing the same over the whole district to derive a district-level TOM.

At the start of this five-month endeavor, and as familiarity grew on those points of logistical interest that were close to the Marines' hearts and mission, the terrain was identified and charted; the "location and conditions of roads, bridges, mosques, markets, wells, and other key terrain,"[54] a sort of network of how villages were related and connected. Once charted, this physical infrastructure became set and offered a backdrop for the more important assignment of unlocking the perceptions of the farmers, as Marines pushed to capture their allegiance. Often, the Marines posed questions to the farmers that probed the farmers' feelings about the insurgents, their feelings of security, an ongoing query about disputes and their resolution in villages, their families, their kinship, even their tribe. The Marines were looking specifically for wedges, "anchor points" to insert between the Taliban and farmers and drive them apart, and wean them from Taliban control. What the Marines were getting were patterns of behavior in their responses while being provided updated narratives from each respondent. The Marines were then able to overlay those answers with others from the past (captured in their written reports) and, consciously or not, start to see patterns of behavior over time.

The motherlode did not stop there. The Marines could do this with multiple individuals (triangulation), and over time and space, create a shared cultural reality for their area, which in effect was not so much geographically-defined as it was interactionally defined by social relationships. Earlier,

identity markers were explored as part of a re-imagining of culture, and in these interactions the identity roles assumed by farmers would have become explicit and important to discovering the differences in patterns and the contextually-based meaning that went along with those patterns. Because the Marines not only observed, but also invited themselves into and became a part of the daily lives of the villagers, they became active participants.

In their daily interactions and observations, it became apparent that the Taliban power structure was undermining the village elder approach to traditional governance. To open the potential for an alternative approach to governance that incorporated the traditional and collective power of the village leaders, the Marines looked to strengthen ties with the leadership and promote the benefits of stronger ties with the Afghan government representatives.

The battalion commander partnered with the district governor, traveling with him constantly and participating in impromptu meetings with citizens to build their confidence in Afghan and U.S. security. To demonstrate the benefits of working with the Afghan government, the battalion facilitated development projects that addressed grievances identified through coordinated surveys of the populace by Marines and civilian officials. These efforts paid off. The district governor persuaded elders to reconstitute a traditional council featuring locally selected representatives from each sub-district. The council served as the primary advisory board to the Afghan government in Nawa District.[55]

Retired U.S. Army Lieutenant General Michael Flynn et al use Nawa and other examples as illustrations of the power of a more responsive intelligence network, underscoring the emphasis of an intelligence process that is both structured but malleable to conditions and needs on the ground. However, just as critical to the success in Nawa and other places was the ability of the Marines on the ground to be effective social and cultural "fieldworkers" engaging in an informal cultural research protocol that was systematic and formal in many ways; the emphasis on written notes, the participant-observation, the questions that probed and allowed both Marine and villager

To demonstrate the benefits of working with the Afghan government, the battalion facilitated development projects that addressed grievances identified through coordinated surveys of the populace by Marines and civilian officials.

to construct shared social and cultural knowledge and then explore the meaning of that knowledge in interactions and observations. The Marines composed narratives that allowed their interpretations to be funneled up the chain to the deputy commander where it was integrated into a master narrative for the district's TOM.

More interestingly, during their five months of research, the Marines were also building a compendium of core beliefs that could provide a deeper understanding of group motivation and the culturally-attuned reasons for those motivations. Ironic as it may be, this understanding of core beliefs becomes the basis for posing questions about past, current, and future behaviors and interests. Just as important, being able to access and understand core beliefs allows the right kinds of questions to be asked for framing future military actions. In the traditional intelligence process, this kind of investigative discovery, with its emphasis on long-term, intensive, qualitative-based, and self-conscious testing of validity, is rarely engaged in or utilized. What drove the Marine's success was the power of the fieldwork and informal research design they implemented. Nawa is a perfect example of how to fold ethnographic theory, design, and application across a host of SOF core activities.

An Overview of the Qualitative Approach

Culture from the Ground Up—Shared patterns of behavior

> Perception is strong and sight is weak. In strategy, it is important to see distant things as if they were close and to take a distanced view of close things.[56]

The idea of culture as a closed, repeating, and stable system muddies the waters and limits the hunt for valid interpretation. As Agar suggests, culture never is, or was, a static object, but a dynamic set of experiences formed around rich point markers. However, the concept of culture has great utility if approached from the perspective that humans share distinct categories of behavior, such as modes of alliances and social networks, featuring varying degrees of the importance attached to kinship, the sense of heritage, norms of power sharing, values on and systems of exchange and how wealth is conceptualized, the role of religion, and more.

Americans like to think of culture in terms of familiar categories: religion, politics, economics, social structure, values, customs, music, and other

forms of entertainment. These can be discerned in American society, and, to be fair, social scientists and anthropologists are complicit in telling everyone that list of categories matters. Such categories can be useful to a point, especially when introducing a systematic and somewhat abstract approach for understanding the complexity of human behavior and providing a useful lattice to begin investigating the diversity of behavior. However, most people have not organized their lives per these categories. Politics and kinship are simply not consistently separate things. It is important not to get so trapped in typical categories and biases that how things are truly connected are overlooked.

Cross-cutting Processes

All cultures have approaches, or processes, to events and activities that cross-cut domains. For instance, peoples' social networks are as important as social structures, and include components such as family, kin, lineage, clan, tribe, and other associations. However, there are universal forms of capital that act to connect and anchor networks, such as economic capital (referring to money or goods with financial value), human capital (referring to resources accruing to an individual through education, effort, innovation or creativity, including personality, knowledge, and skills), social capital (referring to the value of the resources people can potentially access by virtue of their social network ties), and symbolic capital (referring to the resources accruing to an individual through honor, prestige, and recognition).[57] Groups of people mobilize deeply held aspects of core beliefs and values for their own purposes and construct ideas about individual and group identity that influence what alliances they make and how they react to outside influence.[58] Every group relies on narratives and themes that say something important about how the group sees the world and itself to reinforce who those comprising it are. These show up in art, literature, media, speeches, myths, etc., and can be hard for the military to see. Unfortunately, they are often the most important aspects of culture for security purposes.

Core Beliefs

At the heart of identity, what motivate and sustain group formation, are sets of cultural core beliefs (and values that result from these beliefs). They are intrinsic to individual motivation as well as group behavior. Beliefs are ideas

about the world that are held to be true by the believer. A belief is a "simple proposition, conscious or unconscious, inferred from what a person says or does."[59] Stemming from a lifetime of experience, core beliefs are underlying and foundational assumptions based on empirically-driven experiences of one's reality. They are held firmly and are resistant to change. Core beliefs are manifested in reinforced patterns of thought and behavior "defined by our various assumptions and expectations, as well as our ideas about the way the world works, collected over time."[60] These truths become set in belief systems and act to connect people together. To the authors, social and cultural core beliefs are ideas that individuals or groups hold to be true and natural and can include, but are not limited to, knowledge concerning: identification of members of a cultural group across space; the dynamic nature of identity formation given the interactional, strategic and operational context; the meaning and location of sacred and cultural spaces; causality and the relationship to ideology and the influence of agency on members' future behaviors; authority and the concept of right and wrong; the meaning of exchange; the meaning and value of success; and the nature of health and consequences of ill health, among others. Operating at the fault lines of perception, SOF often must navigate through or around local core beliefs that constitute the groups' social and cultural reality. If a belief system says X is true, then SOF working in that environment must address X and manage the discordant cognitive and cultural biases resulting from their own perspectives of reality.

Research on cultural modeling suggests that cultural behavioral schemas are underpinned by core beliefs and act as motivational forces for individual and group behavior, as cultural schemas are the result of a lifetime of socialization and experience and are prone to stability and endurance despite environmental changes. Core beliefs act to motivate behavior through schema model activation, so grasping the meaning of these core beliefs can provide a roadmap for designing appropriate influence activities for larger populations or even local subgroups. Consistent with the complex international and transnational security landscape, core beliefs often become a response to external stress and uncertainty, often found in radical change inherent in terrorism, insurgency/COIN, and instability. Core beliefs become "pressed into service, reformulated to resolve cultural, social, and biological crises … [or] mending or reconciling ruptures between past and present, and between old and new worlds."[61]

A recent body of multidisciplinary research on sacred values details how a type of value can promote terrorism or terrorist acts and, alternatively, be used to understand terrorism.[62] The notion of sacred values can be looked at in two ways: (a) as a construct, a preference that resists material scale, and (b) a process where the sense of "sacred" is applied to this preference that may or may not be grounded in a religious context. This "sacredization" is set in motion via any number of reasons. It has been suggested people generate sacred values by embedding the value, or belief preference into religious ritual. Conflict between cultural groups enhances the importance of these values, "the intensity of participation in religious ritual and perceived threat to the group lead people to transform otherwise mundane and secular phenomenon into protected or sacred values."[63]

This study suggests that sacred values represent just a subset of a larger set of beliefs, (cultural core beliefs, or core beliefs for this study) and values that with greater clarity can be useful in forming an understanding of sets of assumptions and behaviors about cultural groups that are active in the interactions and observed behaviors of culture actors. Core beliefs are ideas that form how people see themselves, their neighbors, the groups they belong to, groups that make up their world, as delineated by cultural markers, and the future and can include such ideas as causality, group members' relationship to the cosmos, the nature of beauty, sense of family, the value of life, the nature of exchange, identity formation, sources of truth, and many others.

Sacred values offer valuable insight into how values are enshrined in religiosity and transcend everyday behavior, the process of negotiation, and the influence of sacred values on what is negotiated, and perhaps even understanding how terrorists become terrorists. The lessons of COIN, however, indicate that there is greater need to understand the genesis and meaning of a larger array of cultural behavior of the many cultural sub-groups from their own perspectives. For instance, "Current AFRICOM missions are largely based on cooperative relationships and many of their programs emphasize the training of local participants."[64] Specific to conditions of high risk, knowing core beliefs and values of the cultural groups can provide insight into what motivates behavior and can provide knowledge significant to low density missions critical to influencing the behavior of those cultural groups.

Getting at these core beliefs and their meanings can be facilitated through observation of different cultural expressions, such as ritual, myth, narrative, art, or more fundamental social processes such as the nature of kinship

relationships, the cultural meaning carried in exchange, the relationship between heritage and the physical landscape, and many other forms. Eliciting these expressions and their meanings can be accomplished through a variety of methods. The approach advocated in this monograph borrows from Agar's concept of languaculture—the notion that culture and language are inseparable and language consists of a host of knowledge sets about the speaker and his or her culture. This includes a person's biography; the nature of the situation he or she is in; perspectives on history, politics, ideology, traditions, rituals; and much more in addition to the more mundane language components, such as grammar and vocabulary.[65] Fieldwork involving focused participant-observation and language familiarity can elucidate these expressions and meanings. Eliciting and understanding languacultural elements depend on ethnographic skills and methods utilized in social science fieldwork,[66] such as those employed by many Human Terrain Teams. SOF can develop these skills in culture and language programs. Engaging cross-cultural competence (mitigating powerful cultural biases and making sense of complex and surprising or even disturbing behavior) or thinking differently, is critical to ascertaining fidelity of cultural reality of those cultural groups.[67]

Application of core belief understanding and motivation of behavior can help meet mission requirements in a variety of cultural environments. It is clear that core beliefs affect and motivate behavior, which impacts strategic, operational and tactical planning including specific mission types, training, MISO, influence and public diplomacy, and conflict resolution. Influence efforts may range from overt to clandestine, and as experience in COIN seems to indicate, those in cultural groups will shift their behavioral patterns in response to that influence. Several approaches to "Phase 0"/"Left of Bang"[68] activities are too narrowly prescribed to be of much use during adversity; people mobilize around narratives or ideas that are different than those predicted. Low density missions established for influence or data collection depend on intimate and extended interactions within the human domain and would benefit greatly from leveraging core belief understanding. That understanding is only valid and accurate to context, location and factoring in the influence of other actors in the human domain. The search for core beliefs is useful when analyzed in the context of local groups and considering those transnational actors as savvy and creative beings who will change their strategies if they feel efforts are impeding them or subverting/

corrupting their message or traditions. This "left of influence" approach will impact the effectiveness of military operations in a myriad of foreign environments, including critical pre-engagement periods.

Core beliefs, and identities that coalesce around them, are often co-opted by groups to mobilize segments of a population to create change, for instance through civil disobedience or even violent insurgent and terrorist tactics. Mobilization is "the process of how people's attention, conversation, and behavior start to crystallize around some element or marker of identity."[69] Mobilization intensity and behavior often depend on how viscerally core beliefs compel individuals and groups to action. Conflict can oftentimes involve group members drawing ethnic or racial distinctions that create difference in the adversary where during periods of peace these distinctions made little difference in interactions between the groups. On the precipice of conflict, mobilization can be an indicator of danger, "if people start to talk about their

Conflict can oftentimes involve group members drawing ethnic or racial distinctions that create difference in the adversary where during periods of peace these distinctions made little difference in interactions between the groups.

problems in terms of ethnic differences and to emphasize their own ethnic identity, it may lead to their simplifying a complex problem and blaming it on another group. It becomes easier and easier to simplify, to blame, and then to think about doing harm."[70]

Rwanda: A Brief Case Study in Mobilization[71]

This process of mobilization can be seen in the racial and ethnic history of colonialization and afterwards in Rwanda.[72] Prior to colonization, relations between ethnic groups in the area were peaceful and featured identities that were socially accepted and had been for centuries. Periods of first German, then Belgian colonialism drew sharp distinctions between the two major ethnic groups, the majority Hutus and the minority Tutsis in terms of ethnic and racial characteristics. The Tutsis were favored by the colonizers, and while colonial powers maintained control and those distinctions were favored, the elevated status of the Tutsis were more or less institutionalized in Rwandan society. With independence, Hutus became the governing power. Toward the end of Belgian rule, and chaffing at the more severe inequality,

Hutus began to mobilize around the very same racial distinctions the Belgian colonizers attributed to the Tutsis. It is important to understand salient identities and how people can mobilize, or take collective action, around them in specific contexts for particular purposes. For example, the Hutu elite used identity factors that included racial attributes to separate 'us' from 'them.' People can use identities to dehumanize others in conflict, while justifying abhorrent actions.

A 30-year period of episodic off and on conflict ensued against Tutsis who had fled the country and formed a resistance army. Tensions can simmer for centuries without surfacing or spinning into conflict and actual violence. Even through the colonial period, tension may have smoldered below the surface and reinforced by the status and privilege accorded to the Tutsis, violence and ultimately conflict was managed by the existing power structure. However, independence brought a radical change to that structure and shortly thereafter, 300,000 Tutsis fled in the face of Hutu nationalism. These exiles formed an opposition—the Rwanda Patriotic Front (RPF)—which periodically would strike back into Rwanda. Over the next three decades, Rwanda experienced unrest and the violent retaliation against Tutsis living in Rwanda by the Hutus would follow after each incursion by RPF rebels.

A power sharing agreement was reached in 1993 between Hutus and Tutsis following a civil war and ceasefire. Tensions remained high with scattered violence despite public acceptance of the agreement. Mobilization can be a first step toward violence if a leader and/or leadership, in the case of the Hutus, accentuated patriotism as a means to overcome discrimination against them. This eventual path to conflict was solidified as people were led to believe that options for redressing human security deficiencies or inequalities were exhausted. However, before the agreement could take effect, the Hutu government was plotting to maintain its hold on the government. A variety of methods engaged by official and unofficial sources served to mobilize Hutu emotions and whip up hatred and hysteria against the Tutsis. The 1994 plane crash that claimed the sitting president, a Hutu, was the final catalyst that precipitated five months of genocide against the Tutsis. Eventually, the Tutsi-led resistance army defeated the Hutus and reconciliation was reached. Determining the role of race and/or ethnicity in conflict is just a first step to understanding why it is occurring. A more faithful representation of reasons leading to conflict requires determining

what has prompted mobilization in the face of past periods of history where groups did manage relations.

