



GAYS IN FOREIGN MILITARIES 2010: A GLOBAL PRIMER

February 2010

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Executive Summary

1. Twenty-five nations now allow gays and lesbians to serve openly in the military.
2. In many of those countries, debate before the policy changes was highly pitched and many people both inside and outside the military predicted major disruptions. In Britain and Canada, roughly two thirds of military respondents in polls said they would refuse to serve with open gays, but when inclusive policies were implemented, no more than three people in each country actually resigned.
3. Research has uniformly shown that transitions to policies of equal treatment without regard to sexual orientation have been highly successful and have had no negative impact on morale, recruitment, retention, readiness or overall combat effectiveness. No consulted expert anywhere in the world concluded that lifting the ban on openly gay service caused an overall decline in the military.
4. The updated research conducted for this study confirm that early assessments by both military and independent analysts hold across time: none of the successes and gains of transitions to full inclusion were reversed by any of the nations studied, or yielded delayed problems over the years in which these militaries allowed openly gay service.
5. Evidence suggests that lifting bans on openly gay service contributed to improving the command climate in foreign militaries, including increased focus on behavior and mission rather than identity and difference, greater respect for

rules and policies that reflect the modern military, a decrease in harassment, retention of critical personnel, and enhanced respect for privacy.

6. All the countries studied completed their implementations of repeal either immediately or within four months of the government's decision to end discrimination. These experiences confirm research findings which show that a quick, simple implementation process is instrumental in ensuring success. Swift, decisive implementation signals the support of top leadership and confidence that the process will go smoothly, while a "phased-in" implementation can create anxiety, confusion, and obstructionism.
7. Two main factors contributed to the success of transitions to openly gay service: clear signals of leadership support and a focus on a uniform code of behavior without regard to sexual orientation. Also key are simple training guidelines that communicate the support of leadership, that explain the uniform standards for conduct, and that avoid "sensitivity" training, which can backfire by causing resentment in the ranks.
8. None of the countries studied installed separate facilities for gay troops, nor did they retain rules treating gays differently from heterosexuals. Each country has taken its own approach to resolving questions of benefits, housing, partner recognition, and re-instatement. Generally, the military honors the status afforded to gay or lesbian couples by that country, and the military rarely gets out in front of the government or other institutions in the benefits offered.

9. Lifting bans on openly gay service in foreign countries did not result in a mass “coming out.” Yet gay and lesbian troops serve in all levels of the armed forces of Britain, Canada, Australia, South Africa, and Israel, in both combat and non-combat positions, at both the enlisted level and as high commanders.
10. There were no instances of increased harassment of or by gay people as a result of lifting bans in any of the countries studied.
11. Informal discrimination in treatment and promotions have not been wiped out, but evidence suggests that formal policies of equal treatment for people equally situated helps reduce discrimination and resentment, and helps keep the focus on behavior necessary to complete the mission rather than on group traits that can distract from the mission.
12. The U.S. military has a long tradition of considering the experiences of other militaries to be relevant to its own lessons learned. While there is no doubt that the U.S. military is different from other militaries, such distinctions have not prevented the U.S. military from comparing itself to and learning from foreign armed forces. Using resources like the Foreign Military Studies Office, the U.S. military itself has commissioned research on matters of personnel, health policy, housing, weapons innovation, technology, counterterrorism, and the question of gay service.

Introduction

I. OVERVIEW

On February 2, 2010, Secretary of Defense Robert Gates and Chairman of the Joint Chiefs of Staff Adm. Mike Mullen told a senate hearing that they support President Barack Obama's plan to end the country's "don't ask, don't tell" policy on gays in the military. "To ensure the Department is prepared" for the ban's end, Secretary Gates announced an eleven-month study period and a military working group that would "thoroughly, objectively, and methodically examine all aspects" of the question of openly gay service "and produce its finding and recommendation in the form of an implementation plan" by the end of 2010. In response to questions from Sen. Susan Collins of Maine, Adm. Mullen said he had spoken to his counterparts in countries that lifted the bans and they told him there had been "no impact on military effectiveness" as a result, and that he was aware of no studies showing that ending "don't ask, don't tell" would harm unit cohesion. Both Adm. Mullen and Sec. Gates, however, called for more study, with the Chairman saying "there's been no thorough or comprehensive work done with respect to that aspect since 1993" and the Secretary saying we need to "address a number of assertions that have been made for which we have no basis in fact."¹

This study seeks to answer some of the questions that have been, and will continue to be, raised surrounding the instructive lessons from other nations that have lifted their bans on openly gay service. The Palm Center has identified at least twenty-five such countries,

including Britain, Canada, Israel, Australia, and South Africa, which constitute the focus of this report. After summarizing the history of research on gay service in foreign militaries, this study chronicles the specific histories of the policy changes in those five countries. It then returns to in-depth analyses of the empirical results of the policy transitions, with an overview of research results; a brief section detailing how the new policies were implemented; and then individual case-studies organized by country. A final section discusses the relevance of the lessons learned from foreign militaries, addressing the limits and applicability of those lessons to the current situation in the U.S.

II. HISTORY

In the fall of 1992, Canada and Australia lifted their bans on gay service members, and in 1993 Israel followed suit. In 1998, South Africa lifted its ban on gay troops as part of its wholesale reorganization following the fall of Apartheid. And in 2000, Great Britain, the staunchest ally of the U.S., ended its gay ban. Presently 25 nations allow open gays to serve in their militaries, including all the original NATO countries besides Turkey and the U.S. Since 1992, Americans have debated the prospect of lifting their gay ban. President Bill Clinton promised to do so when he entered the White House that fall, but in 1993, he agreed to a compromise when resistance from military, political, and religious opponents began to derail his efforts. The result, a Pentagon policy and federal statute collectively known as “don’t ask, don’t tell,” calls for the separation of service members

who are revealed to be gay or who engage in “homosexual acts” while prohibiting the military from asking recruits outright if they are gay, lesbian, or bisexual.

Under the current policy, which was implemented in 1994, over 13,000 service members have been discharged. Republicans have generally opposed lifting the current ban on openly gay service, with party leaders saying the current policy is working. But President Barack Obama, like President Clinton, has promised to lift the ban, and Democrat leaders in Congress have agreed to support the President’s efforts. The political leadership, however, has not set a timetable and has not yet moved to halt the discharges either by Presidential order or by legislative repeal, instead simply reiterating its commitment to do so eventually.

Both advocates and proponents of lifting the American ban on openly gay service have said they want to study the experiences of other militaries to inform the debate in the U.S. Over the past twenty years, numerous studies of foreign militaries have been conducted, including studies by the Government Accountability Office, the U.S. Army Research Institute for the Behavioral and Social Sciences, the Rand Corporation, the Palm Center at the University of California, Santa Barbara, and the Defence Ministries of Britain and other nations that transitioned to a policy of full inclusion. The results of each of these studies showed that openly gay service does not undermine unit cohesion, recruitment, retention, morale, or overall combat effectiveness. Until now, however, these results have not been compiled in a single volume or updated to reflect the latest information on the effects of lifting gay bans in the armed forces.

This study brings together the results of all the major research on gays in foreign militaries and updates that research to the present, focusing on the experiences of Britain, Canada, and other English-speaking nations with relatively similar cultures to that of the U.S. The study begins with the historical background of policies on gays in several armed forces. It then discusses the results of research on the impact of lifting gay bans in these nations, with in-depth focus on American allies such as Britain and Canada. Finally, a section on the relevance to the U.S. of foreign militaries offers a detailed explanation of the value and limitations of generalizing from foreign experiences when assessing the prospects for a successful transition in the U.S. The appendix summarizes relevant policies in other nations and includes a list of lessons learned from studying these experiences.

Background

I. BRITAIN

Like the U.S., Britain banned service by gays throughout the 20th century, just as its civilian laws initially criminalized sexual relations between men (laws did not address female same-sex relationships). Depending on the service branch, the military dealt with homosexuals either by banning them outright or by charging them with “disgraceful conduct of an indecent kind,” “conduct prejudicial to good order or discipline” or “scandalous conduct by officers.”²

Reflecting the similarities of American and British culture, the same rationales were invoked to justify the exclusion rules in Britain as in the U.S. The British Ministry of Defence argued that “Homosexual behavior can cause offence, polarize relationships, induce ill-discipline, and as a consequence damage morale and unit effectiveness.” One retired general told the BBC that letting gays serve meant “striking at the root of discipline and morale” since service members had to “live hugger-mugger at most times” and that “the great majority do not want to be brought into contact with homosexual practices.”³ Another retired officer who commanded U.N. forces in Bosnia recalled that when he had two gay soldiers in his battalion, he “had extreme difficulty in controlling the remainder of the soldiers because they fundamentally wanted to lynch them.”⁴

As in the U.S., the language of homosexual exclusion arguments spoke of “sexual deviancy” and “feminine gestures,” and of mental illness and sexually transmitted diseases. The same distinctions between identity and behavior were also made in both nations: in Britain, the rules specified that the admission of homosexuality was grounds for dismissal even if no behavior was involved. And as in the U.S., the history of gays in the British military is replete with surveillance, informants, blackmail, stakeouts, investigations and psychological exams.⁵

By the time the British High Court heard a major challenge to the gay ban in 1995, most of the above rationales had been discredited and abandoned. Although the Court rebuffed the service members’ challenge and allowed the military to continue its ban, the Ministry of Defence created the Homosexual Policy Assessment Team to evaluate its policy. The move was a response to a warning by the Court that, despite its current ruling in favor of the military, the gay ban was unlikely to survive a direct challenge in the European Convention on Human Rights which, unlike the British Court, had the authority to force the military’s hand.

The assessment team consulted the experiences of other countries, including Canada, Australia and Israel, which had lifted their bans a few years earlier. In their visits, they were repeatedly told by officials that gay service had not undermined military performance. In response, British researchers acknowledged that the ban could be lifted, but that such a change was unlikely not because of a military rationale, but because of political resistance.⁶

The team ultimately recommended that the military retain its ban. Its report made clear that there was no evidence that gays were unsuited to military service and that the assumption that gays were a threat to security and a predatory menace to young troops were unfounded. Rather, the problem was that straight soldiers were uncomfortable around gays, and openly gay service could therefore undermine cohesion and threaten recruitment. Lifting the ban, said the report, “would be an affront to service people” and lead to “heterosexual resentment and hostility.” Reform at the urging of civilian society would be viewed by military members as “coercive interference in their way of life.” As in the American debate, the moral opposition of straights was tied to military needs, prompting senior leaders to argue that military effectiveness justified gay exclusion.⁷

The military did, however, order a relaxation of enforcement of the ban, mindful of the changes in society taking shape throughout the 1990s, and bracing for a heftier challenge in the European Court of Human Rights, which threatened to cost the government billions in wrongful dismissal claims. Military leaders told commanders only to investigate suspected homosexuals if an unavoidable problem arose. For gays, the change was minimal: they continued to lose their jobs, receive unequal treatment and operate in a climate of discrimination, fear and uncertainty.

On September 27, 1999, the European Court of Human Rights issued its ruling that the British Defence Ministry had violated the European Convention’s guarantee of an “equal respect” to “private and family life”⁸ and that the policy and the investigations it

prompted were “exceptionally intrusive.”⁹ The Court rejected the military’s claim that the unique circumstances of life in the armed forces justified anti-gay discrimination and ruled that heterosexual bias against gays was no more compelling a reason to ban them than would be animus against groups with a different race or ethnic or national origin. It also dismissed the military’s contention that gay service would endanger morale, saying the foundation of such arguments in opinion polls made them unconvincing.