Cultural Interfaces

Accessing and identifying core beliefs involves mediating cultural interfaces that exist in transactional spaces between two or more cultural groups; some defined by state, tribal area, language group, and some defined by relations fostered by the internet and social media that cross-cut these more traditional cultural boundaries. Cultural boundaries in the human domain are partial and fuzzy. Rich points emerge in the cultural interface where meaning of behavior is missed or not understood and become portals into defining and comprehending unique "cultural" behaviors. This interface is not a clash of opposites, but a layered and entangled interactive space where culture groups

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that come together and is different than either of the individual culture groups. So, in effect, the experience is novel to each. To operationalize the Malinowski Model ethic,

> What is needed is a reconsideration of a different conceptualization of the cross-cultural space, not as a clash of opposites and differences but as a layered and very complex entanglement of concepts, theories and sets of meanings of a knowledge system … (and) should be primarily about bringing them into conversation … in order to negotiate a new set of meanings and reinterpretation of meanings.[73]

Being able to decipher that cross-cultural space demands the use of rich points that can accelerate accuracy of understanding and the ability to better comprehend past, contemporary and future behaviors. Core beliefs can be subsumed within a variety of cultural expressions such as folklore, narrative, relationships, ritual, and others. These are often beyond the knowledge or access of those military and civilian personnel on the ground.

Culture benefits only if one can accurately reflect the interactive environment. Core beliefs were introduced as meaningful and powerful representations as foundational ideas held to be true that can compel individuals and

groups to act. However, care and consideration must also be given when conceptualizing labeling/bounding human interactions and activities within a discrete "unit." This labeling brings its own set of analytic and perceptual biases. In the remaining chapters, this study will explore the nature of qualitative methods to access such foundational elements as core beliefs.

The Qualitative Approach: Revealing Core Beliefs

> We need a powerful mode of argumentation, a mode that ensures we can represent our representations in credible ways. In such worlds, a systematic argument enjoys a star-spangled legitimacy. We need a way to argue what we know based on the process by which we came to know it. That's what I seek, not as the only possible representation our field can offer, but as an essential lever to try and move the world.[74]

Integral to a qualitative approach, and the Malinowski Model advanced in this monograph, is that the process of discovery also includes, besides investigation and analysis, interpretation of the observation to identify patterns of behavior (relationships) and to make sense of the meaning of that behavior. Human behavior spins on the underlying belief and value systems of individuals and culture groups. Core beliefs have been identified to frame cultural expressions such as kinship/family, exchange, governance, and more. Yet, retrieving those foundational beliefs or "truths" depends on an effort and design that considers collecting, interpreting and analyzing a variety of data and experiences to secure insights in and advance understanding of a larger reality or components of that reality in a "natural setting." More generally, this approach, referred to as a qualitative approach seeks to understand phenomena in context-specific settings, such as "real world setting [where] the researcher does not attempt to manipulate the phenomenon of interest … [and the] phenomenon of interest unfolds naturally."[75]

On the other hand, the quantitative approach engages through systematic empirical methods an investigation of observable and repeatable events, actions, relationships, and behaviors. The analysis of these phenomena attempts to arrive at causal determination, prediction, and generalizability. Quantitatively-derived data, such as surveys and other means to gather sociocultural "Big Data" involved in sociocultural analysis can provide context for the more intimate and local qualitative approach. The Malinowski Model

advocates the need to ferret out core beliefs and offers a broader appreciation for cultural reality of those in natural social and cultural settings. Obviously,

in this natural setting, there is difficulty in producing findings based on "statistical procedures or other means of quantifica-tion."[76] Considering that social and cultural knowledge is in part constructed in the relationships that form in SOF' everyday operations, the quantitative approach does not take into account "the many interaction effects that take place in social settings."[77] Perhaps the most important element of a

Quantitatively-derived data, such as surveys and other means to gather sociocul-tural "Big Data" involved in sociocultural analysis can provide context for the more intimate and local qualitative approach.

qualitative approach is that inquiry and discovery should lead to "illumina-tion, understanding, and extrapolation to similar situations."[78] Reliance on Big Data only to describe patterns and trends at a macro-level does not do justice to the local variations on any larger theme, and may in fact, distort or hide patterns and behaviors of the local population (see figure 3).
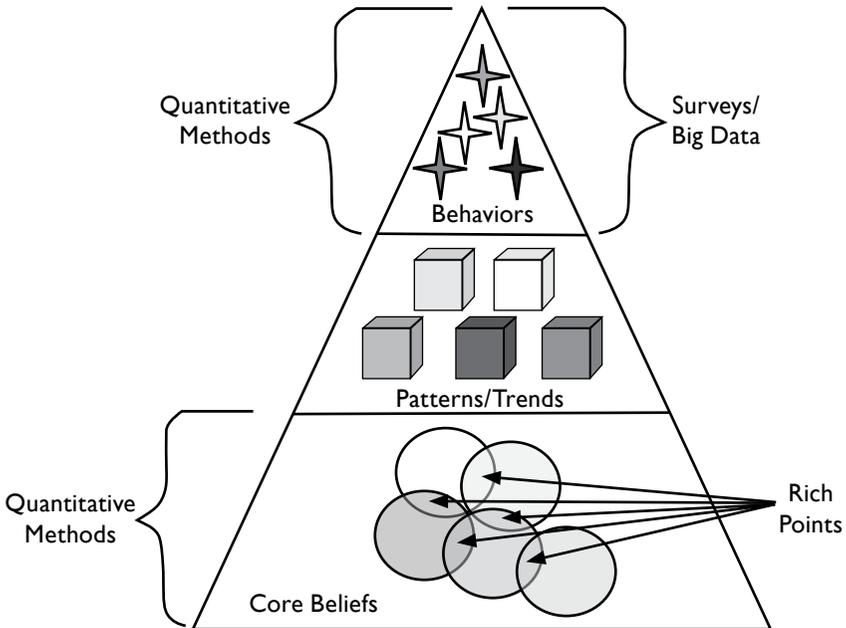
Figure 3. Conceptual depiction of the general utility quantitative and qualitative approaches.

As discussed regarding messages of identity, the meaning of those knowledge expressions are based on a social and culturally-situated context. In other words, knowing and being able to represent a social and cultural reality of others is, as Malinowski surmised, critical to understanding group actions and activities. For SOF, entrance to this reality could be through questions asked or considered during their time spent with culture groups, such as how people make sense of their everyday lives and identify specific strategies people use in making sense of their world.[79] Even more generally, the meaning that comes from knowledge construction is derived from questions that start with "why," "how," and "what." These questions entail canvassing complex knowledge from the people with whom SOF associate to reveal certain attributes or life experiences—knowledge about their experience and the contexts influencing their relations to others, behavioral choices, and attitudes. These are the kinds of questions that can be answered by qualitative approaches to research.

Characteristics of Qualitative Research

In general terms, qualitative research is person-oriented rather than variable-oriented. It involves investigation that is firmly set in the observation of and meaning derived from social interactions and relationships of an individual or group, and not inquiry that considers the expression of variables as the level of social intimacy he investigator and investigation gets to the individual or group. Finally, qualitative research implies a focus on depth, rather than breadth, of the population. The general goal of any qualitative research is understanding of social and/or cultural phenomenon, and the orientation of research is motivated by methods geared toward discovery. General goals[80] revolve around:

- **Exploration.** What kinds of behaviors or phenomenon are present and how are they related?
- **Description.** What do behaviors look like when observed or described? What do the meanings of behaviors describe in terms provided by those who exhibit behaviors or are familiar with them? What are descriptions of materials, actions, activities, and associated meanings?
- **Comparison.** How do behaviors, meanings, and identities compare with individuals, groups, or context?

- **Model Testing.** For SOF, model testing can refer to: How do patterns of behavior and activities conform to existing social and cultural understanding or experience?

More to the point, qualitative research uses subjective data to extract meanings, concepts, definitions, characteristics, metaphors, symbols, and descriptions of things that are held by or reflective of a society, tribe, culture group, village, an extended family, or an individual and other associations. The discovery process occurs within the context of relationships, location, or activity or action, at a specific point in time or extended over time. Finally, discovery is not usually limited or narrowly defined to groups or phenomenon; the more holistic in scope and in knowledge objectives, the more opportunity to discover additional connections or relationships that carry meaning and motivation.

"Just So Stories"

> You may have heard the world is made up of atoms and molecules, but it's really made up of stories. When you sit with an individual that's been here, you can give quantitative data a qualitative overlay.[81]

In a dusty Afghan village with sun blazing, an exchange between an American military sergeant and an Afghan elder illuminates the power of narrative to help understand actions "in the moment" while also interweaving the message of how Afghans "see" their landscape.[82] It is a far different perspective and reality than the American soldier is aware of. The elder is asked to help locate nearby Taliban. Says the elder:

> The Taliban are over there—not far away. I would like to tell [the Americans] a story. In our country, we grow wheat and we have ants. There is no way we can stop the little ants from stealing the wheat. There are so many little ants it is almost impossible to stop them. I've told this story to help the Americans understand the situation in Afghanistan.[83]

The interpreter chooses not to translate the parable and instead offers that the Afghan is "telling stories." This feeds the already impatient soldier's estimation of the elder and Afghans in general and the exchange between the two quickly results in a failed objective. If the interpreter had translated word for word the story, one wonders about the outcome. Given the sergeant's

already set perception of Afghans, he would not have been impressed by the story telling and/or would be confounded by the elder's perspective; in this parable, he was confronted with a rich point; a dissimilarity that begs cultural excavation. The sergeant suffers through frames of his own reality that limit his ability to comprehend, let alone use the parable then or later to benefit the mission. The Afghan, through his story, was for a moment seizing the cultural interface that existed in that cross-cultural space between them and exerting power through his knowledge over the "chaos that surrounds him." Writes Vanessa Gazari, author of the exposé on the HTS, *Tender Soldier*:

> Knowing how to read stories separates Afghans from the people known in Dari as haraji, outsiders, namely everyone else. The Afghan is saying something crucial about the inseparability of insurgents from everyone else, and about the dangers of fighting in the weeds, where bullets can strike the wrong targets, like pesticides that kill the very crops they're designed to protect.[84]

The story may not reveal immediate data that is useful to locating insurgents, but offers an in-depth understanding of what the world looks like to a people with a long history caught up in a contested space where insurgents and counterinsurgents dramatically impact their well-being, their sense of tradition, and more importantly their cultural identity. The story's value is based on several factors: the context, the relationship, the telling, and the validity of that story to reveal motivations useful in determining future behavior, all dependent on intimacy of interaction.

People orient themselves in their lives through stories they tell involving family, friends, and those that populate the wider cultural world around them, as well as their experiences. Paul Durrenberger calls these accounts "just so stories,"—stories meaningful and intimate to the people who recount them, but not as meaningful to others, who may not share the experience in the story but can understand the thread of the story.

> Whatever else these stories are, they are cultural artifacts, just as much as a 1965 Chevy, a hand axe, or an episode of Days of Our Lives. If we want to learn about a culture, we study its artifacts, especially the ones that say something about social relations and the culture itself.[85]

Listening to and telling stories is a human trait used for thousands of years to entertain, educate, relay myths, and pass down important cultural information from generation to generation. Translating these stories that are meaningful to a wider audience is of primary concern to extracting "messages" which house "patterns or themes," that are relevant to how the wider world is designed, constructed, and maintained. Yet in daily lives, the everyday drama is associated with village life, or a Shura, a wedding, the account of an argument with a kin member, a feud between two families, the death of relative and the funeral, the raid that captured teenage girls in a rural Nigerian village, and the list goes on and on. These are stories too and they are filled with actors that circle in and out of social interactions that SOF must navigate and often take part in to advance their mission, but more generally to observe to continue to build a repository of information and advance with more probability local theories for how individuals and groups will act given future conditions and actions. In general, just so stories, as James Spradley writes, are "concerned with meaning of actions and events to the people we seek to understand."[86]

In essence, ethnographers are after meaning of behavior, of symbols, artifacts in both kinds of knowledge and expressed through interpretations.[87] Cultural knowledge then forms the basis of interpretation for group members and the ethnographer, or for SOF of meaning inherent in behavior, actions, and words. Often interpretations of behavior and symbols will vary widely between individuals even within a group, not to say between distinct culture groups. Identifying areas where interpretations widely diverge can be mediated by Agar's process of utilizing rich points and Durrenberger's concept of just so stories to hone in on differences and then offer ways to minimize the divergence.

Ethnography, thus, as Durrenberger and Agar, and many other ethnographers have discovered, is the entrance to the cultural knowledge necessary to interpret and leverage just so stories. Social and cultural knowledge is essential to live, work, and be a part of a culture group, including kinship groups, religious affiliations, governing groups, and other "identity markers."[88] This knowledge then becomes the repository of guidelines on how to act, how to think, how to believe, etc., in accordance with a group's expectations. There are basically two kinds of knowledge that are useful in explicating, understanding and interacting within someone or some group's social and cultural reality. Explicit knowledge is readily identified, accessed and communicated

through cultural records, such as, "words, numbers, codes, mathematical and scientific formulae, and musical notations. … and is the knowledge found in books, on the web, and other visual and oral means."[89] More specifically to understanding social and cultural reality, explicit knowledge can also be observable in members of a group or larger society and all members are fully aware of aspects of explicit knowledge such as standards of right and wrong, typical behavior patterns, technology, etc.[90] Social and cultural knowledge considers rules and behaviors that guide the nature of social interactions and identify rules that govern positions people take and act on, such as rules of kinship associations, the social and cultural rules of leadership councils, an honor code, and many more. These are seldom written down by the culture group that SOF interacts with, but members are "explicitly" aware of them through socialization and other social and cultural learning experiences.

On the other hand, implicit cultural knowledge most often lies below one's consciousness and a person is not aware of how his or her behavior is being shaped and influenced by this knowledge, "the assumptions and premises underlying behavior and thought."[91] This kind of knowledge governs how group members reflect notions of personal space, rules of social interaction, cues to look for to gauge trustworthiness, and others. SOF benefit from being somewhat culturally fluent in both sets of this knowledge for obvious reasons—they are critical to understand and engage in gaining deeper access into the social web of interactions, while also discerning critical pieces of interconnected information to further understanding. Minimizing the effect of interpretation, and reducing the "cultural" space which is what most ethnographers are after, the alignment of interpretations of cultural reality, the more knowledge shared, the less likely interpretation will differ.

To understand the gravity of meaning, interpretations must be based on inference—inference of the meaning that is based on both explicit and implicit knowledge. This is the critical stage of any successful ethnography. How good are the inferences one can draw from what people do—their behavior; things people make and use—their cultural artifacts; and what people say—their words taken from a variety of spoken (or read) messages. Geertz frames this distinction as notions of thick and thin description. Thick refers to the meaning behind behavior and its symbolic import in society or between communicators, and is composed of facts but also of commentary, interpretation, and interpretations of those comments and interpretations.[92] Geertz used the wink as an example of thick and thin. The actual wink would

be classified as thin description because it is merely a biological response, while the wink from a thick description perspective is looked at as a sign which bears cultural as well as contextual meanings as an interpersonal communication.

The success of aligning inference to meaning rests on the ability to reason from evidence (perception) and premises (assumption) that is part of the process of interpretation. In effect, at the beginning stages, an inference is like a hypothesis that through fieldwork is tested repeatedly until there is a certainty between ethnographer and culture members that cultural meaning is functionally shared. To move from inference and understanding of cultural reality to being able to utilize that reality across the scope of SOF missions, it is useful to examine the role and perspective of the ethnographer as "insider versus outsider" in respect to the nature of the data collected.