The Ministry of Defence immediately announced that it accepted the ruling and it ordered a halt to all discharges while it studied how to abide by the court’s decision.¹⁰ It quickly established a policy of zero-tolerance of discrimination on the basis of sexual orientation and drew up a Code of Social Conduct to govern all sexual behavior among personnel, regardless of gender, sexual orientation, rank, or status. This code of behavior, which still informs current policy, applies to heterosexuals and homosexuals alike. It aims to ensure that sexual relations of any kind do not adversely affect operational effectiveness.¹¹

The Chief of Defence Staff General, despite expecting some tough scenarios for commanding officers, expressed confidence in the military’s ability to make the changes, saying that “times have changed” since the gay ban was first formulated. “I don’t believe that the operational efficiency of the Services will be affected,” he said, “although I’m not saying we won’t have some difficult incidents.” Ultimately, he concluded, “We think we can make it work.”¹²

In trying to figure out how to “make it work,” the British military considered America’s

“don’t ask, don’t tell” policy. What they found was that it was a “disaster,” which “hadn’t worked,” was “unworkable” and was “hypocritical.”¹³ Instead, the British military opted for full repeal and based its new regulations on the Australian model, which simply banned public displays of affection, harassment and inappropriate relationships. The Ministry of Defence formally lifted its gay ban on January 12, 2000, within four months of the September court ruling, and invited ousted troops to reapply for service.

II. CANADA

Until 1988, the Canadian Forces had in place an outright ban on gays and lesbians in uniform: they were barred from service and anyone who believed a peer was gay was required to report the suspicion to a superior. The Canadian ban was relaxed in 1988, as pressure mounted to bring the policy in line with the 1978 Canadian Human Rights Act and the 1985 Canadian Charter of Rights and Freedoms. The important policy shift dictated that the CF would not knowingly enroll homosexuals but would allow gays who did serve to stay in uniform, albeit with no opportunities for advancement. Generally, enforcement of the restrictions against known gays and lesbians was loosened during this period, but unequal treatment of heterosexual and gay troops remained: known gays and lesbians were routinely denied promotions, security clearances and awards. The Department of National Defence continued to argue that a formal ban was necessary to

protect “cohesion and morale, discipline, leadership, recruiting, medical fitness, and the rights to privacy of other members.”¹⁴

Yet momentum was growing in favor of change. Inspired by other court decisions, five service members sued the Canadian Forces and won an initial ruling that the gay ban violated the Charter of Rights and Freedoms. Ultimately, the Canadian military agreed to settle its case in 1992, acknowledging that it was unlikely to win the case on its merits.

Key to the CF’s internal research was a 1986 survey of active-duty CF troops that was interpreted to indicate that heterosexual male members were strongly opposed to the removal of the ban and that the presence of homosexuals could lead to a serious decrease in operational effectiveness.¹⁵ Countering this perspective were several reviews of policies, the outcomes of legal proceedings, and internal assessments of the defensibility of the 1988 interim policy. These reviews culminated in the conclusion by the CF that it could not successfully appeal the finding of the suit by former CF member Michelle Douglas, which in turn resulted in the 1992 decision to repeal the exclusionary 1988 policy rather than continue legal proceedings to justify its retention.

It is sometimes thought that reform in Canada went over without much resistance. In actuality, opposition was intense. Surveys showed that majorities of those in the military would not share sleeping and bathing quarters with known gays, and many said they would refuse to work with gays or accept a gay supervisor. A military task force was formed during the debate, which recommended that gay exclusion remain, on the grounds

that “the effect of the presence of homosexuals would [lead to] a serious decrease in operational effectiveness.” Even when the military determined it would lose its case in court, the government delayed the change because of vociferous opposition by conservatives in Parliament. The similarities to opposition in the U.S. were striking.¹⁶

III. AUSTRALIA

The Australian Defence Forces did not see quite the same fight as did Canada, but there was certainly resistance to equal treatment. The military only formalized its ban on gay troops in 1986. Before that, commanders were given wide discretion to decide when to boot gays, and leaders were able to rely on civilian laws against sodomy and homosexual relations to root them out. Ironically, it was at the very moment when the rest of society was liberalizing its limitations on homosexual behavior that the Australian military tightened its own regulations on gay troops. State and federal laws banning sodomy fell during this decade, as the country brought its laws into conformity with new international human rights accords. Unable to continue to draw on civilian laws against homosexual behavior, the ADF banned homosexual service outright in 1986.¹⁷

The short-lived Australian gay ban was always weaker than the policies in many of its ally nations. While there were reports of witch hunts and unequal treatment, the policy was often enforced unevenly and the tolerance and inconsistent enforcement extended to commanders throughout the services, who were often aware of gays and lesbians under

their command and took no steps to kick them out. In the years leading up to the ban's formal end, the ADF had been pressed to respond to several cultural trends toward liberalization and to specific complaints that the military was not doing enough to recruit, retain and respect women and racial and ethnic minorities. Such criticism could not be ignored, as the armed forces were finding it difficult to fill their ranks with capable service members.¹⁸

It was in this context—one that highlighted the needs of the military as much as the social and cultural pressures for greater tolerance—that the Australian military began to consider formally ending its restrictions on gays and lesbians. Legal considerations also held sway: in 1980, the Commonwealth had adopted the International Covenant on Civil and Political Rights. While homosexuality was not explicitly mentioned in the covenant, political leaders interpreted the agreement to mean discrimination on the basis of sexual orientation should be banned. For instance, when a lesbian soldier complained to the Australian Human Rights and Equal Opportunities Commission that her sexual orientation was the partial basis of her discharge, the ADA agreed to review its policy.

While the military chose to retain its formal ban at that time, political pressure was mounting and the government created a study group to look into the policy and make a formal recommendation. During the study period, those who opposed gay service made the familiar arguments: the presence of known gays and lesbians would compromise effectiveness by impairing cohesion and driving down morale. Nevertheless, the study group recommended in 1992 that the gay ban be replaced with a policy of

nondiscrimination, and the liberal government of Prime Minister Paul Keating, helped by the health minister's argument that keeping homosexuality a secret exacerbated efforts to fight AIDS, ordered the new policy implemented immediately.¹⁹

As was the case elsewhere, the changes were vehemently opposed. The Defence Minister and the Service Chiefs strongly opposed lifting the ban, with a Defence spokesman saying, "The real issue in this debate is not civil liberties, but rather the legitimate concerns of the service chiefs about the need to maintain unit cohesion and discipline in the forces." A representative of the Armed Forces Federation said that 98% of the troops would be "disappointed" with the lifting of the ban, and that they were not anti-gay but simply "not comfortable with the situation." The major veterans' group in Australia insisted that tolerating known gays would undermine cohesion and break the bonds of trust that were essential to an effective military. Some claimed that the presence of gays would increase the spread of HIV through battlefield blood transfers, even though health officials say the best way to fight this prospect is to be able to identify those with AIDS rather than require them to remain in the closet.²⁰

IV. SOUTH AFRICA

During the apartheid era, the South African military maintained a dual policy on homosexuality. Fully prohibited among members of the permanent force, homosexuality was officially tolerated among the conscript force to prevent malingering. But official

toleration was accompanied by aversion shock therapy, chemical castration, and other human rights abuses against gay and lesbian personnel which have only recently come to light in the new South Africa. When the apartheid regime fell in 1994, the new democratic government committed itself to addressing human rights considerations, including the status of gays and lesbians. After the South African Constitution adopted a provision of non-discrimination on the basis of sexual orientation in 1996, the South African military followed suit. In 1998, the South African National Defence Force (SANDF) implemented an Equal Opportunity and Affirmative Action policy that formally declared that there would no longer be discrimination against gays and lesbians in the armed services and that the military was officially uninterested in the sexual orientation of any of its service members, gay or straight.

The groundwork for the inclusion of a gay rights provision in the Constitution had been laid in 1992, when gay activists persuaded the (then exiled) African National Congress (ANC) to adopt a policy on sexual orientation.²¹ The Democratic Party and the Inkatha Freedom party—other major players in South African politics—similarly each took a pro gay rights stance.²² As a result of this political support, sexual orientation was included in the draft Constitution when the ANC first came to power in 1994.

During this process of constitutional review, the National Party objected to specific mention of sexual orientation in the document.²³ The gay rights provision was opposed most strongly by the African Christian Democratic Party, which argued that homosexuality was anti-family, anti-Christian, and anti-African.²⁴ In 1996, over the

objection of conservatives, the new Constitution was adopted with an equality provision which read that “the state may not unfairly discriminate against anyone on one or more grounds, including race, gender, sex, pregnancy, marital status, ethnic or social origin, colour, *sexual orientation*, age, disability, religion, conscience, belief, culture, language, and birth . . .”²⁵ Since the adoption of the Constitution, both state and non-state actors have worked to bring various state policies and laws into line with the Constitution; the South African government has committed itself to “reform economic and social conditions for the majority of South Africans left wanting by the apartheid regime.”²⁶

In order to bring its governing principles fully into compliance with the new Constitution, the Ministry of Defence embarked on a defense review process in which it invited public input on all facets of its operating procedures and policies. There was one day during the review process, according to Lindy Heinecken, Deputy Director for the Center for Military Studies, South African Military Academy, “when there was very intense discussion about what the gay rights clause would mean in each and every sector of military life.”²⁷ The issue of homosexuality in the military had generated little public debate prior to the adoption of the new Constitution. For one thing, according to Graeme Reid, “the terms of the debate were so different because there was so much resistance to being in the military [generally]” during the apartheid era.²⁸ And despite some initial concerns, “the Department of Defence considered the [integration of homosexuals] as a *fait accompli*,” according to Evert Knoesen, Director of the Lesbian and Gay Equality Project (formerly the National Coalition for Lesbian and Gay Equality).²⁹ Thus, the policy change came from within the Department of Defence itself. “The DOD decided to

make its own policy,” according to SANDF Colonel Jan Kotze, “taking its cue from the stipulations of the Constitution.”³⁰

The policy on sexual orientation was included as part of the DOD’s Equal Opportunity and Affirmative Action policy, which was initially promulgated in 1998, then reviewed and readopted again in 2002.³¹ Under this policy, recruits are not questioned about their sexual orientation and the SANDF is officially unconcerned about lawful sexual behavior on the part of its members. Instead, behavior by anyone that is considered sexually atypical or immoral, and that is considered a threat to military discipline or effectiveness is subject to punishment. The policy applies to people regardless of their sexual orientation, but leaves considerable discretion in the hands of commanders.³²

V. ISRAEL

Like Australia, the state of Israel did not have a longstanding, explicit ban on homosexual service members, but used discretion to determine when commanders believed gay or lesbian troops were problematic and worthy of exclusion. For most of the country’s short history, not surprisingly, routine prejudice meant that the Israel Defense Forces dismissed known gays because leaders assumed their sexuality made them unsuitable. A 1983 regulation made clear that service members were not to be discharged simply because they were gay, but required them to undergo a mental health evaluation and banned them from top secret positions.³³

A decade later, while the U.S. was embroiled in an agonizing discussion about gay service, Israel began its own, more tempered debate. Ironically, given how the American policy would end up, Israeli officials acknowledged that President Clinton's support for gay service had been influential in driving debate in Israel, where the issue of gay rights had never been discussed at such high levels of government. The discussion was also prompted by an unusual hearing at the Knesset, the Israeli Parliament, when Uzi Even, the chairman of the Chemistry Department at Tel Aviv University, and a senior weapons development researcher, told the nation he had been stripped of his security clearance when his homosexuality was revealed. Even had supplied the government with top-notch security research for fifteen years. He was deemed a security threat even though he had just come out of the closet, thus neutralizing any possibility of blackmail.³⁴ (In 2002, Even became the first openly gay member of the Knesset, suggesting how far tolerance has grown in Israeli society in a decade.³⁵)

With the vocal support of Prime Minister Yitzhak Rabin, who stated, "I don't see any reason to discriminate against homosexuals," and the military chief of staff, Lt. Gen. Ehud Barak, a military committee was created to review the policy and make recommendations for change. With no military officials testifying against reform, the review committee recommended new regulations that officially "recognized that homosexuals are entitled to serve in the military as are others."³⁶ In response, the Israeli military banned any restrictions or differential treatment based on sexual orientation, and

ordered that decisions about placement, promotion and security clearances be based on individual aptitude and behavior without regard to orientation.

The absence of official resistance did not mean that Israel had ceased to be a homophobic culture—founded, as it was, on biblical precepts, with a government heavily influenced by religious Jews, and a society enamored of macho men. A study conducted in the 1980s found that Israelis had more negative attitudes toward homosexuals than Americans. Even in the 1990s, Israel’s organized gay rights lobby was miniscule compared to its American counterparts, thus limiting the strength of voices pressing for reform. And the military was, like in the U.S., a particularly conservative institution within the larger society. During induction, gays were referred to a psychologist for an evaluation. "Based on the assumption, correct or incorrect, that sometimes along with homosexuality come other behavioral disturbances, we conduct a more in-depth clinical interview," said Dr. Reuven Gal, who was chief psychologist for the IDF.³⁷

In the early 1990s, Ron Paran, a psychologist working with gays and lesbians in Israel, found marked homophobia in Israeli society, particularly in the military. "I think there are still a lot of people in the psychiatric profession and in the army who still see homosexuality as a problem," he said, "and this policy is their way of expressing that." Paran said Israel was a "paradox" in which the laws are "much more liberal than the general society." As in society generally, he said the military was instinctually uncomfortable with homosexuality. "I work with a lot of teachers and parents who may

cognitively understand homosexuality, but in their emotional response to it are still very backward. The army is the same way.”³⁸

Yet as a nation with compulsory service, which recognized the formative role of that service in creating a sense of citizenship, Israel determined by 1993 that it was unfair, unwise and unnecessary to bar an entire group of people from the military. Its new regulations said that “there is no limit on the induction of homosexuals to the army and their induction is according to the criteria that apply to all candidates to the army.”³⁹

Research on the Impact of Lifting Bans on Service by Gays and Lesbians in Foreign Militaries

Overview

The findings of an overwhelming critical mass of research on the experience of foreign militaries that have lifted their gay bans are that the transition had no negative impact on military effectiveness. Upon further examination, the only effects of lifting gay exclusion rules have been positive ones. Militaries in Great Britain, Australia, Canada, and Israel and S. Africa have seen increased retention of critical skills, reductions in harassment, less anxiety about sexual orientation in the ranks, greater openness in relations between gays and straights, and less restricted access to recruitment pools, as schools and universities welcomed the military back onto campus for dropping their discriminatory practices. Above all, none of the crises in recruitment, retention, resignations, morale, cohesion, readiness or “operational effectiveness” came to pass.

In 1993, the U.S. Secretary of Defense, Les Aspin, commissioned the Rand Corporation to conduct a broad study of lessons relevant to lifting the gay ban in the U.S. Rand sent a team of seventy-five multi-disciplinary social scientists from its National Defense Research Institute across the world to study the issue. Sociologists, psychologists, anthropologists, historians, economists, doctors, lawyers and national security experts

studied the scientific literature on a broad range of related topics: group cohesion, the experiences of foreign militaries, the theory and history of institutional change, public and military opinion, patterns of sexual behavior in America, sexual harassment, leadership theory, public health concerns, the history of racial integration in the military, policies on sexuality in police and fire departments, and legal considerations regarding access to military service.

The result was a 500-page study, completed in July 1993. It offered assessments of policies on gay service in Canada, Israel, and Britain, as well as Norway, the Netherlands, France, Germany, and others. At the time, Britain was the only nation of those studied to have a full ban on gay service. Of those that allowed gays to serve, Rand found that “none of the militaries studied for this report believe their effectiveness as an organization has been impaired or reduced as a result of the inclusion of homosexuals.” In Canada, where the ban had just ended, Rand found “no resignations (despite previous threats to quit), no problems with recruitment, and no diminution of cohesion, morale, or organizational effectiveness.” Rand found roughly identical results for Israel. Its researchers concluded that sexual orientation alone was “not germane” in determining who should serve. The authors stated that the ban could be lifted in the U.S. without major problems, so long as senior leaders got behind the change and clear guidelines were disseminated throughout the chain of command. They also suggested that the Uniform Code of Military Justice’s ban on consensual sodomy should be eliminated.⁴⁰

In 1992 and 1993, the GAO conducted two in-depth studies of foreign militaries. In the first study, researchers looked at 17 different countries, and eight police and fire departments in four U.S. cities, and reviewed military and non-military polls, studies, legal decisions and scholarly research on homosexual service. The GAO study noted previous studies conducted by the U.S. military, including the 1957 Crittenden Report and the 1988-89 PERSEREC studies. Incorporating these studies and its own new research, GAO recommended in an early draft that Congress “may wish to direct the Secretary of Defense to reconsider the basis” for gay exclusion. The final GAO report, however, deleted this suggestion.⁴¹

In 1993, GAO reported findings from its second study, this one an assessment of twenty-five foreign militaries. In Australia, GAO found, “Effects on unit cohesiveness have not yet been fully determined. However, early indications are that the new policy has had little or no adverse impact.” Research over time confirmed that openly gay service in Australia caused no trouble. Three years later, when Britain was considering lifting its ban, government researchers issued a report on the situation in Australia, which concluded that, despite an early outcry, homosexuality quickly became a non-issue: any challenges in integrating open gays were regarded as “just another legitimate management problem.” Research on Israel by both the GAO and the Rand Corporation found the same results.⁴²

In 1994, The U.S. Army Research Institute for the Behavioral and Social Sciences also studied the situation in Canada and concluded that anticipated damage to readiness never

materialized after the ban was lifted: “Negative consequences predicted in the areas of recruitment, employment, attrition, retention, and cohesion and morale have not occurred” since the policy was changed, the report stated.⁴³

In 2000, after Britain lifted its ban, The Palm Center at the University of California, Santa Barbara, conducted exhaustive studies to assess the effects of openly gay service in Britain, Israel, Canada and Australia. Palm researchers reviewed over 600 documents and interviewed over one hundred international experts, contacting every identifiable professional with expertise on the policy change, including military officers, government leaders, academic researchers, journalists who covered the issue, veterans and nongovernmental observers. Palm found that not one person had observed any impact or any effect at all that “undermined military performance, readiness, or cohesion, led to increased difficulties in recruiting or retention, or increased the rate of HIV infection among the troops.”⁴⁴ Those interviewed—including generals, civilian defense leaders, field commanders, and many officials who had predicted major problems if gays were permitted to serve openly—uniformly reported there had been “no impact.” Researchers repeatedly encountered the same narrative: lifting the ban was “an absolute non-event”; openly gay service was “not that big a deal for us”; open gays “do not constitute an issue [with respect to] unit cohesion” and the whole subject “is very marginal indeed as far as this military is concerned”; whether gays serve openly or not “has not impaired the morale, cohesion, readiness, or security of any unit”; the policy change has “not caused any degree of difficulty.”⁴⁵

A 2002 report by the British MOD reconfirmed that “there has been no discernible impact on operational effectiveness” as a result of ending the gay ban and that “no further review of the Armed Forces policy on homosexuality” was necessary.⁴⁶ In 2006, the MOD reiterated its commitment to welcoming open gays and lesbians, saying “The Armed Forces are committed to establishing a culture and climate where those who choose to disclose their sexual orientation can do so without risk of abuse or intimidation.” That year, the service branches began working with gay rights groups to recruit members, and over the next three years dropped rules banning gay service members from marching in gay pride parades in uniform.⁴⁷

A 2003 study of the South African military conducted by Palm scholars found that allowing openly gay service “has had little or no impact on recruitment, retention, morale, unit cohesion, or operational effectiveness.” And in 2007 an official and former officer from the Israel Defense Forces confirmed that Israel’s policy transition had been a success, saying, “It’s a non-issue.”⁴⁸ In 2009, the *Associated Press* spent two months investigating the experiences of foreign militaries with gay service, and reported that “Israel has had no restrictions on military service,” that same-sex partners are welcomed to officer events, and that the new policy of equal treatment is “now considered thoroughly uncontroversial.”

The updated investigations into the experiences of foreign militaries with openly gay service corroborates that none of the twenty-five nations that dropped their bans have experienced any detriment to cohesion, recruitment, or readiness. These results do not

mean that everybody was happy with openly gay service. Nor do they mean that such resistance and resentment were entirely without consequence. Many people were upset about the transition. Male service members, in particular, continued to express concern that the presence of known gays in a unit might damage morale, and the anti-gay sentiment sometimes manifested itself in harassment or abuse. But the evidence has been consistent that these reactions to the policy change did not translate into overall impairment of military effectiveness.

How Foreign Militaries Implemented Policies of Inclusion

Recently, attention in the U.S. has focused on how best to implement new policies of inclusion that do not discriminate on the basis of sexual orientation. Secretary of Defense, Robert Gates, has said that the Pentagon would require “at least a year” to implement repeal once the decision was made to lift the ban and that the military would spend months studying repeal and consulting the troops. Gates said that “trying to impose a policy from the top without regard for the views of” those directly affected by reform would be a “stupid” way to implement the change.⁴⁹

Yet research concludes unequivocally that such policy changes are most successful when implemented quickly. Such research is summarized in the 1993 Rand study, which Secretary Gates has asked to be updated. According to that report, the two most important factors in a personnel policy transition of this nature are decisive leadership and a single

code of conduct for all personnel. Rand found that a successful new policy must be “decided upon and implemented as quickly as possible” to avoid anxiety and uncertainty in the field. It stated that “fast and pervasive change will signal commitment to the [new] policy,” while “incremental changes would likely be viewed as experimental” and weaken compliance. It also concluded that “any waiting period permits restraining forces to consolidate,” and that “phased-in implementation might allow enemies of the new policy to intentionally create problems to prove the policy unworkable.” Finally, it recommended that any new policy be implemented and communicated “as simply as possible” to avoid piling on confusing changes incrementally that would force service members to endure new rules every few months instead of having to adjust only once.⁵⁰

New reports have also indicated that the study groups would address whether separate facilities, such as barracks and showers, would be needed in order to lift the ban.⁵¹ Yet Rand cautioned against instituting separate facilities for minority groups, citing the resentment and damaging focus on gender distinctions that have resulted from different standards for men and women.⁵² This is a point that was echoed recently by retired Marine General Carl Mundy, former Commandant of the U.S Marine Corps, who, despite opposing openly gay service, has said that “the easiest way to deal with it is to make it as simple as possible. The last thing you even want to think about is creating separate facilities or separate groups or separate meeting places or having four kinds of showers — one of straight women, lesbians, straight men and gay men. That would be absolutely disastrous in the armed forces. It would destroy any sense of cohesion or teamwork or good order and discipline.”⁵³ The idea was also rejected by Charles Moskos, widely

considered the intellectual architect of “don’t ask, don’t tell.” When President Clinton publicly considered segregated facilities in March 1993, an idea roundly cried down by gay advocates, Moskos mocked the idea: “Not only would there be physical problems, but also the problem of labeling units. What are you going to call these groups? The “Fighting Fags?” Come on, it can’t be done.”⁵⁴

Rand's research on the importance of a swift implementation has been borne out in foreign militaries that have lifted their bans. In the 1990s, court rulings in Canada and Britain mandated that gay troops be allowed to serve openly; in both cases, the transitions were implemented in a matter of months, and uniformly assessed as successful. The Canadian Forces announced it would accept the court ruling and end the ban immediately. “It does take a commitment from the top,” said John de Chastelain, then was Chief of the Canadian Defense Staff. He directed the military to revise its harassment guidelines, institute appropriate training programs, and formulate policies to address complaints and ensure enforcement of the new rules.⁵⁵ In Australia, a special committee recommended repeal and the government voted to move forward, with the Prime Minister ordering the policy change be implemented immediately. It was replaced with a general instruction on “sexual misconduct policy” prohibiting any sexual behavior that negatively impacted group cohesion and did not distinguish between homosexuality and heterosexuality. These successful examples suggest the research is correct that swift, simple implementation of a single code of conduct, backed by strong leadership from the top, is the most effective way to ensure a smooth transition to inclusive policies.