The Perspectives of Emic and Etic and the Nature of Ethnographic Data

Perspective and interpretation is critical in ethnography. The role of an ethnographer as has been discussed earlier is a dichotomy, or one of insider/outsider trying to get inside "the head" to elicit meaning, but staying detached to allow an objectivity to consider meaning from that of the cultural "other" and the interpretations of that meaning beyond the cultural other. "This dichotomy references the ability to get at mind, intent, and emotion of others while still being capable of applying that perspective more generally in broader, comparative and methodological terms."[93]

One of the critical components of cross-cultural competence is perspective-taking, and the linguistically-derived concepts of *emic* and *etic* (from *phonemic* and *phonetic*) are used to describe the inside/outside roles. Phoneme refers to a distinct unit of sound and a phonetic unit represents the signs and symbols that are attached to the sound and give it meaning. Pike borrowed on this distinction and applied the label emic to refer to inside a system while etic refers to outside a system. In Pike's formulation, an "*etic* viewpoint studies behaviors as from outside of a particular system [culture] while *emic* viewpoint results from studying behavior as from inside the system."[94] Both emic and etic views are idealized states; an emic perspective strives to represent a system of core beliefs and TOM, or more generally, a cultural reality from the mind of an individual who is also a

member of several culture groups. The etic perspective is useful to draw comparisons across a culture group or between culture groups based on an external "standard."[95] In other words, certain elements of the etic perspective are consistent with the quantitative approach with which the military is highly comfortable, while the emic perspective is consistent with a qualitative approach represented here by the Malinowski Model. However, consistent with qualitative methods, such as those presented in this monograph, qualitative researchers can utilize both emic and etic approaches without the use of quantitative data.

One important distinction is to take the emic perspective and utilize it for further means, most likely to inform an etic perspective, while the local individual is not motivated to comparatively explore his or her world from an etic perspective.

> The emic perspective becomes "localized" in a larger process with an end goal much different than an insider's need to be solely proficient to live within that culture. The outsider must not only be at a proficient level, but also to translate that proficiency into data useable in an etic formulation. A cultural aptitude will always be a barometer of truthfulness and validity of perspective.[96]

If the SOF member is a cultural native or has spent sufficient time in that culture, that may act to "bias" that insider perspective and undermine the validity of its utility. The ideal of pulling an insider's view also is affected by the cultural other's self-understanding "that are often culturally and historically-bound."[97] In other words, in pulling the insider viewpoint the ethnographer is not privy to the socialization of the group experience that influences the cultural other. On the flip side, the idealized etic perspective "is a neutral rendering of the observer, stripped of ethnocentrism, any Western bias or political or social agendas. It also assumes that levels of interpretation have been reconciled within the observer."[98] The etic standard, however, is very rarely ever achieved without the tools and commitment to self-reflection.

Further complications develop the "deeper" one gets in familiarity with culture groups. Cultural reality is framed by core beliefs and as such, it also reflects a "public representation" of meaning. That is why it is critical for SOF to be part of that public "space" and those who make up that public web of interactions. Interpretation of meaning involves squaring individual representations and meanings that may be divergent with a goal that may

involve building a collective interpretation through a collage of members. In other words, it is important to expose others' reality, as well as make sure it is also authentic and tracks with those who are represented in interactions. Individuals will express perspectives that differ slightly or perhaps more definitively with others who are part of that culture group or identity. By triangulation, the more perspectives mined, the more valid the data-inspired interpretations stand in for validating cultural reality to those being interviewed. What comes back to SOF is a

> *Interpretation of meaning involves squaring individual representations and meanings that may be divergent with a goal that may involve building a collective interpretation through a collage of members.*

multilayered narrative that considers an amalgamation of different views of reality through just so stories, including the author as compiler of all the perspectives gathered.

For SOF to consider only an etic view risks missing deeper and more useful explanations for the reasons why a culture member thinks and acts the way he or she does. The end state does not end at inferences of multiple cultural realities. Marvin Harris considers the role of that insider's perspective useful only if it provides a generalized theory that can speak to needs and illuminate an array and motivator of behaviors.[99] On the other hand, considering only an emic perspective results in verifying indigenous substantiations and what they might mean by beliefs or actions. This leaves SOF short of more useful explanations for why cultural insiders act or think the way they do. Aiming for a more general understanding beyond just description of what motivates behavior is critical. The end goal is to understand what generates and motivates cultural actors, and an emic-only "bias" of description versus more general comparative analysis may hinder that effort.

The Malinowski Model and perspective-taking ethic require both an emic and etic approach. The need to consider "voice"—the "insider" or "native" perspective—is important if the assumption is that perspective-taking is a critical skill-based competency to support a more relevant intelligence process "on the ground." Moving from the specific emic to the general etic, the analysis should not be limited to what culture members say or think—it should seek to explore the issue from a range of analytical lenses. A HTS social scientist explored that limitation when he concluded the goal of eliciting information from strangers in the Afghan countryside was not the

type of culturally-informed, emic/etic infused knowledge that was the result of fully-engaged ethnography that produced rich and "thick" description capable of yielding prediction, but allowed for the enlargement and depth of the universe of how knowledge is created and talked about.[100] For example, poppy in Afghanistan was a symbolic paradox that existed between an emic perspective of its utility to local villagers and critical to their economy and the strategic perspective of what that poppy meant to funding the Taliban over time. An emic perspective could have better informed policy making through local example.

So, why are emic and etic concepts valuable to SOF? This framing of perspective should reiterate the need to think differently about how to approach and consider access to core beliefs and cultural reality of individuals and culture groups. The Malinowski Model necessitates eliciting data with an emic perspective in mind while recognizing the utility of data must be aggregated to enable an etic perspective. This approach would combine an insider's cultural reality and a more objective comparative view of that reality. "For example, it has been argued that an emic approach serves best in exploratory research, whereas an etic approach serves best in testing hypotheses."[101] Managing the emic and etic perspectives helps mitigate the array of cognitive and cultural biases that inhibit data elicitation and distort the "analysis" of core beliefs, rich points, just so stories, and ultimately TOM.

> The Malinowski Model necessitates eliciting data with an emic perspective in mind while recognizing the utility of data must be aggregated to enable an etic perspective.

Additionally, based on the public construction of social and cultural knowledge, an emic perspective allows entrance into a variety of cultural realities critical to SOF during daily interaction while an etic approach allows a more general understanding of a common cultural reality to fit culture groups/identify markers and provides a foundation to consider future events. Finally, engaging this two-step approach can aid the entrance to and involvement in the social web of relationships in and across culture groups.

Though this may seem to be a behavior unconsciously adopted when interacting with others from a shared cultural reality, the introduction of cultural dissimilarity and risk-filled ambiguity invite bias into the information-gathering process. A heads-on approach acknowledging the influence of these factors on cognition is important. By promoting a process which is

deliberate and qualitatively-rigorous, it is possible to generate more nuanced and effective understanding of not just the evolving construction of cultural reality but how that reality strategically relates to the mission and, more generally, intelligence gathering.

As demonstrated by its intuitive application by the U.S. Marines in Nawa, Helmand, ethnography has extraordinary value for SOF for population-centric missions. Ethnography consists of several different applied research methods, each with critical skills that can be taught in the schoolhouses to elicit the just so stories, cultural rich points, and emic and etic distinctions, and that enable analysts and operators to move from culturally specific encounters to culturally generalizable insight. Over the course of a career and multiple deployments regardless of the region, SOF will benefit from the Malinowski Model's approach to discerning social and cultural knowledge. The

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most difficult aspects of the Malinowski Model are (a) simply appreciating the value of a qualitative approach with respect to the more accepted quantitative approach, and (b) becoming comfortable with the vocabulary associated with a qualitative approach. In the next chapter, the Malinowski Model is brought to life as an applied ethnographic tool. Chapter Four provides a brief survey of qualitative, ethnographic research methods, and the Malinowski Model's application to SOF core activities will become clearer.

Chapter 4. Applied SOF Ethnography

"Applied" Ethnography and Methods

An applied research perspective has matured in social and behavioral sciences, especially anthropology, over the last generation of the disciplines. Applied anthropology is the application of knowledge, method, and theoretical approaches to address the more pressing global and societal issues and problems that affect communities today.[102] Ethnography has been a critical method to this perspective in domains where its textured, multilayered view and access to cultural reality can best inform responses by governments, the public, and private or charitable organizations. These domains include the environment (drought, floods, earthquakes, etc. where the most affected are people living on the margins or in unstable or conflict-ridden regions) education, the aging, health and medicine, nutrition, and even business and marketing. Indeed, many of these areas of concern involve working with many of the same marginalized and peripheral populations and cultures with whom SOF work today. The Malinowski Model is an example of this applied perspective and can feature an array of qualitative methods, of which ethnography plays a central role. As explored already, developing and advancing cross-cultural capabilities, such as cross-cultural competence and cross-cultural communication competence, are critical to be successful in applying qualitative methods.

Applied anthropology is typically research or issues-based and is often fielded through academia or non-profits; the practice of anthropology is an effort that utilizes people trained in anthropological skills and knowledge outside of academia for "practical" purposes."[103] Practicing anthropologists generally work in public service and government agencies, such as the DOD, and though a growing legion of them work in market-based and private industry, many work in community and international development agencies such as USAID, World Bank, United Nations agencies, and international nongovernmental organizations (NGOs).[104] Many of these organizations have worked closely with, or are associated with DOD, and SOF in missions in humanitarian assistance/disaster relief activities in addition to the more prominent environmental, human rights, and health and food-deprivation

issue areas. It is not surprising that anthropologists who worked in the HTS program were aligned with the applied ethnographic methods. HTS members worked in the same cross-cultural space as many of the international governmental organizations and NGOs and have the need for similar, if not identical, cross-cultural capability.

The ability to interact with individuals and culture groups helps increase understanding of local behavior. This capability can also assist with identifying core beliefs and building a robust mode of cultural reality to provide greater clarity to potential future behavior. The applied ethnographer builds relationships with stakeholders in local communities to help seed and implement programs that lead to self-governance and self-determination. The Malinowski Model correlates well to the mission of organizations like Provincial Reconstruction Teams (PRTs) in Iraq and Afghanistan, as well as conventional forces supporting efforts beyond the wire during COIN operations. Although Kedia and van Willigen write that it is "through advocacy that anthropologists build long-term, collaborative relationships with communities"[105] the work of SOF to aid local populations and provincial and national security efforts depends on also establishing trust and dependability.

In their advise and assist roles, SOF, like applied ethnographers, implement, monitor and assess the efficacy of collaborative efforts between personnel and local groups. "From this work, the ethnographer gains a level of intimacy with the program or project and is therefore able to contribute alternate models or develop intervention strategies aimed at altering behavior."[106] Applied ethnographers work toward solution-oriented ends since their fieldwork is designed to support, aid, or further a program, goal, or community-based need. At the foundation of applied ethnography is an intense and self-directed method of participant-observation. Like Malinowski, the efforts of SOF are at least semi-autonomous in mission and operations.

Discovery through observation and inquiry is critical for SOF to affect mission goals and promote influence in real-time, and adapt to unexpected events during missions. The pace of military operations certainly demand an accelerated framework for ethnographically-derived data elicitation and analysis. Ethnographic methods with utility to SOF include participant-observation, focus groups, rapid ethnographic assessment efforts and a social justice-inspired participatory ethnography. SOF missions are such that elements of each can be useful approaches to gaining, understanding and applying core beliefs and elucidating cultural realities. However, elements

of rapid assessment and participatory ethnography can be extremely useful to meet accelerated timelines for engagement with a variety of stakeholders, and to promote collaborative approaches to security end-states.

Qualitative Methods

Traditionally, anthropologists gathered their data at their leisure through their participation and observation. The image of Malinowski sitting on the verandah of his thatched hut while the Trobriand afternoon

Ethnographic methods with utility to SOF include participant-observation, focus groups, rapid ethnographic assessment efforts and a social justice-inspired participatory ethnography.

drifted by is appealing, yet at the same time out of step with the contemporary pace of applied work. Faster turnaround and restrictions on the intensity of fieldwork necessitates modification of current methodology, if not the birth of new fieldwork methods altogether. Even though ethnographic methods have increased in diversity, adapting to the new cultural and social landscapes, the essentials of a century of participant-observation[107] still are foundational as are the stories that make up the fabric of cultural knowledge for both cultural members and ethnographers.

The first method described is participant-observation, which is the primary qualitative research method that provides in depth access to individual cultural realities. A partner of this method is interviewing key informant(s), also referred to as "gatekeepers." The introduction to and trust of the gatekeepers is established through extended periods of interaction. Key leader engagements offer additional opportunities to capture different perspectives from those in leadership positions. Participation and observation allow the ethnographer checks and balances on what has been told, ensuring another filter of validity.

Participant-Observation (PO)

Immersing in the local area and culture groups is the hallmark of participant-observation. The term expresses the duality of the roles, observer and participant. The experience of participant allows access to "insider" knowledge as the ethnographer is part of the construction of that knowledge, while observation requires a certain distance or detachment to consider

the meaning and cultural reality to then understand how SOF efforts fit in that cultural reality.

> Essential to both academic and applied ethnography is the relationship between ethnographer and cultural members. This critical relationship is dependent on the development of trust, good intentions and, more importantly, a sense of collaboration between the ethnographer and those involved in the study or research project. Whereas traditional anthropology was used to elucidate an umbrella-like theory of human behavior, ethnography in support of social issues and concern for human suffering relies on the development of collaboration to be used to address issues.[108]

The method leads the participant-observer in SOF to a subjective role as a participant using the knowledge through that personal investment to gain further access and interaction within the group. This is reminiscent of classic SOF Access, Placement, and Rapport activities expressed through civil affairs units, amplified as well with MISO activities through integrated operations. This study suggests that there is much to gain by providing a theoretically-informed qualitative approach and application that can advance SOF method and outcome.

With genuine access and placement, SOF stand to earn additional knowledge of local dynamics.[109] Interpreting the meaning of that knowledge and applying it to a deeper understanding also requires the participant observer to be objective and attentive to recording context, interactions, and intentions to those active in discovery. Besides observation, other methods include natural conversations, interviews of various sorts, checklists, questionnaires, and unobtrusive methods.[110] These are critical elements not often used in collection of atmospherics, but are essential to expanding what could be insightful and useful information.

As noted earlier, core beliefs underlie patterns of behavior. Participant-observation and other ethnographic methods are most effective in settings that enable the access to "organized routines of behavior" and set the stage for "establishing rapport within a community and learning to act in such a way as to blend into the community so that its members will act naturally, then removing oneself from the setting or community to immerse oneself in the data to understand what is going on and be able to write about it."[111]

SOF relevant knowledge is accessed through social relationships involving the ethnographer and local groups.

The tools and skills of an effective participant-observer are keen observational skills, being adept at writing descriptive and informational field notes (an essential skill as a primary repository for data), cross-cultural competence (including cross-cultural communication), effective interviewing techniques for an appreciation of culture-general knowledge, and the patience of Job, among others.

As a final word on applied ethnography, the method engages both the ethnographer and the gatekeeper from the local population or cultural subgroup in a highly interactive, socially in-depth, frequent interaction. Eliciting the kinds of information necessary requires that both sides enter a trust-based negotiation; the ethnographer realizes that if the relationship goes south, so does the faucet of data from that individual, and interactions with people around the gatekeeper will likely diminish or just as impactful, information provided may not be truthful or accurate. In high risk environments and missions, this can prove to be deadly. There are ways to triangulate data to check for authenticity and social and cultural accuracy between gatekeepers and observation, but if trust is compromised, its effect may extend beyond the inaccuracy of the data.

Focus Groups (FG)

Focus groups can help shed light on cultural behaviors and practices that could potentially be useful in assessing products or exploring the need for a future product or service. Focus groups (FG) are a collection of culturally knowledgeable members of equal or about equal status who agree to reveal their knowledge base under the direction or guidance of an interviewer posing specific questions or topics of experience.[112] Successful focus groups feature a give-and-take of opinion, perceptions, and perspectives which can become a dynamic consensus of commonalities on topics. FG can also provide a forum for cultural members with a range of opinions and beliefs on topics and issues to provide their input to determine the similarity or diversity of viewpoints and to validate them through the triangulation method (different individuals providing similar viewpoints) leading to corroboration. When dealing in applied, neighborhood or community-based research,

focus groups provide essential needs assessment with an evaluation of the program's or project's social and cultural impacts.[113]

Rapid Assessment Procedure (RAP)[114]

RAP produces "sufficiently rich understandings of the insider's perspective for the design of additional research for initiating activities that should be started promptly."[115] Rapid assessment response, engaged from one to six weeks, tackles issues or problems characteristic of the developing world or countries at risk of failing. RAP is often applied to crisis situations such as disease epidemics, environmental disaster, or hunger. RAP is particularly suited for SOF since such areas often lacking stability and security are prone to insurgency or are a terrorist safe haven, and attract large-scale migrations of groups seeking safety from insecurity.

The operational environment where RAP takes place in practice is often similar to where SOF deploy and could therefore aid SOF in their missions to consider solutions or approaches to addressing immediate issues. RAP involves multidisciplinary teams of technical/scientific and social science researchers that focus on the need for accelerated collection of data. RAP teams explain reasons for crises and emergencies and strive to locate solutions to remedy the causes. They also forecast how to integrate the technical remedy in a locally appropriate context, recognizing "there exists the surrounding and as well interfacing cultural facets that are essential for delivery of health service, acceptance of crop or medication that may not be understood as being part of the problem and solution."[116]

RAP involves multidisciplinary teams of technical/scientific and social science researchers that focus on the need for accelerated collection of data.

Methods of participant-observation, such as informal and ad-hoc conversations, interviews with local gatekeepers, and observations of behaviors and practices augment quantifiably-based information. Data gathering may also involve sociocultural data sets useful to SOF, such as census, soil morphology, climate averages, and so on to create not just a population-based "social and cultural map," but also to provide a holistic cultural reality and understanding of behaviors and practices which can inform the viability of solutions and, consequently, the range of feasible options. Even though time

constraints diminish the development of critical and familiar relationships with foreign populations, in crisis conditions commonality of purpose promotes its own set of relationship accelerators that augment the data gathering experience. RAP as an approach, and an attitude, is an effective evaluation technique for quickly evaluating a population's sense of reality, for identifying mid-course corrections in activities, and for determining the direction of follow-on and enduring efforts.

Participatory Research (PR)

PR perhaps can offer the most benefit and value to SOF in environments where interagency programs and projects such as those found in counterinsurgencies are critical to mission objectives. PR has been tied to an overall program of social justice, one that features improvement of quality of life for many disadvantaged and marginalized peoples. In one aspect, it informs policy development and implementation invigorated "democratically" to include those who will be affected most by the policy, that is those "who have been previously neglected or perceived as merely passive beneficiaries or objects of policy research."[117] COIN operations in both Iraq and Afghanistan featured environments, conditions, and populations with the characteristics of those most benefited by PR including ethnic, tribal, or other culture groups living in both marginal communities and developed countries. The DOD response to the Ebola outbreak in West Africa was an example of this approach, as specific endeavors by military and civilian personnel aided developmental efforts to build a more sustained effort against Ebola.

An example of PR is that of Participatory Action Research (PAR)–not to be confused with RAP described above. Advocacy for populations is at the heart of PR, but PAR considers the ethnographer as an active participant in research projects that, through impacting policy revision or development, promote a better quality of life for the underrepresented. At the heart of PAR are ethnographers helping empower communities through education, civil action, and data discovery to better improve conditions.

Another example of PR is participatory mapping (PM) where cultural data is translated by locals in collaboration with applied ethnographers into a geospatial format. PM has "roots in participant-observation and collaborative research [and] represents the fullest involvement of local people who are trained to do research or applied work with the researcher, facilitator,

or team."[118] In a review of PM projects in the Amazonian region in South America, local gate keepers were utilized to develop and distribute surveys, interview local landowners and residents on land use, and help coordinate the development of community maps of cultural and subsistence areas of significance. "Much of the research was utilized by the indigenous peoples to help in management of lands, local empowerment through recognition of territorial boundaries in response to encroaching agriculture, and providing a repository (database) of spatial resources, to name a few."[119]

The U.S. mission Operation Observant Compass in Uganda to hunt Joseph Kony, the head of the Lord's Resistance Army (LRA), provides an application of PM. Green Berets have worked with the local inhabitants who reside in the jungle infested "area of operations … the size of California" to develop a map that is usable by U.S. personnel in their operations.[120] The U.S. commanding officer admitted that one of the most difficult elements of the mission is simply navigating from point A to B. "Out here, the roads exist only on a map," the commander said.[121]

The cultural knowledge of natural terrain is embedded in the view of the local people and is tied to their own recognition of the terrain and the natural features which they contend with when, traveling; how and where they travel, the impact or influence of their own belief system on acceptable trails and paths, who they visit when they travel and other considerations. The SF personnel elicit the cultural knowledge that holds this information from defectors, which turn out to be mostly children. "Their accounts contain locations such as 'the camp near the bee's nest in the hollow tree trunk,' or 'the river crossing near the old pile of bones,' per a U.S. intelligence officer with direct knowledge of the operation." Overlaying the locals' "cultural topography" onto known GPS markers then "enabled U.S. Special Operations Command Africa to build a map of the world, as seen through the eyes of an LRA child soldier."[122] This produced a living dynamic geological and spatial rendering of the critical landscape, but one that was the product of a child LRA soldier and how they saw their entire universe. "The result enabled the Green Berets to anticipate LRA movements. Commanders have used this knowledge to carry out operations that have sharply reduced the remnants of the LRA."[123]

Provincial Reconstruction Teams—Application of Applied Ethnography

> Until a few years ago, no one in the US military would have believed that instead of dropping bombs and engaging in fierce combat, it would one day be drilling wells, directing traffic, building schools and organizing local elections—and that it would be doing all of these things not after but in the middle of a war. Finally, no one would have imagined that these civilian tools would end up being described as the most-effective weapons on the road to victory.[124]

There is a decade worth of programs and efforts that were infiltrated with informal qualitative approaches in OEF and OIF that had varying degrees of success (or failures depending on the perspective of the one offering the assessment). PRTs perhaps provide the best allegory to some of the approaches considered in applied ethnography to include PO, RAP, and elements of PAR. PRTs were project-oriented efforts that combined military and civilian personnel who basically delivered COIN to local populations in the form of human security and quality of life development and reconstruction endeavors to extend the reach and influence of the nascent Afghan government. As Field Manual (FM) 3-24 notes, "PRTs were conceived to extend the reach and enhance the legitimacy of the central government into the provinces of Afghanistan at a time when most assistance was limited to the nation's capital." At the height of their operations, there were twenty-six 100-member teams, 12 of which were U.S.-led while the others were led by NATO-led International Security Assistance Forces members.

PRT missions primarily revolved around four key concepts supporting COIN tasks: 1) engage key government, military, tribal, village, and religious leaders in the provinces regarding local development priorities; 2) build the relationship between the local tribal and regional governments and the Afghan national government; 3) promote the development of Afghan security through the development of the Afghan national military; and, 4) bring humanitarian aid and assistance when needed. A former state department diplomat who worked on PRT teams described the effort as "basically bottom-up diplomacy, bottom-up development, bottom-up counterinsurgency."[125]

PRTs were examples of the kind of efforts that General Flynn et al inferred were necessary to stave off conflict. Through acting as a clearinghouse for most COIN activity in the provinces, PRTs consolidated efforts by the DOD, Department of State, the United States Agency for International Development (USAID), and even the Department of Agriculture (USDA) to build schools and roads, upgrade or in many cases build infrastructure, dig wells, install sewer lines, and implement other community projects. "PRTs represented a less costly venture than standing battalions and brigades and could attend to the population security needs more aggressively and with a greater reach of expertise."[126] Due to this coordination, and on-the-ground efforts, PRT members spent considerable time beyond the wire in pursuit of the developmental and reconstruction mission. Given the emphasis of the military on developing intelligence on insurgents and supporting counterterrorism, PRTs also acted as "eyes and ears" for policymakers and rear echelons to include brigade commanders providing on the ground assessments and working reflections on sociocultural developments characterized as "rapidly morphing multiple insurgencies."[127]

PRTs have been called a "mixed" bag of success and failures for internal reasons, as well as a strategic miscalculation on the time and effort to do COIN "right."[128] Some of those failures can be traced to a deficit of cross-cultural capability in PRTs, especially amongst the military personnel.

> PRTs operate on a very fluid and culturally complex landscape. They more than occasionally misread actions and activities occurring on the ground producing incomplete awareness and an inability to predict future events. In addition, Afghan organizations and agencies and their civil service component are not very advanced and are shot through with corruption issues. Military personnel make up most of the PRTs, creating experience-drain with the 12–18-month deployment cycle of the military. That, coupled with constantly evolving, and not always in a good way, Afghan governance and a society adapting to/or generating new insurgency efforts, has hampered PRT progress and overall the success of COIN.[129]

PRTs engaged in the same kind of projects usually associated with solution-oriented applied ethnography, for some of the same goals and for the advocacy of the local culture groups. Their programs considered multi-agency partners, featured time-constrained environments and confronted

many of the same issues that affect human security in other regions of the world. Yet the PRT mission and goals extended beyond personnel rotations, so losing PRT staff with local and organic knowledge reduced overall effectiveness of the efforts as circumstances evolved over time. COIN in the end was a military-led and driven mission, so PRTs served quite well as intelligence collectors and collators, even though predictive capability was limited at least to the kind of structured intelligence process that was in place at the time.

General Flynn et al provide an example of this conflation of data need and project success in OEF.

> Development officials earn goodwill through small-scale but quick irrigation projects in one district, while officials in a neighboring district see little public enthusiasm as they proceed with an expensive but slowly developing road construction project. Policymakers in Europe and the United States need the "nitty-gritty" details of these projects to detect the reasons for their different outcomes and to assess whether similar patterns exist with projects elsewhere in the province. In short, strategy is about making difficult choices with limited people, money and time. The information necessary to guide major policy choices, for better or for worse, resides at the grassroots level.[130]

It is safe to assume that given the kind of knowledge and skills endemic to a qualitative approach, application of thinking differently and a full range of cross-cultural capabilities, PRT efforts would have been more successful. This of course is based on anecdotal and lessons learned data, since there are no metrics or other formal programs of assessment developed to measure the success of PRTs. However, even though PRTs were phased out in 2014, and there have been no efforts to duplicate them in other regions where U.S. personnel are deployed, the same type of developmental and reconstruction work continues to be done by other USG agencies and NGOs in these same sectors and SOF will directly or indirectly be part of those efforts. PRTs provide a model that reflects the importance of applied ethnography to these kinds of missions.

Discussion

Ethnographic fieldwork offers advantages not available to a desk-bound intelligence professional or even a limited time-of-duration collector. From a tactical perspective, time in the field immersed as an insider with opportunity to participate and observe can promote more faithful renderings of cultural reality through eliciting data from cultural members. Extended interactions and being able to participate in cultural events and activities can promote a deeper cultural understanding and social and cultural adeptness with local populations. The emic/etic distinction applies most readily to collectors and fieldworkers. However, there is a plethora of open source material accessible to those not in the field—much of it first and third persona narrative that can be quite effective for discerning an emic or insider's perspective and can add a social and cultural fidelity to operations. This distinction should also be a consideration of analysts and other professionals as they work toward doing perspective-taking and applying cultural sense making to elicit meaning of foreign cultural behavior.

> *Extended interactions and being able to participate in cultural events and activities can promote a deeper cultural understanding and social and cultural adeptness with local populations.*

SOF missions need a functioning cross-cultural capability to navigate complexity, understand and analyze behaviors to benefit future strategy and missions, and advance local and on-the-ground intelligence to other DOD and U.S. organizations. In other words, efforts to date to understand local culture groups and their behavior have been concentrated at the operational "etic" level at the expense of the tactical "emic" level. It is at this emic level where excavating local meaning from behaviors and activities can distinguish potential threat from normal social and cultural discourse and mitigate the risk of mission failure. This cross-cultural capability is immature in existing SOF capability and lacking in SOF preparation, especially in the learning programs.

It is equally important that SOF become adept at building relationships with the appropriate gatekeepers for collecting information, understanding the relationships and alliances that weave in and out of the areas, asking the right kind of questions, and engaging in the right observational skills to recognize patterns of social and cultural behavior that exist in expressions

such as kinship, exchange, that can provide evidence for motivation. It is important to realize that gatekeepers—those individuals chosen or serendipitously selected to solicit information—come in all shapes and sizes and it is usually the local farmers, shopkeepers, or others who have a unique and telling perspective or view on local events and individuals. Often, it is important to engage gatekeepers across the span of different groups or identities in a local area, class, family/lineage, tribe, occupation, etc. Focusing only on key leaders (KL) will distort the cultural reality being accessed and offer limited understanding and meaning of local behavior.

Applied anthropology and ethnography feature a host of techniques to explore common knowledge and skill sets including observation, interviewing, taking useful field notes, elements of thinking differently, and a command of the understanding of how cultural systems operate. These skills require a cross-cultural capability that earn access to data through successful social interactions such as by engaging critical perspective-taking and cultural self-awareness, looking for rich points, and applying sense making to excavate patterns of behavior and meaning in observation and narrative. Finally, managing the emic/etic perspective of the applied ethnographer can produce significant social and cultural understanding through identifying core beliefs and eventually a consequential model of cultural reality. These skills form the foundation for success in applied ethnography, just as cross-cultural capability can be said to be critical to the different SOF missions. In fact, the skills of applied ethnography are critical for navigating gray zone activities and hybrid warfare where local perceptions and dynamics constitute the basis for activities short of war. SOF certainly have experience in these arenas, but lack the theory and proper training to apply them to the fullest utility to include building an authentic representation of social and cultural reality.

Chapter 5. Thinking and Bias: The Legacy of Human Cognition

> After conducting more than 400 interrogations, as well as working with Iraqi informants, I've had the opportunity to see the enemy as he is, a human being with a range of motivations, loyalties and ideologies. I discovered the enemy isn't crazy or immoral, or twisted, though his reasoning may be alien to the Western understanding of sanity and morality.[131]

Previously the concept of cognitive schemas was briefly introduced. In this chapter, they are explained along with how they drive misunderstanding and misinterpretation when uncritically accepted. The impact of popular "population-centric" military approaches to understanding groups, namely the HT and HD concepts, are reviewed to illustrate the subtle but important influences on how SOF think about and interact with foreign populations.

Schemas represent related patterns of thought that are a result of the makeup of the cognitive system, which is updated as the mind incorporates new knowledge or information. Schemas are "knowledge structures that guide interpretations, inferences, expectations, and attention."[132] Schemas act to interpret incoming information and expand and/or create new schemas to handle novel or surprising foreign behavior. Schemas are interrelated, can be redundant in function, and can process across the breadth of incoming information same or similar behavior, events, and activities. There are schemas for a variety of knowledge sets. Examples include schemas that correspond to archetypes, social roles and social knowledge, worldviews, and cultural understanding that enable "individuals to make sense of their experiences."[133]

Schemas pervade the military—in fact the military could not function without them given the scale of campaigns, the pressures associated with time, and the need to limit the risks to which the force is exposed. These schemas are most clearly associated with basic training, doctrine, analytical tools, and planning processes. Unfortunately, schemas also create cognitive biases and blinders when they become ends unto themselves instead of a means to an end. This monograph likewise suggests a new schema for

cultural understanding.[134] The Malinowski Model is critical to making sense of foreign cultural behavior, but its utility is also self-consciously bounded; the veracity of the Malinowski Model rests on awareness of the influence of schemas and the implicit biases that are carried with them.

The Malinowski Model is critical to making sense of foreign cultural behavior, but its utility is also self-consciously bounded; the veracity of the Malinowski Model rests on aware-ness of the influence of schemas and the implicit biases that are carried with them.