Case Studies

I. BRITAIN

The earliest research on the impact of openly gay service in Britain came from the British Ministry of Defence. In 2000, six months after lifting its ban, the Ministry of Defence issued a report about the impact of the policy change. The document was intended for internal use only and not for public release, suggesting it represented a candid, accurate assessment of the transition, without risk of being swayed by the requisites of politics or public relations. In addition, it had the benefit of full access to all available data.

The conclusions were definitive. The lifting of the ban was “hailed as a solid achievement” which was “introduced smoothly with fewer problems than might have been expected.” The MOD found that all three services “reported that the revised policy on homosexuality had had no discernible impact, either positive or negative, on recruitment.”⁵⁶ The review concluded that the new Code of Social Conduct had been central to the success of the new policy. Its emphasis on behavior now meant that commanders could make sure that the problematic conduct of any individual, if and when it arose, could be managed, and that operational effectiveness could, as a result, be maintained. Hence, the MOD noted that the code had become “a useful guide for commanding officers in dealing with all issues surrounding personal relationship and behavior, going wider than just homosexual issues.”⁵⁷ There was “widespread acceptance

of the new policy” and military members generally “demonstrated a mature and pragmatic approach” to the change. There were no reported problems with homosexuals harassing heterosexuals, and there was “no reported difficulties of note concerning homophobic behavior amongst Service Personnel.” The shift to inclusion meant that the military could now access more college recruiting fairs, which were previously off limits because of opposition to the ban from students and educational establishments. The report concluded that “there has been a marked lack of reaction” to the change.⁵⁸

Independent assessments by senior government and military officials in Britain consistently confirmed the military’s findings that lifting the gay ban had no negative impact on performance. “At the end of the day, operational effectiveness is the critical matter, and there has been no effect at all,” reported a high-level official. Just nine months after the new policy was instituted, this official told Palm Center researchers that “homosexuality doesn’t even come up anymore—it’s no longer an issue.” One lieutenant colonel reported that “there has been absolutely no reaction to the change in policy regarding homosexuals within the military. It’s just been accepted.” He said that emphasis on fair treatment and personal responsibility meant people had ceased to focus on sexual orientation and cared far more about individual performance and responsibility to the team. Even the very vocal worries about privacy and sharing showers and berths with gays—a perpetual focus of resistance in the U.S.—turned out to be unwarranted. A press official at the Ministry of Defence said that “the media likes scare stories—about showers and what have you. A lot of people were worried that they would have to share

body heat in close quarters or see two men being affectionate, and they would feel uncomfortable. But it has proved at first look that it's not an issue.”⁵⁹

Experts repeatedly expressed surprise at how little the change had meant, and how much easier the transition had been than what they expected, given the vocal resistance before the ban ended. The military's director of personnel said, “We've had very few real problems that have emerged, and people seem to have, slightly surprisingly, settled down and accepted the current arrangements. And we don't really have the problems that we thought we'd have.” An official of the Personnel Management Agency said, “The anticipated tide of criticism from some quarters within the Service was completely unfounded.” One commander attributed the smoother-than-anticipated transition to a generation gap, finding that “our youngsters have just taken it in stride.” He concluded that “it's a major non-issue, which has come as a considerable surprise.”⁶⁰

In 2002, the MOD revisited its new policy on sexual orientation and the Code of Social Conduct “in light of thirty months' experience since both were introduced.” Officials concluded that “there has been no discernible impact on operational effectiveness,” that the code had been “well received,” and that “no further review of the Armed Forces policy on homosexuality” was necessary.⁶¹ This is not to say that there were no negative outcomes associated with the policy. For example, the Army reported in 2002 that “homosexuals are not readily accepted by all, and this may influence an individual in deciding whether to expose his or her sexual orientation.”⁶² However, what both of the MOD's initial reviews and the systematic appraisal of the evidence carried out by Belkin

and Evans confirm, is that for all three services of the British Military, the transition from exclusion to inclusion had no tangible impact on operational effectiveness. The inclusion of gays and lesbians in the British Armed Forces had no impact on the military's ability to fulfill its function to defend the United Kingdom and its interests.

Recently, some opponents of gay service in both the U.S. and the U.K. cited the 2002 study as evidence that Britain had suffered negative consequences as a result of lifting its gay ban. They referenced an article published in 2007 by the conservative *Daily Mail*, entitled "Lifting Ban on Gays in Armed Forces Caused Resignations, Report Reveals" which claimed that the 2002 study showed that "Britain's armed forces faced a spate of resignations in protest when the government lifted the ban on homosexuals serving in the military." The 2002 report, however, nowhere mentions a "spate of resignations." Here is what the report says:

Navy: "When first announced the change in policy was not openly welcomed by many, but reaction was generally muted. Since that it has been widely agreed that the problems initially perceived have not been encountered, and for most personnel sexual orientation is a 'non-issue.'"

Army: "The general message from COs [commanding officers] is that there appears to have been no real change since the new policy was announced."

Air Force: “All COs agreed that there had been no tangible impact on operational effectiveness, team cohesion, or Service life generally.”

Regarding the “spate of resignations,” what the Ministry report actually says is that, “there remains some disquiet in the Senior Ratings’ Messes concerning the policy on homosexuality within the Service. This has manifested itself in a number of personnel electing to leave the Service, although *in only one case* was the policy change cited as the only reason for going. Nonetheless, homosexuality is not a major issue and, to put the effect of the policy change into context, the introduction of Pay 2000 and pay grading caused a far greater reaction.”⁶³ We sought comment from the Directorate of Service Personnel Policy at the British Ministry of Defence about the *Daily Mail* article. In response, we received an email stating: “We were irritated by the article because it put a very negative slant on what was, in reality, a positive outcome.”⁶⁴

The Royal Air Force has found its inclusive policy to be so successful that, since 2006, it has worked with Stonewall, the largest gay rights group in England, to help it attract gay and lesbian recruits. The deal means the Air Force was placed on Stonewall’s “Workplace Equality Index,” a list of Britain’s 100 top employers for gays and lesbians, and that Stonewall provides training about how to create an inclusive workplace environment with greater appeal to gays and lesbians. The Air Force also agreed to provide equal survivor benefits to same-sex partners and to become a sponsor of the Gay Pride festival. The MOD endorsed the policy in 2006 saying, “The Armed Forces are

committed to establishing a culture and climate where those who choose to disclose their sexual orientation can do so without risk of abuse or intimidation.”⁶⁵

The Air Force action was prompted in part by recruitment shortfalls. But the move also makes clear that the British Forces believe that a climate of inclusivity and equal treatment makes for a superior military, further evidence that the only impact of gay inclusion is a positive one. At the 2007 British gay pride parade, a Royal Navy commander made this point, stressing that what mattered to military effectiveness was teamwork. “If the team is functioning properly, then we’re a professional fighting force,” he said. “We want individuals to be themselves 100%, so they can give 100% and we value them 100%.” Background, “lifestyle” and sexuality were not a part of the equation, he said, adding that the armed forces recruit “purely on merit and ability” and new members become a “member of the team and are valued as such.”⁶⁶ As the MOD’s 2000 internal assessment had suggested, the replacement of a group-specific ban with a policy of equal treatment had helped to shift focus away from sexual identity, precisely the aim of the new policy. Because the British Code of Social Conduct emphasizes good behavior and fair treatment for all, sexuality has come to be regarded as a private matter and service members have been freed to concentrate on the duty of each member to behave in ways that are beneficial to the group. The report indicated that the policy change had produced “a marked lack of reaction. Instead of focusing on sexual identity, discussion is concerned with personal responsibility across the board, and on proper behavior rather than identity politics.

The MOD report also indicated that, because colleges no longer banned the military from campus, recruitment prospects were brightened by greater access to potential recruits: “Some areas that had previously closed to the Forces, such as Student Union ‘Freshers’ Fairs’ are now allowing access to the Services because of what is seen to be a more enlightened approach.” Indeed, the MOD called recruitment “quite buoyant” in the year after the ban was lifted. After several years of shortfalls, the year both before and after the policy change finally saw recruiting targets filled.⁶⁷

Recent Evidence

This section updates research conducted in the early stages of Britain’s policy change to provide a more comprehensive assessment of the overall impact of the transition to full equality for gays and lesbians. It adds recent testimonies of serving military personnel and experts on the transition and its long-term implications. The additional research shows that the British Military’s post-2000 measures on sexual orientation have been successful for one reason above all: instead of building policy around assumptions about what impact the presence of sexual minorities in the military could have, the MOD prioritized the impact of actual behavior on operational effectiveness. Though sexual behavior has always been important to British Military judgment on sexual orientation, the recognition that anyone can engage in behavior that could harm unit cohesion is highly significant. Moreover, it more accurately reflects the situation on the ground where the older notion that unit cohesion requires soldiers to develop deep interpersonal

bonds has been replaced by the recognition that soldiers bond through shared commitment to tasks. As such, *all* soldiers are now judged on their behavior, on their commitment to unit tasks, priorities, and discipline, irrespective of sexual orientation.

All the evidence indicates that the conclusion of the British Military's own internal reviews of the new policy, conducted both six months and 30 months after enactment, still applies: the transition has been characterized by a "marked lack of reaction" throughout the ranks.⁶⁸ A spokesman for the Ministry of Defence reiterated in 2010 that ending the gay ban in Britain had "absolutely no impact at all on operational effectiveness."⁶⁹ In 2006, the Navy became the first to allow troops to march in uniform at the annual Gay Pride parade in London in, and the Royal Air Force and Army followed suit in 2007 and 2008 respectively.⁷⁰

This is not to conclude, of course, that no one reacted negatively to the change; some members of the force complained about the new policy. But according to all available evidence, the transition has had no negative impact on the overall effectiveness of the British military. Because the policy change has had no perceptible impact on unit cohesion, morale, or operational effectiveness, it is widely regarded as an overwhelming success. In addition, there is no indication that the policy change has had any effect on recruiting, training completion, or resignation rates. There have been no widespread or endemic problems with harassment or sexual misconduct associated with the new policy. In short, the transition from inclusion to exclusion has been a smooth one. The section

concludes with a short discussion of the implications of the British experience for the United States Military.