There is a rather extensive understanding of the effect of bias on human cognition over the last 50 years since being identified and defined by Amos Tversky and Daniel Kahne-man in 1974.[135] Human cognition features a group of mental processes that include atten-tion, memory, producing and understand-ing language, learning, reasoning, problem solving, and decision making. Cognition includes accessing and making sense of incoming information. Making inferences about that information leads to forming and sustaining beliefs about the state of the surrounding social, cultural and natural environments; in other words, how one thinks affects what one thinks about. Thinking is also the bedrock of analysis with the mind basically forming a collection of integrated mental models shaped by socialization, collective and individual worldviews, professional imperatives, and cross-cultural experience. These schemas form and are reinforced by a system of beliefs that contextualize meaning and guide individuals' and groups' cultural behavior.[136]

Fast and Slow

The evolutionary development of the human mind is based on an efficient application of schemas. Having to access and then quickly sort through a torrent of information that could lead to either survival or death promoted the evolution of a human capacity to make sense of this information to better predict outcomes—critically important in environments where threats to human ancestors, both overt and covert, are embedded in nature.[137] This is still the case especially for SOF in a very culturally complex landscape rich in threats. Being aware of the influence of and purposefully managing the selection of appropriate schemas is important for many contexts SOF will find themselves in, less so for others. Kahneman casts thinking, or cognition,

in the frame of two systems.[138] System 1 is a fast operating, almost automatic, system that generates impressions and feelings and uses these to construct accurate schemas and utilize predictive capability in familiar environments with little overt thinking effort or voluntary control. System 2 is the slower, reasoned, and attention-focusing system that attends to mental activities that demand complex computations. It is often associated with the subjective experience of agency, choice, and concentration.[139] Slow thinking develops and reinforces an individual's beliefs and provides deliberate choices based on what System 1 generates.[140] System 1 works in a space where input aligns with existing schemas and judgment of input is needed quickly. The outcome of System 1 thinking is to define and focus possible options to a singular path. System 2 works best when there is a complex and/or novel space and the possibilities of judgment are based on innovative perspectives.[141]

The intrinsic and foundational effect of TOM and its implications are profound for working with foreign populations. Cognition, and its inherent ethnocentrism, often satisfies the cognitive imperative to "think like them" by drawing on personally-developed, established schemas sustained by the evolutionary need to align, predict, and create shared intentions. System 1 matters during DA and combat missions, which have as an ever-present variable, high threat environments. System 2 is intrinsic to an array of missions, such as FID, UW, VSO, CA, and MISO. In fact, the case can be made that it is intrinsic to operations and policy formation, but SOF are rarely educated or trained in making System 2 more relevant and supportive of the skills necessary for facilitating a successful qualitative approach.

Unintended consequences of fast and slow thinking occur when novel or new information activate the schemata, and System 1 automatically assimilates the sensory input into existing schemas. In new, novel, or unfamiliar environments and situations, there will be a torrent of new information. Having as much understanding of the social and cultural systems at play can help parse some of that information into existing schemas. Sands argues that a foundation of culture-general knowledge can act as an accelerant to understanding as that knowledge is transferable across culture groups.[142] Based on a series of cognitive actions or behaviors, the interpretation, meaning and relevance of the information and its application as knowledge toward understanding future behavior can be skewed. This is generally referred to as bias, and is a result of an error in System 1 processing. The causes of skewing include ignoring or forgetting input, the recentness of a schemata's

activation, expectation on what is or will be experienced, and the confidence in the schema. Sometimes, even when System 2 activates to aid in processing the complexity of incoming information, these biases often go undetected or uncorrected. System 1 errors, discarding what could be relevant information because it does not align with schemas, is a very real danger and leads to the formation and sustainment of biases, "systematic errors in specified situations."[143] Often, if the input does not align at all or there are holes in the sequence of information, existing schemas will be applied to complete the processing. The effects of cognitive bias are discussed in the next section and later in this chapter.

Cognitive Bias

> Cognitive biases are just tools, useful in the right contexts, harmful in others. They're the only tools we've got, and they're even pretty good at what they're meant to do. We might as well get familiar with them and even appreciate that we at least have some ability to process the universe with our mysterious brains.[144]

Cognitive biases are psychological tendencies that cause the human brain to draw incorrect conclusions.[145] They are the result of how human cognition evolved; thus, they are consequences of a powerful legacy built into human DNA. Some researchers suggest there are over 100 different cognitive biases—and that might be on the low side.[146] Such biases can be considered a form of "cognitive shortcut," often based upon rules of thumb, and include errors in statistical judgment, social attribution, and memory.[147]

Biases are not inherently negative; rather, they are tools to advance cognitive efficiency. To try to eliminate them works against a person's cognitive "wiring" and their essential roles. However, people can attempt to mitigate or manage their unintended consequences in environments and situations where they can do more harm than good.

Bias impacts the reliability and authenticity, or the utility, of socially or culturally qualitative "gathered" data and experience.

Biases impact several areas of how the military and civilian intelligence organizations process and analyze data. Bias impacts the reliability and authenticity, or the utility, of socially or culturally qualitative "gathered" data and experience. It also affects the success of cross-culturally navigating

behavioral complexity and biases related to probability determination or prediction. Finally, decision making can significantly affect the use of the scientific method which is deliberately designed to minimize such bias from any one observer.[148]

With the skills of the Malinowski Model, SOF stand to have even more relevance to the intelligence process. The next few sections draw distinctions between intelligence analysis and the Malinowski Model, and offer a means to prevent to the extent possible the cognitive and cultural bias inherent in a structured analytical approach. Four areas of human cognition are notable in the environments in which SOF operate: information overload, deficit of meaning, the need to act fast, and how to know what needs to be remembered for later (following categories adapted from Benson, 2016).[149] Success in making sense of these environments depends on SOF having to integrate themselves into ongoing local social interactions. These interactions are governed or guided by core beliefs and framed by a cultural reality often foreign to SOF personnel. Being able to access beliefs depends on methods pioneered by Malinowski and adapted and expanded on in contemporary qualitative approaches. All four contain a slew of biases that affect cognitive performance.

1. **Information overload.** The need to filter out extraneous data; prone to confirmation bias.

2. **Deficit of meaning.** Parsing behavioral complexity in limited experience leading to gap-filling with existing personal schemas; finding narrative in limited data; stereotyping/generalizing; projecting thinking onto others, and extending current mindset and assumptions into the future and past.

3. **Speed of action.** Analysis is constrained by the time facing analysis and the need for a solution regardless of the amount and kind of information. When new information is made available, people need to do their best to assess their ability to affect the situation; confidence in ability to effect change; focus on the immediate and relatable vice the distant and complex; drive to complete existing acts that carry investment of time and resources; simplification of options that seem to have complete support versus incomplete/ambiguous support.

4. **Memory prioritization.** Culling through information to retain what is expected to have utility in the future, favor generalizing over specifics due to attention restrictions maintaining active or easily recalled memory; storage of information due to kind and impact of experience; editing of memory post-experience; discard specifics to favor generalities.

These areas play significantly in social and cultural environments that are fluid, often defying behavior expected from mental schemas. Prediction is one such intelligence schema that is often at odds with the local realities that make a qualitative approach necessary.

Prediction

> To the extent that you can find ways where you're making predictions, there's no substitute for testing yourself on real-world situations that you don't know the answer to in advance.[150]

> We must become more comfortable with probability and uncertainty.[151]

Nate Silver says it best when he writes that humans have always had a "prediction problem"[152]—the uncertainty and complexity of the global environment makes prediction today more of a problem. Humans are not very good at it, and, instead of prediction being an objective assertion of the future, Silver states, "we can never make perfectly objective predictions. The will always be tainted by our subjective reality."[153] Accepting human subjectivity, while still striving for a mediated and nuanced objectivity is necessary to get us the best possible outcome that passes as a prediction is all we can hope for."[154]

There are significant limits to prediction in the social realm, as it must factor in the dynamics of the diverse array of ethnic, tribal, and other culture groups that often express dramatically different belief and value systems from those of the analysts. Kahneman writes to the shortcomings of prediction and suggests there are two types of prediction. The first considers empirically-derived calculations and very detailed analyses of outcomes that range across finite and similar occurrences. These kinds of analyses produce a clear measurable relationship between variables such as calculations of fuel usage for planes based on mission-type. This type of prediction involves an almost plug-and-play procedure as the knowledge and the mental

calculations are easily retrievable, and problems that draw on the experience and expertise found in familiar and repeated situations (and embedded in known schemas) and accessible through the fast thinking apparatus which can promote a more accurate prediction.[155]

The second type of prediction overloads System 1 with variables and situations that defy quick or simple associations to solution. This type of prediction is problematic when it considers human behavior in operations—it contains a lot of social and cultural "noise" at first. Initial attempts to discern patterns for prediction produces information that may not be sufficient for understanding let alone analysis. Attempting prediction based on expert intuition, also called thin-slicing by Malcom Gladwell,[156] threatens to muddy already-murky waters and exacerbates the types of inherent biases discussed above. Intuition is the result of how fast thinking relies on schemas to process and assimilate large amounts of incoming information. If a small number of familiar schemas exist in the patterns of knowledge and behaviors (thin slice), then people unconsciously make quick decisions based on minimal amounts of information (intuition).[157] The slow thinking system offers a means to disrupt the potential for flawed prediction while maintaining the integrity of the intuition that is applicable to promoting successful analysis.

Can striving for prediction support the kinds of actions necessary for SOF? This question is pertinent considering that many factors inherently a part of human behavior reflect a dynamism and potential to change in complex environments. Organizations oftentimes lack credible or theoretically-informed understanding of those environments, while also lacking a program to develop critical methods to solicit and interpret sociocultural data to inform analysis and provide assumptions critical in mission success. It is not just identifying patterns, themes, or trends; it includes identifying and assessing what patterns and themes are significant in context. Even more so, SOF need to know how to use that knowledge to better construct social and cultural reality that can serve to ground future missions/operations in a critically-informed understanding.

The development of thinking strategies that help mitigate cognitive biases while promoting knowledge and skill-based competencies in deeper social, cultural and behavioral understanding and behavioral data elicitation can add significantly to future missions. These strategies and methods need to be applied in, as Kahneman and Silver suggest, perhaps the most realistic approach: mitigate "biased, intuitive forecasts and predictions without also

discouraging, delaying or even eliminating the intuitive insights that true expertise provides."[158] The key is to deconstruct the myth of intuition as a power and replace it instead with a pursuit for valid cues based on searching for repeated or regular patterns of social and cultural meaning.

Approaching intuition as a skill that requires training, repetition, and humility will help alleviate its shortcomings in activities requiring deep sociocultural appreciation. In a sense, given the nature of intelligence analysis and the impulse for prediction and forecasting, the accuracy that may have been implied in more conventional analysis in the past may be more difficult to achieve and even harder to measure when applied to the contemporary and foreseeable threat environment. Humans are built to predict, but their cognition has built in tendencies that threaten the utility of prediction as it applies to human behavior.

Moreover, there are also organizational and mission-centric biases that percolate through how the "humanness" is defined, measured, and forecasted. Labels, such as HT and HD reflect the deeper influence of mental schemas on how involvement and end states are conceptualized and cultural reality perceived. The next section briefly explores the bias inherent in the choice of labels and the constructs used to approach, define, and describe the social and cultural complexity engaged in by SOF. In fairness to these attempts, awareness of importance of complexity—and what it means—has been steadily evolving. However, the labels "Human Terrain," "Human Domain," and "gray zone" show a lack of understanding of how social and cultural systems operate. Inherent in the process of understanding is being able to use qualitative methods to extract information critical to this understanding for the benefit of an overall strategic goal.

Labels, such as HT and HD reflect the deeper influence of mental schemas on how involvement and end states are conceptualized and cultural reality perceived.

The HT and HD Schemas

> We cut nature up, organize it into concepts, and ascribe significances as we do, largely because we are parties to an agreement to organize it in this way—an agreement that holds throughout our speech community and is codified in the patterns of our language.[159]

Adapting to a population-centric approach in OEF and OIF requires an informed and bias-free way of grasping the human element in how SOF addresses cultural complexity. The use of concepts such as HT and HD may have provided a sense of familiarity from which to operate, but those concepts also carried with them a legacy of conventionality and operational and cultural bias which created unintended consequences in terms of limiting development of more grounded policy, doctrine, and strategy and limited the development of a broader culture learning effort.

The DOD has characterized, classified, labeled, and parsed the cultural complexity that is encountered in deployments through the lens of mission and operations. This has created a focus that impacts the success of building and sustaining enduring relationships critical for methods of discovery and application of social and cultural knowledge—short term span of operations, and short term attention, lack of primary attention to cultivating relationships necessary for knowledge elicitation, etc. From a military standpoint, that is what should be done. However, the current direction of partnership building is incorporating knowledge and skills that support components of IW, COIN, UW, FID, and less conventional warfare. Since a large focus of military involvement with the cultural other may not involve warfare, conflict or conventional missions, the DOD has difficulty interpreting the human element through existing perspectives. This restricts and limits the understanding of how human behavior is conceptualized and the development of an accurate and authentic cultural reality of others. In other words, labeling, defining, and describing the human element and behavior through traditional military means using concepts developed for military action affects the bias of military organizational goals and the essence of success.

Two schemas, HT and HD, reveal this effect and provide an example of the inherent power and danger that labels and approaches used in SOF policy and doctrine effect how reality is conceptualized and acted on. HT, and later HD, were artificially rendered as spheres of human events, activities and interactions as a terrain or domain, as if the free agency of actors and their intentions can be translated and bounded within a distinct spatial rendering, matching other physical or virtual spaces. Often, intent and need of organizations is a limiting factor on how useful a concept is and can be. This can be seen in the use of the label of HT, but also more generally in application of labels that are borrowed from the operational culture of an organization. The use of HT greatly influenced the development of culture learning programs,

directing focus to its military application and less to understanding important aspects of human behavior that have enduring, positive impact on the operation beyond immediate return on learning investment.

HT

U.S. Army General David Petraeus, in his Senate confirmation hearing noted that in Afghanistan, as in Iraq, "the key terrain is the human terrain." He and other military leaders believed that without that understanding and that hold on it, "we continue to be confused by the complexities of their culture, faith and society; oblivious to their desires, grievances and opinions; distracted by the lies and distortions of our enemies; and blind to opportunities to enhance our reputation."[160]

Faced with the need to address a less conventional mission in Iraq, the DOD had to contextualize an unfamiliar environment to thousands of U.S. and coalition troops. General Petraeus introduced the concept of HT into the lexicon of COIN as a trope to capture the human element in layman's terms for the military. Early references to the Human Terrain are found in a report by the U.S. House Un-American Activities Committee in 1968 about the perceived threat of the Black Panthers and other militant groups—a time when U.S. agencies were grasping for a way to link population control back to their efforts to engage in domestic COIN against such groups. "Traditional guerrilla warfare … [is] carried out by irregular forces, which just about always dispose of inferior weapons and logistical support in general, but which possess the ability to seize and retain the initiative through a superior control of the human terrain."[161]

A 1972 publication latched on to HT about social control and urban guerrillas, specifically Latin American insurgents. "[T]he failure of the rural guerrillas to enlist large-scale peasant backing in most areas also showed up in their distorted view of the political potential of the peasantry and their failure to study the human terrain."[162] Air Force Colonel Ralph Peters resurfaced the term in 2000 in "The Human Terrain of Urban Operations," where he linked HT to a city's "human architecture … the people, armed and dangerous, watching for exploitable opportunities, or begging to be protected, who will determine the success or failure of the intervention." Adopting a perspective not rested in any pertinent cultural theory, Peters referred to an array of social components of cities, "'hierarchical,' 'multicultural,' and

'tribal'" and then operationalized that human element as being the focus of military missions "in urban operations is never a presidential palace or a television studio or a bridge or a barracks. It is always human."[163]

Peters catalyzed a term and perspective that carried with it meaning that included social control, mission perspective, conquest of land and peoples, as if one could capture, hold, or win the HT as one could capture and control an enemy force and presupposes the vagaries and complexity of human behavior can be "mapped." The human population became an element of the land to be controlled, which can be siloed into "cultures" that populate the terrain with confidence that these groups are monolithic and distinct. HT became a meme, a trope, in a time before the concept of "viral" took off. By the time General Petraeus tapped into it, this trope was riddled with biases that would influence the perspective of people while reflecting on the U.S. military negatively in the eyes of academics and others with population-centric expertise outside of the military. Anthropologist Roberto Gonzalez, a fierce critic of the military's COIN efforts, suggested:

> The unusual juxtaposition of words portrays people as geographic space to be conquered—human beings as territory to be captured, as flesh-and-blood terra nullius. … Human terrain is often contrasted with geophysical terrain—a familiar concept for senior officers trained for conventional warfare against the Soviets. It implies that 21st-century warriors will fight 'population-centric' wars … ; therefore, the key to successful warfare is the control of people.[164]

The use of HT carried with it implicit and overt biases that are tied up in the linguistic use and the residue of its origins. By attaching the concept of "human" to that of terrain, and the order of how the two words are connected, human becomes a modifier to the concept that still retains the centrality of the overall meaning. The use of the HT heavily influences the perceptions by those casting such understanding over the groups of people and individuals in the mission space. It ultimately reduces the focus on behavior to location and only those behaviors that connect to the mission, diverting attention away from the importance of beliefs and cultural expressions of those behaviors that are not seen to be critical to the mission, yet that actively influence that society. The legacy of the term carries with it military associations and actions that can easily work against trying to establish partnerships. For many, HT was a space to be battled over and won; physical and

social control does not invite active and voluntary association. "Taking and holding the Human Terrain is the essential prerequisite for ultimate success in Afghanistan, as it was in Iraq. This battle for control of and support from a contested population can only be won if we understand the Afghan people, whose cooperation, trust and support we are trying to secure."[165] The less deterministic expression that qualified this approach, "winning the hearts and minds" still carried with it the sense of battle. Additionally, as Gonzalez wrote, for those groups that are the subject of actions within COIN, FID, and UW, to be considered terrain promotes an imperial or colonial perspective.

HD

The demise of COIN in the central focus of U.S. military policy, doctrine, and strategy has taken the emphasis away from lessons establishing the primary importance of knowing the ethnic, tribal, and cultural makeup of the local population. The critical understanding of the intricate web of beliefs and values and the cultural expression of those across the population is also disappearing from learning programs. This has led to a reframing of the relationship between the population and mission. Emphasizing the relationship and its importance in the two critical general missions of partnership building and quick strike capability, there was a shift from HT to HD, from a specific application to strategy and operations to one that emphasized and seeded the importance to the underlying foundation of how military goes to war, as one of the critical objectives to control or dominate for victory or success. The HD joined air, space, land, sea, and cyber as critical environments to securing military objectives, specifically the physical, cultural, and social environments that exist within a conflict.

One of the earliest uses of HD was in a 2013 seminal white paper, "Landpower Strategy: Clash of Wills," written by Army General Raymond Odierno, Marine General Amos, and then USSOCOM Commander Admiral William McRaven. The paper announced the importance of a population-centric approach to warfare while tying it to the importance of geography, anchoring it in those services that are active in securing the land domain, and then back to terrain, or Domain—key terrain that needs to be dominated in order to achieve success.[166] Retaining the connection to terrain, the definition of HD expanded to include a swath of "environments," while also cross-cutting the other key domains. "The domain does not coincide or align neatly with

spatial boundaries defined by geopolitical, physical or environmental variables; one cannot draw absolute boundaries around the human domain."[167]

The concept of HD became integral to the reemergence of SOF as the primary combat force, as well as the spear tip for any IW activity. SOCOM Commander Admiral McRaven opened up the aperture on the HD by defining it as "the totality of the physical, cultural, psychological, and social environments that influence human behavior to the extent that the success of any military operation or campaign depends on the application of unique capabilities that are designed to influence, fight, and win in the population-centric conflicts."[168] In 2015, SOF released a detailed position paper on "Operating in the Human Domain," which did not feature an actual definition for human domain but did attribute properties that reflected the human elements: "the social, cultural, physical, informational, and psychological elements that influence human behavior."[169]

The reconceptualizing of human involvement from terrain to domain attempted to move the emphasis from one couched in a direct connection to contested land to a broader trope of the importance to the overall domains of mission success. Yet, the attempt to align it with concepts that have distinct physical boundaries obscures the difficulty in doing the same for a perspective that is often reflected in human behavior that cannot be easily reproduced with physical or observable properties, where the human domain still carries the legacy of space. "For as much as the position that the HD is more reflective of the human role in the equation of mission, its analogy is to a concept that has as its predecessor in the notion of space.[170] The SOF perspective of HD continues this alignment: "Yet SOF, following the Army's lead, is attempting to apply the physical domains' constructs to this social domain. The human domain implies the 'social' realm: a dominion of non-visible abstractions that, although mostly falling outside of 'the scientific' are nonetheless real, if real means to have an effect on others."[171] This perspective also alludes to a difficulty in the translation of the concept to an already existing framework comprised mostly of physical and geographical boundaries. In addition, the recasting of HD as a critical space continues the implicit bias toward conventional elements and approaches in policy, doctrine, and strategy. Other views suggest a more overt expression of this bias in relation to the theme of the failure of COIN, necessitating a return to essential warfighting capabilities. "The Human Domain inadvertently obscures the negative lessons learned from ten years of conflict, thereby shifting focus

from making the right investment choices on Doctrine, Organization, Training, Material, Logistics, Personnel and Facilities. … The 'Human Domain' is an invalid term and it is not equal to the other domains used in the joint lexicon."[172]

A final inference about the use of HD also suggests in this concept that learning necessary for "success" in the HD can be accomplished through existing military learning programs with association to other military learning objectives. "Approaching the physical domain in more of an objective and logical manner may work, but approaching the social realm without relying more on multiple viewpoints and critical and creative thinking is a recipe for disaster."[173]

Recently the schema of the gray zone has been utilized to help define space and condition where most of SOF' overall mission will take place. The gray zone is an attempt to capture or define the boundaries of action and behavior of others that must be considered and then acted on through a range of gray zone operations. The need to apply the concepts of space and boundaries to the gray zone and the ambiguity and cultural complexity of the concept again tasks military policy and doctrine writers and leaders and operators alike in conceptualizing what the gray zone represents. Attempts to define the gray zone reflect the continued uncomfortable relationship that the U.S. military has with ambiguity of mission and outcome in many of their non-kinetic operations. It also signals the lack of social, cultural, and behavioral theory and application, and the inadvertent and overt limitation that policy and doctrine have downstream in terms of preparation and learning about populations, cultures and behavior.

The gray zone is an attempt to capture or define the boundaries of action and behavior of others that must be considered and then acted on through a range of gray zone operations.

Existing schemas operate to fit meaning of behavior into existing mental categories influenced by a host of variables inherent to DOD and SOF approaches. Redefining schemas do not necessarily negate the organizational or individual biases that exist when conceptualizing or trying to operationalize efforts concerning understanding or the lack of appropriate understanding. These attempts to characterize the human element invoke cognitive and cultural biases that effect categorization of appropriate behaviors across peoples and populations.[174]

Beyond the pitfalls of capturing human behavior in concepts that are not grounded in theory, applying the intent and utility of the Malinowski Model in this "new" mission concept can help alleviate the natural biases of organizations while providing the appropriate knowledge and skills necessary for centering perspective on missions and operations that have been identified as activities in the gray zone.

Chapter 6. Notes on the Limitations of the Malinowski Model

The Bias of Privilege

As much as Malinowski and other golden age anthropologists tried to make the study of human culture the science of human culture, the anthropologist became a confounding variable in that equation, or perhaps, the bias of the anthropologist emerged as a critical enabler of agency and agenda. Upon Malinowski's death in 1942, a diary was discovered in his papers. His widow kept the diary and a decade later two more diaries showed up in office papers from London. His wife stored all three away, and a decade or more later during a visit to Malinowski's publisher, she spoke of them and the publisher went ahead and translated all three. In 1966, after much soul searching, she published *A Diary in the Strict Sense of the Term*, and forever altered the perception and perspective of the ethnographer.[175]

In the diary that spanned his fieldwork, not intentionally authored for public release, Malinowski's non-scientific side was laid bare and feelings and emotions of his work, the islanders, and even his family back in Europe were put to paper. The words captured vivid passages of a man alone, away from family and friends, missing his fiancé, battling frequent periods of depression, and all too often sickly from tropical diseases. Passages starkly present Malinowski's feelings of superiority over the Islanders and their perceived lack of intelligence. Frustrations with the pace of fieldwork and the perception of the Islanders as lethargic and lazy permeated his prose. Malinowski's *Argonauts* is classic, devoid of any personal reflection or intimacy tinting the description and analysis, but lying beneath his veneer of objectivity is a fieldworker caught in the vice of cultural and cross-cultural interactions that obviously clashed with Malinowski's own cultural beliefs and values and produced a diary full of bias, stereotyping, and racism. The publication of the diary unleashed a tsunami of critique against the early iconic anthropologists and laid bare and visible the researcher's bias of privilege and culture that forced the discipline to confront the impact of the researcher on any sense of scientific objectivity that was offered up.

Malinowski's diary is evidence of personal biases that can influence both cultural interactions and the observer's ability to adequately validate cultural reality of the "other." Upon its first publication in 1967, the diary was referred to as a "revealing, egocentric, obsessional document" by one reviewer and by another as a "gross, tiresome" diary that showed Malinowski as a "crabbed, self-preoccupied, hypochondriacally narcissist whose fellow-feeling for the people he lived with was limited in the extreme."[176] Yet, just two decades later, the diary was seen as a "backstage masterpiece of anthropology" and a "crucial document in the history of anthropology."[177] Filtering out those biases is critical to building an authentic and valid cultural reality and useful understanding of the social and cultural behavior of others. While *Argonauts* appears to be devoid of Malinowski's feelings (evident in his diary), research suggests that bias can unconsciously influence or even block off avenues of inquiry and restrict an expanded exploration of behavior. Malinowski, as a giant in anthropology research, was as impacted and influenced by biases that all people, including SOF, bring with them in deployments and assignments. Earlier, a host of built-in biases, including cognitive, social, and cultural biases, were considered and an approach to defuse and mitigate them was offered. Malinowski utilized his diary to accomplish some aspects of bias mitigation by diverting it to an alternative expression. "Thinking differently" promotes management of biases; diarying might be an effective mechanism. The importance of documenting the field experience will be returned to later.

Malinowski, as a giant in anthropology research, was as impacted and influenced by biases that all people, including SOF, bring with them in deployments and assignments.

It is critical to distinguish between promoting the management of bias, especially social and cultural bias, and that of pressuring SOF personnel to deny core beliefs or questioning what many would consider human rights. One of the authors through his career with the DOD interviewed many military personnel who struggled with the sharp differences between belief systems and behavior among Iraqi and Afghan culture groups and what they considered to be American belief systems. There have also been narratives in publications that starkly have painted behaviors, such as the treatment of females, the adoption of adolescent males as concubines and honor killings among others that have led to at least divided approaches to missions. It is

the contention of this monograph that a precursor to limiting the social and cultural dissonance that is experienced in extended deployments by SOF is the development of the cross-cultural capability and the application of the Malinowski Model during missions. In effect, this suite of knowledge sets and skill-based competencies enable SOF to develop a deeper understanding of why and how these behaviors exist and their meaning in the cultural system overall. This approach suggests the notion of cultural relativism—a bedrock assumption necessary for the social scientist to consider differences between culture groups—in a way that accounts for the differences as a search for meaning.

Rosado suggests engaging disparity and extreme differences through inquiry while prompting working toward a common or necessary goal.[178] Kottack contends that moral judgements cannot be ignored, but confronting those that seem contrary head on through discovery of origins can also mediate belief and value conflict through understanding[179] while searching for understanding and reason for behavior. In addition, and germane to SOF and the Malinowski Model, this process can operate to promote further interactions with the culture and its members while seeking understanding.

In this sense, many engage cultural relativism beyond the original utility of straining away the tendencies of humans to apply their own worldviews to dissimilar behavior to understand meaning to those that practice that behavior. However, relativism when viewed as a process can reveal much about motivation for behavior and cultural coherency of behavioral patterns.[180]

From the perch of over a century later, Malinowski's groundbreaking work introduced understanding, method, and universality that are still critical components of anthropology, and at a broader level, the social science research process. Malinowski spent almost four years living with and learning about a group of seafaring people that inhabited a series of islands in Melanesia. He pioneered an investigative method that went beyond the collection of secondary and tertiary accounts of travelers and traders to build a systematic and formalized process that not just developed a comprehensive understanding of Trobriand culture, as much as culture was conceptualized by a universal model of the human condition. From the same perch, the influence of the researcher/fieldworker on the investigative enterprise is now accepted as an element to be considered and, in some cases, has become a central focus of method and product.

Malinowski's research and writing, as well as the effect of his own cultural influences and bias, offer valuable lessons and directions to SOF as their missions and operations now take place in more turbulent and complex world. Like Malinowski, SOF need to better understand and make sense of foreign cultural behaviors, offer a more theoretically-informed and qualitative methodology to elicit culturally relevant information, and then provide a relevant analysis of meaningful patterns of behavior to consider potential future behavior in known situations as well as in unknown situations. The next section will introduce the underlying theoretical and methodological assumptions of a qualitative approach and its direct application to ethnography. Critical to this section is the acceptance that this kind of immersive, field-based approach is a valid and useful approach to accessing core beliefs that aid in developing cultural reality, necessary to contextualize information for further utility to future operations and intelligence needs.

The Issue of Validity and Reliability: Breaking Down the Bias of Positivism

Military and intelligence analysis revolves around heuristics, use of experience to help drive toward conclusions, and a structured process that depends on the systematic, empirical (objective) examination of natural world phenomenon. There is far more comfort in the belief that there is a fundamental connection between the event or behavior and empirical observation if it is a quantifiable measurement. In a sense, if it can be measured as a statistic, it must exist beyond the reality of the individual observing it and hold true for actions or events given similar circumstances. Two concepts apply to assessing the veracity of both quantitative and qualitative research, yet the meaning of each differs with the approach utilized and the use of results.

Reliability and Validity in Quantitative Research

In quantitative research, the accuracy and reliability of findings is critical to the use of those findings to predict future events. Validity refers to the extent to which the phenomenon is accurately measured, or the correctness of the findings, and reliability considers the accuracy of the instrument used to measure the results, "the extent to which a research instrument consistently has the same results if it is used in the same situation on repeated occasions."[181]

> A simple example of validity and reliability is an alarm clock that rings at 7:00 each morning, but is set for 6:30. It is very reliable (it consistently rings the same time each day), but is not valid (it is not ringing at the desired time). It's important to consider validity and reliability of the data collection tools (instruments) when either conducting or critiquing research.[182]

When it comes to applying a quantitative approach to social science research, one is after the measurement of human behavior, "using measurement instruments to observe human behavior. The measurement of human behavior belongs to the widely-accepted positivist view, or empiric analytic approach, to discern reality."[183]

In social science discovery, the investigation of phenomenon being observed—human behavior—does not occur in laboratories or usually in tightly controlled environments. As it applies to sociocultural analysis, measures of employment or education levels are indices that represent observation of behavior. The measure itself represents, for instance, how many surveyed people in that population indicated they had a certain level of education. It also measures that population at a snapshot in time, when the survey was taken and tabulated. When applying validity, is that breakdown in education level an accurate representation of that population and was the method or instrument used reliable, or the right tool to give you an accurate assessment? If the survey was "built" right and administered correctly, if the survey was given to enough people to be considered a significant sample size, and other methodological "ifs," then more or less, the percentages or even raw numbers can be suggested with some level of certainty to be an accurate assessment of that population. What can be done with that measure is limited based on the focused nature of the discovery, and as seen in sociocultural analysis, that measure can be used to help paint a snap shot view of variables. In concert with other variables and measures, a statistic can provide a relatively informative picture of a population, but the measures do not allow inference to a host of attitudes and feelings, and meanings derived from the measure for those who have specific education level, i.e. high school vs. bachelors vs. doctorate vs. law degree, degree granting institution, i.e. non-profit vs. for-profit, community college vs. Ivy League, vocation-based vs. liberal arts; all of these distinctions offer further information about the respondent, but these measures as description also reflect the bias of the

investigator and the effect of his or her worldview. Perhaps, to the population being investigated, education level is not important or useful.