The Code of Social Conduct does not offer an exhaustive list of unacceptable conduct, and it does give military commanders some discretionary authority in determining the detriment of a given incident to operational effectiveness. However, it targets behaviors that could undermine trust and cohesion, rather than members of a specific social group. These include unwelcome sexual attention, whether physical or verbal, over-familiarity with the spouses or partners of other service personnel, overt displays of affection which might cause offense to others, behavior that could damage the marriage or personal relationships of service personnel or civilian colleagues within the wider defense community, and taking sexual advantage of subordinates. While lesbian and gay personnel could behave in ways that breach the code, none of these behaviors are exclusive to them. The code could equally be breached by heterosexual personnel. That the code applies to all service personnel calls attention to the fact that there is no clear correlation between a person's sexuality and how he or she behaves. Indeed, the amount of time and resources that the MOD has spent tackling endemic sexual harassment of servicewomen by servicemen in recent years suggests that sexual relations between heterosexual personnel may be far more problematic for operational effectiveness than those between homosexuals, and that the social code is an important tool for commanders faced with such difficulties.⁷¹

Militaries have long regarded cohesion among soldiers as integral to maintaining operational effectiveness. The nature of that cohesion is still disputed⁷² but among the two most well-established positions that have emerged, it is task cohesion rather than social cohesion that overwhelmingly reflects the realities ‘on the ground’ among soldiers serving in Western Armed Forces.⁷³ Following World War II, many argued that “social cohesion” was the key determinant of military readiness, and that effectiveness is facilitated by “intimate interpersonal relationships” between military recruits.⁷⁴ Nonetheless, the second position, which arose from doubts over the reliability of social factors as a causal indicator of cohesion, suggests that “task cohesion”—a “shared commitment among members to achieving a goal that requires the collective efforts of the group”—is a much more reliable indicator of military readiness.⁷⁵ As we have noted elsewhere,⁷⁶ while the *idea* of social cohesion is still promoted in some British military doctrine, research with members of the British Armed Forces (2003- 2006) supports the claim that “military performance depends on whether service members are committed to the same professional goals.”⁷⁷ Consequently, task cohesion is far more important than interpersonal relationships for developing relationships of trust with fellow service personnel. The Code of Social Conduct reflects this fact by acknowledging that it is the *conduct* of individuals that can undermine the cohesion of tight-knit groups, not the identity of individuals *per se*. Thus in their 2000 review of the initial transition from exclusion to inclusion, Belkin and Evans found that behavior, rather than sexual orientation, is what ultimately matters to the men and women in the Armed Services:

As long as people do their jobs and contribute effectively to the teamwork of their units, individual differences in opinion or in their personal lives

are not considered relevant. The new policy's focus on behavior rather than on personal attributes has allowed heterosexual and homosexual soldiers alike to maintain their focus on the jobs at hand.⁷⁸

Evidence seems to suggest that ending gay exclusion policies may be the best way to move beyond the worrisome focus on sexual identity and its effects on military cohesion. This is certainly true for the gay and lesbian service members themselves, who generally “breathed a sigh of relief”⁷⁹ when they learned they no longer had to lie to serve their countries. But the effects of liberalization go beyond just the obvious impact on gays, to impact straight people too because they reach to the heart of heterosexual anxiety about their own role in the military, about how they should behave with respect to homosexuality and how they should interact with those they suspect or know to be gay.

Chief Petty Officer Rob Nunn was discharged from the Royal Navy in 1992 for being gay, and re-joined the British Forces after the ban was lifted in 2000. The response from his comrades was overwhelmingly positive when he came out, and he was even asked casually if his partner would be accompanying him to the Christmas Ball. But what's most instructive about Nunn's experience is the impact of the new transparency not on him but on his straight comrades. Immediately after his re-instatement, Nunn found his colleagues were unsure how to respond to him. “It's the old, ‘I don't know quite what to say,’” he explained in an interview. With one other service member, in particular, Nunn decided to guide him to a place of greater comfort, now that he could take advantage of the option to speak freely. This “one guy that I talked to who couldn't sort of talk to me, I said, ‘Right, I'm going to ask the questions that you want to ask, and answer them.’ So I did.” Nunn reported that the greater openness, whether it came from him or from

others, allowed any remaining discomfort to evaporate, and gave him the chance to counter stereotypes, expose friends to greater understanding and put people at ease. After helping his reticent comrade out of his shell, the person became “nice as pie.”⁸⁰

Patrick Lyster-Todd agreed that strong military leadership was essential to the success of Britain’s policy reform. An officer in the Royal Navy before the ban was lifted, Lyster-Todd later became head of Rank Outsiders, a group dedicated to lifting the ban. “Our MOD and serving Chiefs take Equality & Diversity issues—including the rights of serving gay personnel, whether out or not— incredibly seriously,” he said. “Their approach is that if you want to be a capable force for good in the 21st century, then you need to be of that century and its people.”⁸¹ Again, this observation is corroborated by research showing that controversial new rules are most effective when top leaders make their genuine support absolutely clear, so that the next layer of leaders, those who actually must implement the new rules, come to identify their enforcement of the new policy with their own self-interest as leaders of the institution.⁸²

Recent accounts of the transition of military policy on sexual orientation further attest to the importance of focusing on the impact of behavior on operational effectiveness, rather than assumptions about sexual identity. In recent correspondence with the MOD’s Diversity Team, officials made it clear that “the change of policy was achieved with no tangible impact on operational effectiveness, team cohesion or service life” and that service personnel “accepted the change in policy and business continued as normal.” They also emphasized that, within the British Armed Forces, “an individual’s

sexuality is considered to be a private life matter” and that sexuality alone is not viewed as something that inherently undermines trust and cohesion among service personnel.⁸³ Commander Debbie Whittingham, the commandant of the military’s Joint Equality and Diversity Training Center, described the policy change as a “non-event.” In her assessment, any concerns over operational effectiveness were quickly allayed by the fact that service personnel were aware that they may have served with gay and lesbian soldiers for some time, with or without knowledge of their orientation, and that disclosures by close colleagues of their sexual orientation after the policy change had little effect. Sexual identity in no way undermined those service members’ history of commitment to their units.⁸⁴

It is important to emphasize that the cultural context of the British Forces prior to the policy change was characterized by the exclusion and removal of lesbian and gay personnel from the armed forces. Perhaps for this reason, initial indications of the likelihood of a policy change were met with hostility by some in the armed forces. Lieutenant Commander Mandy McBain worked at this transitional time in the Directorate of Naval Manning.⁸⁵ Tasked with addressing the views and concerns of personnel on the impact of lifting the ban, she reported that she initially encountered “a general assumption amongst my seniors that they did not work with any gay people and therefore their homophobic comments were acceptable.”⁸⁶ She found it exhausting to conceal her true identity. “It’s quite incredible to look back and see how much time and energy I spent leading a double life,” she recalls. She even had to process the paperwork of homosexual discharges for peers.⁸⁷ Echoing McBain’s remarks, Craig Jones, a retired lieutenant

commander in the Royal Navy, recalled in 2009 that “the Ministry of Defence fought the European Court of Human Rights to the bitter end.” Yet he noted that “as the smoke cleared on the battleground,” what followed was “silence.”⁸⁸ For him, the introduction of the Code of Social Conduct in the House of Commons in January 2000 “ended overnight twenty years of pointless rhetoric-fueled arguments” because from that point on, “admirals, generals and air marshals dusted themselves down and returned to the important business of national defense and the men and women of our armed forces returned to their daily lives freed from almost daily vacuous discussions about ‘gays in the military.’”⁸⁹ Indeed, Jones pointed out that in his experience the 1990’s debate over service by gays and lesbians was perceived by many of his fellow colleagues, regardless of their personal views, as “an unwelcome distraction from the important business of ensuring fighting effectiveness.” It felt, at times, “as though politicians and military leaders were more concerned with the sexual orientation of their troops” than with ensuring that military personnel “were well motivated and well equipped to do their jobs.”⁹⁰ It was the political debate over the issue of gays in the military that served as a distraction to the focus on mission, not the actual presence of gay or lesbian personnel.

After the policy change, personnel involved in tracking, investigating, and dismissing sexual minorities “turned their attention to retaining and recruiting talent rather than searching it out and dismissing it,” according to Jones. He also said that the “U.K. inclusive policy characterized by the Armed Forces Code of Social Conduct gave back to our servicemen and women the freedoms of life which they may one day be asked to lay down their lives to protect.”⁹¹ Where anxieties have arisen, such as recent concerns over

how to manage applications for married quarters from same-sex couples who have entered into civil partnerships, these have been overcome through clearer guidance and implementation training. The MOD's approach to the provision of Service Family Accommodation (SFA) has been to treat same-sex couples in civil partnerships in the same way as married couples on the grounds that, like marriage, civil partnerships constitute the legal recognition of a relationship. Accordingly, SFA is not available to unmarried heterosexual couples or to same-sex couples who are not in civil partnerships because those relationships are not legally recognized. The MOD has also made it clear that while personnel are entitled to decline the provision of SFA on the grounds that they might end up living next door to a same-sex couple, they have no legal right to demand alternative accommodation. By clarifying their position in clear guidelines for commanders and personnel, the MOD has thus tried to ensure that all its personnel have the right to a private life.⁹² The British military has been so pleased with the success of the transition that it has taken steps to promote its new policy and demonstrate its success publicly.⁹³ According to Commander Whittingham of the military's Joint Equality and Diversity Training Center, all three services are now part of the "Diversity Champions" program run by the lesbian, gay, bisexual and transsexual rights group, Stonewall. All permit their soldiers to march at gay pride events in uniform, and various forums and focus groups supported by the military have been established for serving gay and lesbian service personnel.⁹⁴ As Jones put it, "the minor transitional bumps of implementation had ten times less impact than defending against this policy."⁹⁵

British military experts uniformly continue to pronounce the inclusive policy a success. Lord Alan West was head of the Royal Navy and is now terrorism minister for the U.K. West served both before and after the ban was lifted, and reports that “It’s much better where we are now. For countries that don’t [allow openly gay service], I don’t believe it’s got anything to do with how efficient or capable their forces will be. It’s to do with other prejudices, I’m afraid.” Peter Tatchell, a London-based gay-rights activist often critical of the government, praises the military’s handling of the change. “Since the ban has been lifted, there hasn’t been a word of complaint from senior military staff,” he said. “They’ve said that having gay and lesbian people in the services has had no damaging effect at all.”⁹⁶

Military expert and veteran Amyas Godfrey now works for the Royal United Services Institute, a think tank in Britain. When the British forces lifted their ban, he was serving in Northern Ireland, and he recalls: “I remember our commanding officer at the time called the entire battalion together and said, ‘This is how it is going to be now. We are not going to discriminate. We are not going to bully. If someone in your group says that he is gay, you treat them as normal.’ And that, really, was the implementation of it. For all the years I served after that, it was never an issue.”⁹⁷

Conclusion

Important lessons arise from the British experience for other militaries considering a transition from exclusion to inclusion of sexual minorities. As with any transition, there is scope for improvement. For example, an overemphasis on sexuality as a “private matter,” taken from the ECHR ruling, may reaffirm, rather than displace, the idea that sexual orientation is important when actually it is behavior that matters to operational effectiveness.⁹⁸ In the British case, this issue has been tackled to some extent through the development of support networks for sexual minorities and the endorsement of these networks by senior officers, as well as through task cohesion on the ground. Soldiers have quickly come to realize that their colleagues are no less effective than they were prior to the policy change and that being gay, lesbian, or bisexual does not affect a person’s ability to focus on, commit to, and complete the mission at hand. In the event of a shift to inclusion in the U.S. armed forces, it will be vital to emphasize that calling sexual orientation a “private matter” does not mean that “telling” is considered inappropriate or threatening to unit cohesion. It will be essential to focus on actual behavior and to draw links between behavior and military capability rather than identity and military capability.

Another issue is that the initial success of the Code of Social Conduct depended in part “on the leadership style and view of the officer or officers delivering the message.”⁹⁹ What this means is that “strong leadership is absolutely vital” along with “a deeper understanding by those delivering the message” that “may enhance understanding” such

as information on “why the rules have changed, the cost to the military for additional training, recruiting and administration to replace those dismissed,” and so forth.¹⁰⁰ Making what might be called the “business case” for inclusion will help soldiers to see the benefits of a policy change. Similarly, senior military personnel need to be very clear about how, and whether, entitlements and allowances applied to heterosexual service personnel such as family housing, travel warrants, and schooling for children, apply to personnel in same-sex partnerships.¹⁰¹ The British approach has been to offer such incentives to those in civil partnerships. But the federalist system in the U.S. differs in important ways from that of the U.K. and currently the American Defense of Marriage Act bans federal recognition of same-sex couples. Finally, a zero-tolerance approach to bullying and harassment, in addition to training on this approach, would be necessary in the U.S., although it is important to note that the current “don’t ask, don’t tell” regulations already provide for this, despite uneven enforcement.¹⁰² Any accommodation of such discrimination based on status instead of conduct could send the message that identity continues to be the main focus instead of behavior. A uniform code of conduct for all service members, along with sufficient training, guidance, and leadership about that code, is the most effective way to ensure that behavior is the proper focus of both policy and practice.

The original ECHR ruling about the U.K. policy did not suggest that homosexual behavior could not, or would never be, a possible source of tension among military personnel. However, it did find that by assuming that all lesbian and gay soldiers—or potential soldiers—would undermine unit cohesion, regardless of how they behaved, the

military had violated the rights that lesbians and gays have to a private life,¹⁰³ as well as their right to be judged on their merits. The most important lesson from the British experience of transitioning from a policy of exclusion to one of inclusion is the importance of focusing on the problematic behavior of any service person, that which has the most impact on operational effectiveness. By addressing behavior rather than relying on assumptions about how a member of a specific social group might behave, all behavior that poses a threat to military readiness and capability can be managed effectively without having to exclude specific members of the forces who may be contributing to operational effectiveness in significant ways. The above testimonies demonstrate a clear consensus within the British military, shared by the wider British society, that the policy change has had no clear impact on military effectiveness. A systematic study of the impact of the policy change, rather than a focus on military judgment, would still be valuable,¹⁰⁴ but all available evidence supports the conclusion that the policy change was a success: allowing open lesbians and gays in the military has had no adverse impact on military capability, and the new focus on a uniform code of conduct appears to enhance the professional climate of the armed forces.

II. CANADA

The earliest comprehensive assessment of the impact on the Canadian Forces of full inclusion was conducted by the Palm Center in 2000. The key conclusion reached by

Palm researchers was that the 1992 decision was seen as a “non-event,” with neither increased departures by heterosexual members nor significant numbers of complaints filed by gay members concerning harassment or other overt acts of discrimination. According to their report, “Lifting of restrictions on gay and lesbian service in the Canadian Forces has not led to any change in military performance” and GLBT personnel “who have served since the ban was lifted describe good working relationships with peers in supportive institutional environments where morale and cohesion are maintained.”¹⁰⁵ Palm researchers identify three key factors that likely contributed to this success. The first was the CF’s decision to focus on behaviors rather than attempt to shift attitudes. The second was the decision to address behaviors through broad harassment training that neither singled out sexual orientation nor ignored it as a potential source of conflict. The third was the clear leadership exercised by the CF Chief of Defence Staff and the most senior leadership cadre in announcing and implementing the policy change.

In 1986, six years before the Canadian Forces lifted the gay ban, a survey of 6,500 male service members found that 62% would refuse to share quarters with gay soldiers and 45% would not work with gays. But by several accounts following the transition, the change had no overall impact on the effectiveness of the military. “The nine months since a court case induced Canada's military leaders to open the ranks to gays have been virtually casualty-free,” according to a 1993 *Washington Post* investigation. “No resignations, violence or harassment have been reported. Gay soldiers, while remaining discreet about their private lives, say they feel more comfortable now. And straight soldiers—not only those who have concerns about gays, but also those who do not—say

they have accepted the new regime.”¹⁰⁶ More than two years after gay exclusion ended, according to a Canadian Forces assessment, there was no mass exodus and no indication of any impact on cohesion, morale, readiness, recruitment or retention.¹⁰⁷ A review by a bureau of the Canadian military found that, “despite all the anxiety that existed through the late 80s into the early 90s about the change in policy, here’s what the indicators show—no effect.”¹⁰⁸

This section provides additional commentary regarding the context of the 1992 decision, and then provides an overview of subsequent developments in CF policies, doctrine and programs, including consideration of the two key issues that are implied but not examined in the 2000 study regarding changes in attitudes over time and combat effectiveness. In addition to reviewing the 2000 study by the Palm Center about the successful transition by CF to full inclusion, this section offers additional information that can help explain the “non-event,” and particularly to help observers understand why the problems predicted in the 1986 survey did not occur. In particular, we address two fundamental questions that arise out of the experience of the CF. Given the negative attitudinal findings of the 1986 survey, the first question pertains to whether, by choosing to focus on behaviors and not attempting to influence attitudes, the CF has allowed the dominant culture to remain strongly heterosexist, thus diminishing the opportunities for gay members to integrate their personal and professional lives to the degree that their straight colleagues can. The second question arises from the central argument previously presented by the military regarding the possible impacts on morale, cohesion, combat readiness and operational effectiveness. That argument went as follows: although the CF

was engaged in a number of complex missions in the 1990s including in the Balkans, Somalia, Rwanda and East Timor, the Canadian military had not been tested in the heat of battle to the level that the U.S. military has been; thus, the full effects of the 1992 decision had not been assessed where it counted the most. Skeptics of full inclusion used this reasoning to argue that the data on lifting the ban was insufficient to pronounce it a success.

1986-1995: A Decade of Social Evolution in the CF

In order to fully appreciate the policy changes implemented in 1992 regarding gays serving in the military and the perceived “non-event” in the years immediately following, it is necessary to consider the other policies and programs that were also under challenge, review or amendment during the period from 1986 to 1995.¹⁰⁹ As with many other militaries, the CF had faced a number of calls to amend existing policies and rules due to changes in broad government legislation and evolutions in societal norms. Further, the military was going through significant shifts in understanding its role and missions given the end of the Cold War and the emergence of new forms of conflict.¹¹⁰ Finally, the CF had received marked negative publicity because of an incident during its 1993 mission in Somalia in which soldiers beat to death a Somali youth taken into custody; the event served to focus external public and political attention as well as CF senior leadership.¹¹¹

Employment of Women: In the context of concurrent changes, the most important development pertains to the employment of women in the military. The CF had been continuously evaluating or amending policies regarding the employment of women since the early 1970s.¹¹² Following the enactment of the Canadian Human Rights Act in 1978, a series of research trials and suits against the CF culminated in a landmark Canadian Human Rights Tribunal decision in 1989. The Tribunal stated, “The issue is: does ‘operational effectiveness’ constitute a bona fide occupational requirement of such a nature that the exclusion of women from combat-related occupations is justified, even though it is, on its face, a discriminatory practice.” It found that the CF had not made the case to retain the exclusionary policy and directed the CF to achieve full and complete gender integration in all occupations and all roles except submarines by 1998.¹¹³

In contrast to the relatively low-key approach taken in 1992 to amend the policy for gays in the military, the issue of the employment of women, particularly in combat roles, was of high visibility across the CF from 1979 through to the mid-90s, with commensurate visible leadership from the top to set the tone and ensure success. The changes incurred the same core concerns as the 1992 policy change for gays in uniform, that is, concern over erosion of cohesion and diminution of operational effectiveness.

Employment Equity Act: A further catalyst for proactive programs in the military was the passage by the Canadian Parliament of the Employment Equity Act (EE Act) in 1986. This legislation requires that federal government agencies take steps to address the historical marginalization of four designated groups: women, Aboriginal peoples, visible

minorities and persons with disabilities, with the goal of achieving equitable representation in all areas and at all levels of employment.

Religious Accommodation: Although it pre-dated the EE Act, another major focus of policy change pertained to initiatives to update or amend policies regarding religious accommodation. Starting with the amendment of dress regulations to enable members of the Sikh faith to wear a turban as military headdress, changes have been implemented to enable minority members of the CF to dress, eat, and pray in accordance with their religious beliefs.¹¹⁴ As a major supporting initiative, the CF Chaplaincy Branch adopted a policy of multi-faith service with all Chaplains to minister to members of all faiths to the best of their ability in as open a manner as possible.¹¹⁵

Defence Ethics Program: The final program development that occurred concurrently in the 1988-1992 period was the implementation of the Defence Ethics Program (DEP). The DEP presents a values-based framework centered around three ethical obligations: respect the dignity of all persons; serve Canada before self; and obey and support lawful authority. The perception that the lifting of the ban on gays in the military in 1992 was a “non-event” is rooted in some part in the first prong of the DEP focus: respecting the dignity of all persons.

A key component of DEP was the development and implementation of broad-based professional development programs as both stand-alone workshops and as modules incorporated into professional military education (PME) across the CF. A series of

surveys was conducted during the 1990s to assess the ethical climate in the CF and a range of resource materials were made available.

Somalia and Canada's 'Blue Beret' Image: No summary of the evolution of CF policies, programs or culture during the 1990s can be complete without a consideration of the events surrounding the deployment of the Canadian Airborne Regiment to Somalia in 1992-93. On the night of March 16, 1993, a small number of Canadian soldiers beat to death Shidane Abukar Arone, a 16-year-old who had been taken into custody when found in the Canadian compound. The subsequent outcry among Canadians and criticism of senior military leadership by politicians led to the disbanding of the Airborne Regiment in disgrace and to the firing of the Chief of the Defence Staff, General John Boyle. Some years later, in 1997, the Minister of National Defence directed a series of sweeping changes to be implemented by the CF in order to regain the trust and confidence of Canadians.¹¹⁶

Among other concerns, the events surrounding the Airborne Regiment prior to and during the deployment to Somalia highlighted concerns regarding racism, prejudice, and a “rogue” culture that was at odds with the more respectful and ethics-focused norms of the Canadian military and society. The death of Shidane Arone struck a deep chord with Canadians as the vast majority of the citizenry had viewed their military as “Blue Berets” conducting random acts of kindness in far-off places.¹¹⁷ While Canadians are not naïve and most recognize Canada’s war fighting contributions in the First and Second World Wars and the Korean conflict, the dominant view among citizens is that Canada should

use its military primarily to project values, not to project force. It is for this reason that the Somalia incident had far greater consequences for Canadians and the CF than appears to have been the case in the US with events such as Abu Ghraib.

This overview of changes occurring in the CF around the time of the 1992 decision to remove the ban on gays serving in uniform reveals that the institution was engaged in addressing a number of concurrent issues related to changes in civilian culture. To some extent, the observed “non-event” was due to the fact that the decision to lift the ban on gays was seen as a rather minor issue in comparison to these other concurrent changes. While Palm researchers identified the role of senior leadership and the decision to address behaviors using broad programs rather than implementing initiatives to change attitudes or single out gay members, there are two more fundamental explanations as to how the CF was able to implement the wide range of policy changes needed to address all of the social evolution. The first was that the senior leadership recognized that the central issue in all cases pertained to culture and identity and, in particular, the requirement to ensure that key aspects of the CF culture reflected that of Canadian society. The second was to articulate the requirements, objectives, and desired ends using shared, key principles that underpinned how the military (collectively) served the nation and how each individual served the military. A fairly consistent message was that the role of leaders has been, is today, and always will be, to take well-trained, highly motivated, talented individuals who want to serve their country in uniform and transform them into cohesive, effective teams.

It should also be noted that, when taken together, the issues presented in this section compelled the CF to examine two myths that the military had been telling itself: first, that military culture was fine as it was and senior leadership needed no outside assistance to create a more dynamic, adaptive culture; and second, that the military alone should be the final arbiter of balancing operational effectiveness with individual rights- a view the Canadian Human Rights Tribunal clearly dismissed when it concluded that “the risk to individual rights is high when women are excluded from any occupations, and the risk to national security is, by comparison, low.”¹¹⁸

Finally, while this update confirms that the cancelation of the previous policy was a non-event from the perspective of the CF, not all agreed. A minority of politicians was opposed to some of the related policy changes and clearly dismissed the legitimacy of, or need for, the CF to address the requirements of gay communities.

1996-2009: Recent Changes within Canadian Society and the CF

Until recently, no systematic research had been conducted to specifically examine the experiences of gays in uniform after the ban was lifted. Following is an update on the impact of changes in Canadian society and the CF on the experiences of gays in uniform.