A qualitative approach to the population and the very specific education level probes meaning and behaviors around that measure. Questions consider what the education level means to those who have or not have it, what opportunities the education provides, whether the meaning of that education has changed, if the respondents are satisfied with their education, the effort and resources it would take to get to that level, what that education will provide, and more. The answers to these questions might likely differ substantially, or not, depending on who is asked, and the connection and meaning of that education level with other variables such as poverty levels, or perhaps even religion. Observation and answers to these questions do not result in measures, but meaning. This approach is based on a different interpretation of validity and reliability. The information gleaned can be very useful in finding out feelings, attitudes, and motivations of individuals and groups, and core beliefs that can provide a deeper understanding and appreciation of relationships, meanings, and potential future behaviors.

Reliability and Validity in Qualitative Research

Determining the utility and accuracy of qualitative research considers a different approach than employed in quantitative research; namely that quantitative research produces empirical, measurable outcomes to arrive at a conclusion, and any statements regarding the acceptability of the results or the methods used refer directly to the measures. The nature of qualitative research by now should reflect the absence of statistics or mathematical expressions, hence attempts to consider the soundness or fit of data produced in the discovery process cannot rely on similar assessment criteria.

This inability to apply similar standards to qualitative research typically bias against the use and perceived utility of this approach in military and intelligence processes and analysis. "Qualitative research is frequently criticized for lacking scientific rigor with poor justification of the methods adopted, lack of transparency in the analytical procedures and the findings being merely a collection of personal opinions subject to researcher bias."[184] In fact, there even is disagreement within disciplines that primarily engage in qualitative research if attempting to fit such concepts as validity and reliability is appropriate, "Although the tests and measures used to establish the

validity and reliability of quantitative research cannot be applied to qualitative research, there are ongoing debates about whether terms such as validity, reliability and generalizability are appropriate to evaluate qualitative research."[185]

Yet, there still needs to be evaluative criteria for assessing the "quality" of the research, and the applicability and generalizability of the data derived from observation and interactive means, such as interviewing, beyond the specific context. As the concepts of reliability and validity reveal characteristics of the research and findings in a quantitative approach, appropriating the intent of the concept continue to reflect the same concern, "in the broadest context these terms are applicable."[186]

In qualitative research, validity refers to both methods used and accuracy of findings, "to the integrity and application of the methods undertaken and the precision in which the findings accurately reflect the data."[187] Reliability offers an evaluation of the regularity of research approach, or the consistency of analytical approach and methods.[188] Concern is more based on issues of transparency of method and the ability of multiple researchers approaching similar findings. More specifically, validity of research considers credibility and transferability, while reliability reflects the dependability of the results given other circumstances. Internal validity is represented by characteristics of the findings to those researchers not involved in that research event, and as well to the participants providing a litmus test on how well the findings reflect their reality "to the believability and trustworthiness of the findings. This depends more on the richness of the data gathered than on the quantity of data."[189] External validity references the ability of others to transfer the results to other contexts and populations, more specifically, the generalizability across situations, contexts and groups.[190] Reliability focuses on the dependability of the findings and greater consistency reflects greater legitimacy of the research and methodology used.[191] Lastly, the influence of bias on the researcher and the findings is always a concern. "Researchers bring their own unique perspectives to the research process and data interpretation can be somewhat subjective in qualitative research."[192] When research is conducted by others, corroboration of findings, given that all researchers bring unique perspectives based on personal history and experience, certainly speaks to the minimal effect of bias.

A critical methodological approach that promises greater reliability and validity is triangulation. In a quantitative approach, research findings across

investigators are validated when at least one additional researcher repeats the findings at a different time or attempt. Qualitative studies do not feature the same type of replication as laboratory-based social science research because qualitative research occurs in natural, everyday settings, which will always contain unique features often unreproducible in a second setting, or even in the same setting at a different point in time. Triangulation offers an approach and process that minimizes potential influence of research, cognitive and cultural bias.[193] By engaging an array of investigators, methods, and respondents the limitations of a study conducted by one researcher is relaxed.

> By combining multiple observers, theories, methods, and empirical materials, researchers can hope to overcome the weakness or intrinsic biases and the problems that come from single-method, single-observer, single-theory studies. Often the purpose of triangulation in specific contexts is to obtain confirmation of findings through convergence of different perspectives. The point at which the perspectives converge is seen to represent reality.[194]

In field-based qualitative research, triangulation can be eliciting data from different respondents based on a similar observation and interview protocol, context and questions asked. For SOF, their missions and operations engage a range of stakeholders that represent groups and organizations. Opportunities exist where informal observation and opportunistic periods of conversation can promote triangulation. To borrow the metaphor of triangulation when used in surveying, the more perspectives and attitudes (and core beliefs) that are known (points, elevations, etc.), the more authentically accurate the composite cultural reality is accessible and retrievable (geological points leading to an unknown locations). The value of a qualitative approach extends beyond accessing and understanding core beliefs and formulating TOM, and has great utility when referring to the SOF personnel's own worldview.

A Cautionary Note on Validity and Reliability in Qualitative Research

As in any research approach, there exists potential to produce faulty or imperfect findings due to any number of theoretical, methodological, or researcher-induced problems. For qualitative research, many of the issues

that could ultimately affect results are related to method and involve data exchange as well as mitigating and/or managing existing researcher bias. For those that revolve around data exchange, issues such as sampling and proper instrumentation (to include proper and frequent "field notes" and accurate thematic coding of interview texts as examples), response bias and preparation of respondents, leading inquiry to overly influence responses, difficulty in accurately communicating with respondents due to language barriers and/or interpretation equivalence, and others require active awareness of their impact on the accuracy of data retrieved. Other issues may lie in

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the knowledge and field experience of the researcher such as not fully operationalizing elements of culture active or visible in observations and the social exchange of data; there may be problems with making the conceptual leap from understanding a culture-general approach, and those cultural universals, to applying them to understand how those elements are configured and expressed in the cultural reality. Another issue may result from researchers not fully engaging cross-cultural skill-based competencies to effectively build and sustain the relationships with stakeholders and respondents necessary to maintain access to individuals and groups for data elicitation. One issue that relates to field-based methods is the awareness and management of the emic/etic cultural perspective used by the researcher.

In an approach and method that pushes active engagement with data sources and a reflexivity of how the researcher impacts and influences meanings that emerge in social interaction and even active participation, the utility of its findings and use in developing strategy and future actions in SOF missions can be a critical enabler to mission success. Results can as well be an authentic conduit of critical cultural information and understanding "up the chain" to the benefit of intelligence needs. The implication of the Malinowski Model is that SOF can engage elements of a qualitative approach and research/method to promote a fuller understanding of those groups that are part of mission and operations by accessing core beliefs and ultimately developing an appreciation for their cultural reality. Knowing this reality serves multiple missions and organizations. First and foremost is a foundation of understanding in which current and future actions, strategies and

end states of the SOF mission that involve local culture groups can be built on and around. Additionally, this fuller understanding of these groups can be communicated in various ways to organizations that work in same locales with same culture groups.

Finally, an underlying premise of this chapter, and monograph, is that social and cultural reality exists in multiple versions and are held by different individuals and culture groups, to include SOF. Each are authentic and true to the holder and hold the key to understanding the power of core beliefs and their influence on behavior. Validity of the realities is based on how accurate that reality is to the individual or group and how much of each reality is captured through qualitative methods, to include bias mitigation, perspective-taking, motivation to observe, and participate, accurate note-taking and reflective analysis. Perhaps of all the components that feed into a cross-cultural capability, the most important is the skill to consider multiple realities and track back and forth between emic and etic perspectives of all actors. In this case validity is not tied to a single perspective, nor is there just one reality that is valid across all realities. To achieve effective influence in securing mission goals, one needs to consider how those goals can be achieved by bending existing realities to a common end state. It may also be often that mission goals resist rigid adherence and instead must be open to flexibility and interpretation as one becomes familiar with other realities; in this case, validity becomes the most accurate barometer to measure how well that is being accomplished.

Chapter 7. Developing a Sustainable Learning Program for Qualitative Approach and Methods

> Let me begin with ethnographic encounters. Simply put: in the conduct of our research, we meet people. We talk with them, we ask them questions, we listen to their stories and we watch what they do. In so far as we are deemed competent and capable, we join in.[195]

The classic anthropologists-turned-ethnographers approached their first fieldwork experience as a rite of passage. From one perspective, fieldwork for the anthropologists certainly bore out many of the same experiences that confront SOF as they began their careers abroad. There were no "methods" courses for early ethnographers like Malinowski, Evans-Pritchard, and Margaret Mead; there were hardly anthropology departments in existence in the early 1900s! As is now apparent, fieldwork progresses at a gradual and measured pace due to establishing trust and familiarity with those involved in the research. Nevertheless, this pace can be punctuated with periods where actions or activities act to accelerate, hasten, or even retard progress.

Clifford Geertz relays his experience of arriving in the Bali village where he was to do his fieldwork and enduring distant and aloof villagers for a time.[196] Cockfighting was an enormously popular pastime for males, but also outlawed by the Balinese government. Rural villages far from the daily reach of the government were the sites of cockfighting events that featured most villagers betting large amounts of money. Cockfights were often raided by government authorities. Not long after arriving in the village, Geertz and his wife were attending a cockfight and government authorities raided it. Instead of opting to stay and likely get out of any punishment due to his privilege as a guest of the government, they chose to scatter with the rest of the villagers and evade capture. They took refuge in a villager's home and avoided the dragnet. Geertz wrote after that episode, the villagers responded to him differently and conversation between Geertz and villagers was no longer forced. His fleeing of authorities and his behavior indicated a willingness to participate, and share the consequences, of village life.

Often, it is not so much the training to be an ethnographer that leads to success, it is utilizing moments like Geertz's to establish a lasting and trusting relationship with those who are a part of fieldwork. That is why most academic ethnographic fieldwork is long-term and involves a commitment to patience, trust, and hard work. On the other hand, much applied ethnography, due to the nature of its utility to confront time-sensitive and issue-based problems, operates at a pace that precludes years of fieldwork. Instead, success reflects a balancing of acquiring necessary data to help understand and determine a course of action. Often that data should come with the assistance of the local population, while also building an adequate sense of patterns of social and cultural behavior that reveal understanding about how to best implement solutions to the problem within the confines of the local culture. In these cases, active participation and collaboration of the ethnographer found in RAP and PR methods, as well as a deep experience in past fieldwork, can be a catalyst for success.

All of this to say that effectively using a qualitative approach requires a mixture of knowledge and skills that come from a learning program and process that:

- is guided by educators and mentors and is self-paced;
- marshals a sense of theory of a qualitative approach and related methods, and practical application of it;
- is seeded by a fundamental knowledge of cultural systems and the ability to use that lattice to discern patterns of behavior;
- develops cross-cultural communication skills most useful for discovery;
- allows for experiential learning to improve cross-cultural capability and skills critical in a qualitative approach; and,
- promotes "thinking differently strategies" critical to effective use of a qualitative approach.

This chapter outlines a learning program that can promote this capability given the current SOF language and culture learning approach. It is acknowledged that the intended result is not to remake SOF into applied ethnographers, or even anthropologists. It is instead to provide a knowledge and skill set that can be utilized to better understand and act in cross-cultural complexity and promote more effective recognition of a cultural reality that allows for better collection, analysis and development of a potential

repository of likely future behaviors and occurrences. Doing good ethnography does not mean you must be an ethnographer by trade; good ethnography can inform and provide a better comprehension of social and cultural factors necessary to finding the best solution for mission success. Engaging a qualitative approach can also provide a foundation based on an authentic cultural reality to build a new or refine future strategy. In RAP and PR, the reason for ethnography is to provide a better assessment of a problem by examining the social and cultural variables and reality(ies) of culture groups impacted by human or natural causation and discovering first, how culture groups are affected by the impact and then how culture can best be used to help promote a solution. The use of applied ethnography in PRTs and in Nawa, Afghanistan, offered a fitting example of how this type of discovery and ongoing application of results can play an important role in mission success. Applied ethnography offers keys to the development of qualitative skills.

Learning

Sands assessed SOF language, region, and culture programs and found it to be asymmetrically skewed to language and lacking adequate region and culture emphasis.[197] He suggested a reformulation of intent and curriculum to one that considers braiding language and culture elements over the length of the class, introducing a blended delivery through a centralizing learning management system, allowing for a multidisciplinary cadre of faculty, to include language, social science experts, and instructional designers. He also in this monograph and elsewhere pushed for an assessment program that relies on performance exhibited in instruction based on three critical measures, language proficiency, culture and region general and specific knowledge, and cross-cultural interaction.[198] This entire learning program is designed to introduce and advance cross-cultural capability that reflect an array of thinking, learning, communicating, and application of knowledge and skill-based competencies that must be synergized together in cross-cultural complexity to provide the greatest utility. It is equally important that learning programs address promoting these essential components of cross-cultural capability synergistically so that there is ample opportunity to create synergy and learning reinforcement within an across the major emphases of language, region and culture.[199]

To be an effective ethnographer, as this study has advanced, building a deep cross-cultural capability is critical, and one that builds on the kind of linked braided language, region and culture advanced for SOF. Think of this overall primary and advanced development as building a car.

Culture-general: The Chassis

The first stage includes a strong foundational sense of common cultural universals that reflect and are expressed by similar patterns of behavior, such as kinship/family, exchange, governance, and gender. This is referred to as culture-general. Gaining this knowledge set is like putting together the chassis of the car: it gives one a lattice to start to frame up cultural understanding. Yet, even more foundational to the metal and steel that frame up the chassis are the screws and bolts and other connective material that hold and gird up and give form to the chassis and the different "patterns" identified as the chassis is put together, such as the steering system, the doors, the wheels, the transmission, and others. These elements are the core beliefs and patterns that motivate behavior that can be seen in these universal systems. At this level of development, the chassis can accept most any style of car, within reason. It in effect is transferable across style. This knowledge set is mostly deficient, or done superficially, in LREC learning programs across the DOD. For SOF, a truly expeditionary force, the LREC learning program does not include and develop culture-general skills to any level of competence.

Culture Specific: The Model & Make

Usually, the type of culture learning provided in a language program is information (knowledge) that is specific to a language-speaking group or culture-group, or relates directly to a national identity. Providing this narrow slice of information, or the model and make of a car, without a good understanding of culture-general, or the chassis, can do more harm than good in preparing for cross-cultural complexity. The complexity reflects the dynamic and ever-changing social and cultural landscape that revolves more on culture groups that are driven by identity markers and the potential of more than one language, which describes many of the regions and areas into which SOF deploy. Providing culture-specific information on elements such as kinship or exchange does little to explain how and why that system may work in certain circumstances or how behavior within

the cultural expression can change. Perhaps more importantly, culture as a system is holistic and integrated across cultural expressions. In other words, to grasp any feature of culture one must also consider how features interact and influence others' expressions and their behaviors while also drawing information about how those elements work as a unit. For example, when considering the effect of the different cultural components across the breadth of behaviors, religion in Iraq was important as an identity marker but also was actively involved in influencing kinship and family, exchange, gender, governance and more. Culture-specific carries greater utility when added to an existing understanding of how systems operate universally. Dependence on culture-specific in LREC programs, such as typical SOF programs, also carries with it (besides a stunted utility in preparing for missions) reliance on language instructors who act as culture experts; many of the instructors' lack understanding of culture-general, and have limited exposure to a location or region across time and space.

Cross-Cultural Competence: Automobile Computer

As introduced in this monograph, there are four essential bias-mitigating, skill-based competencies important for operating in cross-cultural complexity. Together they provide critical enablers to successfully engage in a qualitative approach: cultural learning (expressed through culture-general and specific), cultural self-awareness, perspective-taking, and observation. 3C is not a standalone course in SOF LREC; rather, it must be interwoven in language and culture curriculum to have the most learning potential. There have been preliminary efforts in this direction, but unfortunately most of the work in 3C in a military context has been spent on developing behavioral tests and assessment measures and has not included resources to promote effective learning content.

4C features a general and specific approach as it relates to nonverbal communication channels and expression. Understanding how messages travel along such communicative paths such as kinesics (body language), proxemics (spatial messages), and others, is essential in relationship building, but also in grasping meaning from non-linguistic communication. As in culture-general, understanding how cross-cultural communication works is important before applying a cross-cultural communication-specific frame

of understanding. Of all elements of cross-cultural capability, 4C is the least understood and covered in LREC learning programs.

Language

Language has always been the long pole in the tent for preparing SOF for overseas assignments. It remains the driver in LREC training and is the reason language learning receives learning space in training and readiness, budget, and attention. Of course, language is an important enabler to all facets of methods and analysis in a qualitative approach. However, the level of language proficiency now expected from existing SOF LREC learning is inadequate to assist in any meaningful way other than promoting initial relationship building and preliminary collection efforts. It is not out of the question that at least some elements of method can be accomplished by interpretation/translation, especially if there is a time constraint attached to a specific project. However, it must also be recognized that English is a lingua franca, a bridge language "used as a means of communication between populations speaking vernaculars that are not mutually intelligible"[200] and the most widely-spoken lingua franca in history.[201] Many of the areas where SOF deploy will have culture-groups who have some English-speaking capability. Establishing gatekeepers to help identify core beliefs and build cultural realities early on and throughout fieldwork usually takes the ability to speak the same language. Having English as a common lingua franca (ELF) does not negate the linguistic and cultural variability in meaning and expression which stems from distinct social and cultural backgrounds. In addition, there is evidence that supports the real time development of linguistic and cultural forms, practices and reference frames that develop in actual social and cultural interactions,

> not as a priori defined categories, but as adaptive and emergent resources which are negotiated and context dependent. Therefore, ELF needs to move beyond the traditionally conceived target language—target culture relationship to incorporate an awareness of dynamic hybrid cultures and the skills to successfully negotiate them.[202]

Language familiarity offers benefits to a qualitative approach, but perhaps a communicative familiarity is more important, and this can be expressed in

different ways. Currently, SOF language proficiency goals attained through the Q-Course is 1+ on the Oral Proficiency Interview (OPI). There is much discussion concerning language testing in the DOD and in SOF, the kind of test employed, Defense Language Proficiency Test (DLPT) versus OPI, the use of a standardized test developed for modalities not utilized by SOF in the field, the accuracy of an oral interview and the generalizability to performance, and the reflection of test content to what SOF will be exposed to in the field.[203] Extended stays in the "field," or, in the case of SOF, supporting missions and operations obviously promotes greater language acquisition, or on the flipside, a need to collect and analyze social and cultural data will force an increased use of the language. What is certain is that linguistically and/or culturally relevant communication methods are critical for success in qualitative methodology.

However, beyond a set of knowledge and skill-based competencies, the Malinowski Model also reflects an attitude of persistence and patience, a drive to learn about others and an "operational' ethic that articulates with mission objectives and goals. As it pertains to ethics, always a sticky wicket, SOF, more than other DOD populations, must approach interactions with local groups to understand their cultural reality and identify appropriate behaviors to not just forecast future behaviors, but use those interactions to gain and build influence. In this case, ethics becomes a way to guide interactions along a path that can include future cooperation, and the goal of influence. The example of Nawa offers a model of how relationships developed and were sustained by these overarching goals.

Qualitative Approach and Methods

Thus far, this chapter has provided a brief overview of cross-cultural capability that, to some extent, exists within current SOF LREC learning efforts; obviously, some elements are more represented and integrated than others. A learning program in qualitative methods would depend on additions to or an entirely new curriculum on some aspects of theory and a more detailed review of qualitative collection and analysis methods. Regarding an applied methods program in higher education, social science departments usually have a theory course designed to explore past and contemporary theories of social and cultural behavior and a methods course (or two) on qualitative methods. The methods of training and education may involve survey and

questionnaire development, focus groups and interviewing, and an intro-duction to thematic analysis. An additional course or element of instruction would include curriculum on ethnographic methods.

There are singular courses in aspects of cross-cultural capability across the DOD. One of the authors (Sands) designed and developed the first cul-ture-general course for the United States Air Force and the Community College of the Air Force (CCAF), a variation continues at the time of this publication. An additional course on cross-cultural communications is also offered through CCAF. JSOU currently offers an undergraduate variant of this course (which includes a 2–3-hour module on ethnographic field meth-ods) and the Marines offer an online learning program, Region, Culture and Language Familiarization Course (RCLF) that also features lessons on culture and region general and specific knowledge. There may be other dedi-cated learning efforts, unknown to the authors in the DOD, that advance aspects of cross-cultural capability, but what more likely is available are elements of cross-cultural capability that are offered as part of larger curricu-lum in PME courses. How well-designed, accurate and effective these efforts are, in part, based on the expertise in theory, application and instructional design expertise engaged in development and delivery would be a useful research project.

A soon to be available primer on culture-general offers professional mili-tary personnel, including educators and trainers a lesson on the concepts of "culture" the authors believe are critical to mission success. Authors Fosher and Mackenzie in *Culture General Guidebook for Military Professionals* write:

> We have written this guidebook for you, the military professional, to deepen your understanding of this area. In it we capture and attempt to make accessible what contemporary social science says about culture, the experiences of our military colleagues, some of our own experiences, and those of civilian colleagues. As much as possible, we have written this guidebook so that you can look at sections independently of one another rather than needing to move linearly from beginning to end.[204]

Sands has developed a distance learning course, complete with an array of media and case studies that reflects a culture-general approach and is avail-able as professional education or for credit college credit, "Operationalizing Culture: Thinking Differently about Behavior in the Human Domain."[205]

The course has reached different populations within the DOD, and similar to *Culture General Guidebook for Military Professionals*, offers universal elements of "culture" to consider in all facets of military operations.

Developing an effective learning program that advances the level and depth of learning necessary for Malinowski Model, or other qualitative approaches depends on intentional design and opportunity. Carving out the space and time in a learning program as well as engaging appropriate expertise is critical. Given the time allowed or available for all LREC learning in the Qualifying School and sustainment opportunities, providing a full curriculum on theory and methods would be difficult to engineer, unless the benefit of this learning could be shown to increase mission effectiveness. Developing a pilot learning program, complete with learning objectivities, content and some initial efforts at assessment, could be advanced and then offered through JSOU, the U.S. Army John F. Kennedy Special Warfare Center and School or other such SOF schoolhouses to "test" the viability of a pilot. Topics of the course could include observation techniques, interviewing, field notes, thematic analysis and a practicum.

Currently, Army SOF features 28 weeks of LREC learning in their Q-Course (24 weeks are language centric with some instruction on culture folded in and four weeks are devoted to regional expertise). An innovative LREC learning program was advanced for SOF featuring a centralizing learning management system, a multi-disciplinary cadre and a blended residential/distance learning delivery. Evidence suggests that language proficiency increases with a more diverse and equally represented LREC curriculum. Redesigning the current LREC curriculum could create space to include inserting learning objectives and content that advance methods. The remaining SOF services, services—the SEALs, the United States Marine Corps Forces Special Operations Command, and the Air Force Special Operations Command—feature a similar language-centric approach, although the LREC component of Army special operations forces' Q-school is the longest in terms of duration and objectives. Elements of cross-cultural capability are considered to varying degrees and levels across SOF, although curriculum and instructional effort for non-language elements are minimal. Instructional delivery is primarily residential and there is little effort to create the linkages of knowledge and skills across components of cross-cultural capability.

A qualitative theory and methods learning program could become part of the LREC model advanced by Sands with some reorganization and extension of course in terms of duration. Sands' SOF LREC model has shown increased learning in language proficiency when cross-cultural components are braided, while having the added benefit of introducing critical culture-general and specific knowledge and cross-cultural competence and cross-cultural communication skills. The extended LREC course would seed an introduction to theory and methods and then offer potential follow-on development of skills through a blended approach of distance learning/self-paced and guided mentoring. A follow-on language sustainment program currently exists in SOF and offers learning space and a learning platform that could be utilized for advancing a qualitative approach.

One of the primary points of this monograph is that current and future national defense and security missions should involve a much deeper understanding of how culture as a system works and how best that understanding can be utilized through a qualitative approach to further mission success. Currently, the DOD lacks expertise in terms of human resources with theoretically-informed knowledge and skills and methods; HTS was an attempt to close this gap, but in the end, was untenable. Training a Ph.D. who can win bar fights currently may not be an option (but SOF could consider pilot programs to offer advanced learning in culture and qualitative approaches to mid-career senior enlisted to organically seed some of this capability now). One of the authors is adjunct faculty at Norwich University's online degree program, Strategic Studies and Defense Analysis, focused on providing opportunity to SOF senior enlisted to get their bachelor's degree. A partnership with higher education could be designed to build in capability and provide a four-year or advanced degree. What is suggested is that SOF need to consider best how to conceptualize an approach that encompasses the intent of this monograph. If leveraging the private sector is not viable, then the best of all possible worlds is to begin to develop that capability organically.

Chapter 8. Conclusion

I'm an inveterate fox and not a hedgehog, so I always think you should try everything.[206]

This monograph presented a case for infusing a qualitative approach and related research methods and offered a concept of applied SOF ethnography to improve the ability of SOF to navigate the future operating environment. Malinowski, one of the first anthropologists and ethnographers, modeled an approach and method for SOF to consider.

SOF, with frequent and extended deployments in local environments, must serve many different mission functions. One of these functions is as on-the-ground collector of relevant data (e.g., social and cultural data). Another function is on-the-ground analyst of such data to better inform future goals and strategies, while also being able to distill their analysis for better intelligence needed "up the chain." SOF must consider the effects of cognitive biases inherent in collection, analysis, and prediction as their operations, and behaviors, impact directly with those from local areas and groups in social and cultural interactions. But more importantly, SOF should consider the effects of cultural bias on all facets of their mission.

SOF must consider the effects of cognitive biases inherent in collection, analysis, and prediction as their operations, and behaviors, impact directly with those from local areas and groups in social and cultural interactions.

A model for revealing a population's TOM was advanced in this monograph based on Bronislaw Malinowski's approach and methods utilized in his fieldwork in the Trobriand Islands. The model consists of three aspects: (a) the methods utilized in ethnography; (b) the attitude of the participant-observer that promotes a cognitive approach to cross-cultural competence, and (c) a process of ongoing hypothesis testing through cross-cultural communication to determine validity, reliability and authenticity of the perceived social and cultural reality. To explore this model in depth, a number of concepts were considered.

"Thinking differently" was introduced as an option to manage the profound intended and unintended consequences of cultural bias on cognition, and therefore for SOF, the need to mitigate, or at least manage, the effect of cultural and social biases. Thinking differently features the development of skill-based, cross-cultural competencies that enable the management of cultural biases. 3C is a key enabler of cross-cultural capability and is foundational to a successful qualitative approach. SOF currently, as most DOD populations, do not contain curriculum or assessment in 3C in their LREC learning program.

How culture as a concept is appropriated and applied by SOF influences an array of needs, to include development of policy and strategy, mission-focus, and learning efforts. The fidelity of that concept and how it is operationalized today plays heavily in explaining the nature of local social interactions, identity markers, and the meaning of social and cultural knowledge and behaviors, among other critical areas that can affect mission and operations. Cultural knowledge is represented, and in many cases actualized, in social interactions and relationships and is heavily dependent on context and having a solid understanding of the cultural realities that comprise the local populations. Rich points were advanced to identify intersections where meaning between individuals or between groups do not align. Formulating cultural reality is dependent on explicating core beliefs of a people. Core beliefs were identified as ideas held to be true and natural and endemic to a culture group. These beliefs are a repository of influential cultural knowledge that consider foundational truths such as right and wrong, what is life, causal agency, good health, and many other basal and influential notions that frame and motivate individual and group behavior. Core beliefs frame up cultural reality and can be discovered through narrative, stories and everyday social interactions and aid in promoting a deeper and more useful understanding of meaning and behavior.

A qualitative approach was cast as a process of discovery to investigate, collect, analyze and interpret observations (and participation) of socially and culturally-derived phenomena, including words, texts, narratives, and behavior to identify patterns of behavior (relationships) and make sense of the meaning of that behavior. Qualitative research methods are used to access cultural knowledge that can be observed through actions and is generated in interpersonal interactions and relationships. The validity and reliability of such data, different from that associated with quantitative analysis, offers

a means to authenticate interpretations of perspectives and thus a generalizability of results beyond data sources.

Ethnography, one such method, promotes in-depth and extended "fieldwork" to access core beliefs and build cultural realities. Just so stories, cultural narratives, are one way of explicating core beliefs. In the process, meaningful patterns of behavior can be identified and made useful to understanding and the locating social and cultural channels to advance mission goals and objectives. Implications of the duality of an emic/etic perspective (insider/outsider) was explored and managing this divide can assist in moving from a locally-specific set of core beliefs and cultural reality to an understanding that can be generalized across culture groups. Applied ethnography was offered as an approach and set of methods that offers the most utility to SOF. Participant-observation, Rapid Assessment Process, and Participatory Ethnography were described as methods most useful to SOF. Two examples from OIF and OEF, PRTs and a specific multi-month mission in southern Afghanistan of how elements of applied ethnography were employed to the benefit of mission. The last chapter offered some suggestions on how a qualitative-approach and method could be folded into the SOF LRC learning program.

There has been a plethora of recent publications and op-eds that have indicated that the gray zone requires a radical departure from traditional military planning and operations. This realization is a starting point, but so far, actual approaches and programs either are not offered or do not consider a critical social or cultural science endeavor that can pay dividends to mission success. It must also be stressed that building in a capability like this cannot be switched on and made to produce results immediately; this apparent approach by DOD to meet it by a variety of means, academics, learning technology, civilians on the battlefield, etc. has stunted institutional efforts to develop a more robust LRC learning program that would be critical for the approach and methods offered in this monograph. In the end, there is no shortcut to knowing, learning, and applying culture; the last decade, time and time again, has shown this to be the case.♟

Acronyms

BPC	building partner capacity
CA	civil affairs
CCAF	Community College of the Air Force
COIN	counterinsurgency
3C	Cross-Cultural Competencies
4C	Cross-Cultural Communication Competence
DA	direct action
DLPT	Defense Language Proficiency Test
DOD	Department of Defense
ELF	English as a Lingua Franca
FAO	foreign area officer
FG	focus groups
FID	foreign internal defense
HA	humanitarian assistance
HD	Human Domain
HT	Human Terrain
HTS	Human Terrain System
I&W	indications and warnings
IW	irregular warfare
JC-HAMO	Joint Concept for Human Aspects of Military Operations
KL	key leaders
LRA	Lord's Resistance Army

LREC	Language, Regional Expertise, and Culture
MISO	Military Information Support Operations
NGO	nongovernmental organization
OEF	Operation Enduring Freedom
OIF	Operation Iraqi Freedom
OPI	Oral Proficiency Interview
PAR	Participatory Action Research
PM	Participatory Mapping
PO	Participant-Observation
PR	Participatory Research
PRT	Provincial Reconstruction Teams
RAP	Rapid Assessment Procedure
RCLF	Region, Culture and Language Familiarization Course
RPF	Rwanda Patriotic Front
SF	special forces
SOF	Special Operations Forces
TOM	Theory of Mind
USAID	United States Agency for International Development
USDA	Department of Agriculture
U.S. SOF	United States Special Operations Forces
VSO	Village Stability Operations

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