Same-sex Marriage: The legal recognition of marriage between same-sex partners occurred over the course of several years as provincial governments amended statutes, and culminated with the federal government doing so in 2005. This measure has

generally had broad support as illustrated in a September 2009 public opinion poll in which 61% of Canadians supported same-sex marriage and only 11% indicated that same-sex couples should have no legal recognition. As legislation was passed, the CF moved quickly to amend a host of related policies including those regarding pay, pensions, married quarters, relocation benefits etc. As an example, Interim Guidelines for CF Chaplains for same-sex marriages were issued in September 2003 and the first publicly acknowledged same-sex marriage of two service members took place in May 2005.¹¹⁹ These guidelines address key principles, and clearly highlight the importance of the Defence Ethics Program's focus on the obligation to respect the dignity of all persons.

Outreach and Community Engagement: Over the last few years, the CF has also developed more proactive approaches to engage with the gay community. One example is the creation of a Facebook site for the Canadian Forces Gay, Lesbian, Bi and Heterosexual Group.¹²⁰ Although the posting states it is not an official CF site, the presence of the CF logo, the use of military ranks, and the identification of both a Group Harassment Advisor and Bilingualism Officer (common CF unit-level secondary duties) are all indicators of an implicit acknowledgement and endorsement of this site by the institution. While this site provides an accessible means of social support, members of the gay community have requested that the CF appoint a formal senior "champion" (at the LGen or MGen level) as has been done for the four EE designated groups. To date, this effort has been unsuccessful.

A clearer example of formal outreach to the gay community pertains to participation in Pride Parades. These events are now held in many Canadian cities with Toronto Pride Week estimated to draw 1 million participants. At the request of gay and straight members of the CF, permission was given in 2008 for CF members to participate in Pride Parades in uniform. In 2009, this was extended to a more formal outreach program which is intended to raise awareness of, and garner the support of Canadians for the CF by showcasing the men and women of the CF. This initiative is seen to support recruiting and diversity efforts with clear statements of the principle that “embracing diversity contributes to the relevance of the CF as a national institution in that Canadians see themselves when looking at the CF... Moreover, diversity is an operational imperative because it acts as a force multiplier as we conduct more operations in non-traditional theatres.”¹²¹ For a number of Pride Parades this year, volunteers from across the CF were on duty participating in the parades in uniform handing out promotional items to those in attendance and at an official recruiting booth.

Research: As mentioned, relatively little research has been conducted in the CF that is specifically focused on issues related to the inclusion of gays in the military. One area that has been examined pertains to legal proceedings. In an update to a comprehensive analysis of CF cases, the author of that work confirmed that, as of summer 2009, there have not been any courts martial since 2000 for either sexual misconduct involving gay members or for inappropriate behaviors directed at gay members.¹²²

To return to one of the original areas of research, little has been done to re-examine the 1986 survey that was interpreted to reveal strong opposition to removing the ban on gays serving in uniform. As the CF had focused on regulating behaviors, rather than changing attitudes, a major question that remained unanswered in the 2000 report was whether the opinions expressed particularly by heterosexual males in 1986 have persisted. Research conducted in both the U.S. in 1998 and 1999 and in Canada between 2001 and 2004 provides a partial answer and, with some time lag, a partial cross-national comparison. As part of a comprehensive research program examining the “civil-military gap” in the U.S., a team led by Dr. Peter Feaver analyzed attitudes of mid- to senior-level officers which was replicated in Canada.¹²³ 215 senior CF officers (Major to Colonel) attending Canadian Forces College (U.S. Staff and War College equivalent of Professional Military Education) completed a detailed survey of attitudes and opinions.¹²⁴ The following three paragraphs were presented in the report comparing the responses of the senior CF Officers to their U.S. colleagues of the same ranks:

The two groups [Canadian and American] provided rather different perspectives on a number of items related to diversity and gender roles. Only a minority (21%) of Canadian survey respondents embraced the idea that “the military should remain basically masculine, dominated by male values and characteristics” whereas 41% of their American peers had agreed. Very few believed that military effectiveness was greatly hurt when women entered the workplace (3%), due to the military becoming less male-dominated (3%) or due to bans on language and behavior that encouraged traditional patterns of camaraderie (7%).

The divergent views of the two militaries were evident in responses on the roles of women in uniform. 78% of Canadians agreed that women should be allowed to serve in combat jobs while only 38% of Americans supported such a policy... 81% of Canadians reported that they would be equally confident with a female as they would with a male Commanding Officer (CO) (vs. 67% in the US).

The differences between Canadian and American respondents in openness were even more marked regarding the employment of gays and lesbians in uniform. While 68% of the Canadian respondents agreed with the CF policy allowing gay men and lesbian women to serve openly in the military, only 18% of their American colleagues supported adopting such a policy. Although only 28% of Canadians indicated that they would be more comfortable with a straight CO than with a gay CO, 65% in the US preferred a commander who was straight.

Although the sample is small and clearly not representative of all ranks, it is seen as an indicator of a significant shift in attitudes and opinions regarding both gays and women in uniform since the 1986 study that was reported to reveal strong opposition. Further, in comparison to the general CF population, this sample over-represented older males, operational occupations (MOS), and those on a command career path, all factors that would predict a more conservative outlook than expected from a broader cross-section of the CF.¹²⁵ Not all of the attitudinal responses of this cohort of senior CF Officers were seen as positive, however. Note, for instance:

In particular, although this group did not oppose the inclusion of individuals on the basis of gender or sexual orientation, they were somewhat complacent in assessing that the CF had achieved what is required to fully accommodate these groups. Some of their responses represented a latent resistance with perceptions that standards were easier for women and that the initiatives to integrate women had eroded military performance. Of more importance, the assessment of the CF's progress was rather optimistic and over-stated... Thus, while there were not signs of overt resistance, there appeared to be a 'perception gap' between what these military leaders believe had been accomplished and what may actually be required to achieve CF diversity objectives.

Doctrine and the prototype "Combat Male Warrior": One of the initiatives that came directly out of Somalia but was also informed by the other events identified in the previous section's decade of social evolution was a significant effort to establish and update CF Doctrine. The most important of the doctrine manuals produced was the 2003

publication, *Duty with Honour: The Profession of Arms in Canada*.¹²⁶ This manual “presents the theoretical and philosophical underpinnings of the profession, shows how in practice it serves Canada and Canadian interests, and, codifies, for the first time, what it means to be a Canadian military professional.”¹²⁷ Key in this articulation was the view that the CF should predominantly project values rather than force, and its military ethos should reflect both martial/war-fighting values and broader Canadian values of acceptance and inclusion. Martial values, uniquely emphasized in the military to ensure technical success, include such concepts as service before self, self-sacrifice/unlimited liability, fighting/warrior spirit, teamwork, and self-discipline. Civil values that were given prominence included notions of rights and freedoms and the obligation to respect the dignity of all persons.

The language chosen and the symbols used to communicate the intent of the manual were selected so as to carefully balance the fundamental role, character, and nature of the profession of arms as responsible to the state for the defense of the nation with the evolving, broader, and more complex expectations particularly for the CF as a partner with allies and other agencies in achieving integrated security solutions under comprehensive approaches.

The related doctrinal change was the subsequent publication of *Leadership in the Canadian Forces: Conceptual Foundations*. Drawing on the central concepts in *Duty with Honour*, *Conceptual Foundations* presents a values-based leadership model that emphasizes transformational leadership approaches and, under the concept of “leading

the institution,” highlights the individual and collective responsibilities of leaders at all levels to set the conditions for small unit/team success in operations. The unifying theme of respecting the dignity of all persons is highlighted in this manual along with other key messages about drawing on the strengths of diverse teams.¹²⁸

Together, these two doctrine manuals are intended to establish an appropriate philosophical, sociological, and ethical framework to enable the CF to evolve to meet both emerging societal expectations and to achieve complex (human) security missions. Of particular relevance for this review, *Duty with Honour* strove to retain the concept of the “warrior’s honor” while shifting away from the dominant prototype of the “combat male warrior.”¹²⁹ The (gradual) acceptance of a redefined model soldier- one who values a range of characteristics and behaviors- is key to achieving broadly defined diversity objectives, particularly for gays in uniform.

Combat and Operational Settings: This brief section addresses continued reservations by those who consider the 2000 report to be an inadequate assessment of the CF’s 1992 transition to full inclusion since it had not yet been engaged in major combat missions at the time. Since taking a significant role in southern Afghanistan as well as engaging in naval interdiction and counter-piracy off the Horn of Africa, the CF certainly believes it has answered the general question of its collective combat capabilities on land, in the air, at sea, and in special forces contexts. In doing so, the CF has sustained significant losses (relative to the size of the CF) as well as standing its ground in the face of a rather determined insurgency. Our observation, based on extensive discussions with military

leaders, is that the CF believes that soldier-for-soldier, man or woman, gay or straight, it is capable of punching above its weight. Although there has not been any systematic research to specifically examine the consequences of fielding combat units containing women or gays, Dr Anne Irwin, an anthropologist who studies the CF, recently spent several weeks with combat soldiers in Afghanistan. Extending the key conclusion reached by Belkin and McNichol, she stated:

My intuitive feeling was that it was a non-issue. Sexuality to a large degree is irrelevant; what matters is whether someone is reliable, loyal and hardworking. Good sense of humor, a joiner, rather than a loner. Beyond that, I don't think anyone really cares.¹³⁰

Voices and Perspectives: Key themes that emerge from Canadian scholars' work on the perspectives of gays in uniform¹³¹, as well as from service members' comments to the authors of this study, are as follows:

1. Invisible Identity. Several academics and some serving members have commented that one of the effects of the decision to cancel the previous policy in 1992 was that it made gendered and sexual identities invisible.¹³² By adopting an approach of "benign neglect," the CF has prevented members of the gay community in uniform from engaging in meaningful dialogue about their identities. This issue appears to be of significant importance for those who are transgender, as was indicated in the legal proceedings by Micheline Montreuil.

2. "1 of 1." The combination of invisible identities and small numbers in uniform leads to a sense by some of being "1 of 1." There is a feeling of isolation and frustration that

each person has to deal with the issues that confront them on their own, with little or no institutional support. This experience contrasts with that of others in uniform who have had to deal with issues that were either not common or not formally acknowledged, but for which programs were developed to provide them with support, such as single parenthood, elder care, learning differences, PTSD, and mental illness.

3. Procedure. The sense of isolation and lack of institutional supports impair full access to the available procedures such as filing formal complaints in the event of wrongdoing. Individuals must have confidence in both the results of filing complaints and the processes used to adjudicate them for such procedures to accomplish their stated goals of justice. One service member commented, “Most queer people do not believe that going through the harassment complaint process is anything but a way of painting a big rainbow target on our heads.” One result of the absence of complaints is that leaders wrongly conclude that all is well or that the CF is doing as much as is needed.

4. Career Implications. The input received suggests mixed results about the effects that open homosexuality can have on one’s career. Some feared that declaring their identity would indirectly have career consequences while others perceived and experienced no problems. From the background research and some comments received, it is plausible that a differentiating factor may be the role that different individuals take on or the degree to which they make their identity visible. Several of the comments received indicated that some of those who were open about their identity felt an obligation to put in extra

effort, achieve higher standards of proficiency, or demonstrate greater commitment to pass the “dedication” test before their presence and performance were accepted.

5. Ignorance and Prejudice vs. Acceptance and Belonging. From comments received, it is evident that the time period during which individuals joined the CF shapes how gays in uniform experience daily life: those who joined pre-1988 still recall the “witch hunts” and need for secrecy, while those who joined more recently did not experience this treatment. An additional theme that emerged from respondents was frustration with the degree of ignorance demonstrated by a minority of their military colleagues. The misunderstanding of key facets of the gay community, conflation of gender identity with sexual identity, and assumptions about gender or sexual identity based on certain behaviors clearly lead to actions or statements that are received as harmful or prejudicial, with the sense that better education could prevent such problems. Conversely, several respondents commented on growing acceptance by their CF colleagues as gay members have “earned” the right to serve through their performance and professionalism.

In their 2000 review of the perspectives of gays in uniform, Palm researchers quote a comment by CF member Michelle Douglas that “gay people have never screamed to be really, really out. They just want to be really safe from being fired.”¹³³ This update would suggest that their perspectives have evolved to the point that gays in uniform would appreciate greater factual knowledge and understanding if and when they choose to come out. Above all, they want to be judged on their performance, not their identity. Thus, the main shift noted among gays in uniform is that their expectation has grown

from merely hoping to hold onto their job to aspiring to have a full career, which allows them the same balance of work and personal lives as their heterosexual counterparts.

Conclusion

This report, which updates previous research on gays in the Canadian Forces, confirms that the transition to full inclusion remains a non-event, and it supports the finding that effective leadership, a focus on behaviors, and the use of a comprehensive program to prevent personal harassment contributed to the smooth transition. It also provides some additional contextual factors that help explain the social evolution of the CF throughout the 1990s and 2000s, including effecting policy and program changes to address employment of women in combat roles; increasing representation of women, Aboriginal Peoples, and visible minorities at all ranks; accommodating a range of religious belief systems and associated practices; and confronting the fallout from criminal behaviors during the Airborne deployment to Somalia. Underlying these changes were the beliefs that the central issues pertained to culture and identity, key principles mattered more than rule changes, and leadership would play a strong role in realigning existing military culture.

Culture, principles, and leadership have retained their central importance as the CF has continued to evolve from 2000 to 2009 in response to broader social trends and internal expectations. A significant illustration of the development of CF institutional approaches

toward its gay members can be seen in the formal outreach initiatives with gay and straight members in uniform representing the CF in Pride Parades. Research about current attitudes suggests a significant shift from those reported 15 years earlier, with general acceptance of both the policy and gay members in uniform, although a degree of perhaps premature complacency was noted among some older CF members.

The final updated information provides some glimpses into the views and perspectives of the gay community within the CF. The issues that were raised were related to: dealing with identities that the institution has made invisible; feeling isolated as a minority that does not have the same status or supports afforded other sub-groups; lacking confidence in the current mechanisms of procedure for complaints in the event of wrongdoing; and difficulties confronting the minority of colleagues who do not, will not, or cannot understand the nuances of gender or sexual identity or the privilege given to the dominant heterosexual community to define what is “normal.” Conversely, there are indicators that some are having success in their careers, and there were no significant indications that the CF was lagging behind society as a whole. While some are still reluctant or cautious in bringing their personal life into their professional domain, the comments by researchers and some gays in uniform suggest there is an expectation that all individuals should be judged solely on competence and performance and that identity should not be a factor. Using a common model for assessing inter- and intra-group relations, this expectation reflects a desire by gays in uniform to move from marginalization to integration rather than assimilation (loss of meaningful personal identity) or separation (loss of meaningful institutional role).¹³⁴

In assessing the continued evolution of the CF, it would appear that the institution is currently in a phase of engaging gays but demanding their conformity; ultimately, it may progress to a phase in which it embraces a range of worldviews and appreciates the strengths and benefits of such a position. Whether or not it does so depends on four factors: the continued evolution of broader social norms and expectations within Canadian society; the scarcity of talent and need to be more proactive in recruitment and outreach; the implications of new security missions in nations such as Afghanistan; and the continued redefinition of the ideal soldier, from “combat male-warrior” to “soldier-diplomat,” “soldier-scholar,” and “soldier-Samaritan.”

III. AUSTRALIA

In June 1993, seven months after the Australian ban on homosexual service was lifted, the U.S. General Accounting Office conducted interviews with ADF officials to document early outcomes associated with the change.¹³⁵ The short overview of the policy change concludes with a summary statement based on comments from an Australian official who stated that, “although it is too early to assess the results of the revised policy, no reported changes have occurred in the number of persons declaring his or her sexual preference or the number of recruits being inducted. Effects on unit cohesiveness have

not yet been fully determined. However, early indications are that the new policy has had little or no adverse impact.”¹³⁶

In February 1996, the U.K. Ministry of Defence completed a report documenting the findings of its “Homosexuality Policy Assessment Team” that investigated homosexual personnel policies of a number of foreign militaries. A research team was sent to Australia to meet with representatives of the Royal Australian Air Force, Royal Australian Army, and Royal Australian Navy, as well as with Dr. Hugh Smith of the ADF Academy, and service psychologists at ADF headquarters in Canberra. The British team reported that service staffs believed the change had not resulted in any notable problems for military functioning. Following an initial outcry, said the report, homosexuality became a “non-issue” and the difficulties of integrating open homosexuals were described as “just another legitimate management problem.”¹³⁷

In 2000, the Palm Center reviewed all available data pertaining to the lifting of the ban in Australia. It found that the transition did not lead to “any identifiable negative effects on troop morale, combat effectiveness, recruitment and retention, or other measures of military performance.”¹³⁸ Some evidence suggested that the policy change may have contributed to improvements in productivity and working environments for service members. Key findings included the following:

- Prior to the lifting of the ban, ADF service chief argued that allowing homosexuals to serve openly would jeopardize recruitment, troop cohesion, and

combat effectiveness while also spreading AIDS and encouraging predatory behavior

- Senior officials, commanders, and military scholars within the ADF consistently appraise the lifting of the ban as a successful policy change that has contributed to greater equity and effective working relationships within the ranks.
- Senior officials, commanders and scholars report that there has been no overall pattern of disruption to the military. Recruitment and retention rates have not suffered as a result of the policy change. Some individual units have reported disruptions that were resolved successfully through normal management procedures.
- While the lifting of the ban was not immediately followed by large numbers of personnel declaring their sexual-orientation, by the late 1990s significant numbers of officers and enlisted personnel had successfully and largely uneventfully come out to their peers.
- Gay soldiers and commanders successfully served in active deployments in East Timor. Many of them describe good working relationships in an environment that emphasizes capable and competent job performance under uniform rules of conduct for all personnel.
- Complaints regarding sexual orientation issues comprise less than 5% of the total complaints received by the ADF of incidents of sexual harassment, bullying, and other forms of sexual misconduct. Of 1,400 calls received by an anonymous “Advice Line” maintained by the ADF to help personnel and commanders manage potential misconduct issues since this service was initiated in August

1998, 17 (1.21%) related to sexual orientation issues. To the degree that harassment issues continue to exist in the Australian Forces, most observers believe that problems faced by women soldiers are more serious than those faced by gay personnel.

Consulting experts in Australia offers evidence that cohesion and morale are enhanced by the transition to equal treatment. Australia's human rights commissioner said he believed his country's termination of the ban had positive effects on the military. "It's bad for morale to have your guys snooping on others of your guys," he concluded.¹³⁹ This conclusion is borne out by evidence from gay service members, who reported after the ban ended that the liberalized policy allowed them to spend less energy monitoring what they and others said and more focusing on their work. One Army captain, Squadron Leader Chris Renshaw, who later became Senior Marketing Officer for Defence Force Recruiting, said that under Australia's new policy, "you can be more honest. That's one of the key things about being in the military—honesty and integrity. Because you haven't got to worry about if someone's saying something behind your back, or is someone gossiping or something, because if they gossip, I don't care. So I'm more focused on my job, I'm more focused on what I'm achieving here, and less worried about [rumors] and what people think. In terms of productivity, I'm far more productive now... Everything's out in the open, no fear, no nothing, no potential of blackmail, no security implications... nothing."¹⁴⁰ Renshaw spoke of the positive impact of the new opportunity for casual banter, so much a part of the military bonding experience. Planning to take his male partner to the Christmas party, he told his superior as a courtesy. "He just looked at

me with a bit of a pained expression and said, ‘I expect you to behave.’ And I just sort of looked at him and said, ‘Look, knowing the other people that work on this floor and how they behave with booze, you’re worried about me?’”¹⁴¹

An enlisted member of the Royal Australian Navy echoed the importance of teasing as a form of bonding, and the positive role of joking even about sexual orientation: “I’m quite open about my sexuality. Sometimes the boys decide to give me a bit of a ding-up with a joke or something like that, but that doesn’t bother me. We work really well together, and I’m sure it’s the same for other gay and lesbian soldiers and sailors who are out, and they’re accepted by their peers. O.K.—they’re the object of ridicule sometimes, but everybody is.” Military experts must surely understand how central it is for young people in the armed forces to navigate their relationships, in part, through playful insults and one-upmanship, at times becoming caustic or even aggressive. It’s no secret that the military functions as a proving ground, both as part of the training process and apart from it. Yet many of these experts have cherry-picked instances of gay-straight tension and cast them as dangerous examples of social strife, when in fact it is part and parcel of the military bonding experience.¹⁴²

The director of the ADF’s Defence Equity Organisation, Bronwen Grey, reported that despite early fears of deleterious consequences, the lifting of the gay ban had no adverse effects on the capability or functioning of the Defence Forces. Following implementation, she said, “Nothing happened. I mean, people were expecting the sky to fall, and it didn’t. Now, a number of gay people probably didn’t come out at that point, but we’ve had an

X.O. of a ship come out and say to the ship's company, 'I'm gay,' and, quite frankly, no one cared. There was no increase in complaints about gay people or by gay people. There was no known increase in fights, on a ship, or in Army units" and the "recruitment figures didn't alter." She said that Commanders "were watching out for problems" but "they didn't identify any. Now that doesn't mean there weren't any, but they didn't identify any. Grey summed up the transition this way: "All I can say is, from the organizational point of view, while we were waiting for problems, nothing happened. There were no increased complaints or recruiting [problems] at all. I mean nothing happened. And it's very hard to document nothing."¹⁴³ An openly gay squadron leader, Michael Seah, said that he served actively in what is widely considered to be one of Australia's most successful military deployments in recent years—the United Nations peacekeeping operation in East Timor.¹⁴⁴ Another gay soldier commented, "Looking at the current operation in East Timor, I've got a number of gay and lesbian friends in an operational situation. I have served in Bougainville, and there is no problem."¹⁴⁵

Some indication of the success of the ADF's transition comes from an interview with Commodore R.W. Gates, a senior warfare officer with substantial command experience and widespread familiarity with deployments. At the time of the interview in 2000, Gates had been in the Royal Australian Navy for twenty-nine years, having commanded a number of frigates and served in policy positions in the personnel division at Defence Headquarters in Canberra. He was subsequently promoted to Commodore in the Joint Personnel area in Career Management Policy, and later became Director General of Career Management Policy. Like other observers, the Commodore described mixed

opinions and strong emotions within the Forces at the prospect of allowing homosexuals to serve openly: while nobody would deny that homosexuals existed in the ADF, whether they should “declare” their orientation was another matter. When the policy did change, serious protests all but disappeared, and formerly closeted personnel stepped forward successfully and largely uneventfully. “I must admit,” said Gates, “after it happened, it’s been an absolute non-event. We’ve had some major cases of people declaring. Probably the most that I recall... would be one of our executive officers of a destroyer, the second-in-command. He declared. And, I’ll be frank, it created a bit of a stir. We’re talking about a mid-rank lieutenant commander in an absolute critical position on board a major warship, one heartbeat from command... That person under the new policy was certainly not removed from the ship, and in fact completed his full posting.” The Commodore attributes the largely successful transition to a broader effort on the part of top officials in the Navy and the ADF to develop aggressive new training protocols to minimize harassment and maximize equality of opportunity.¹⁴⁶

Dr. Hugh Smith, a professor at the University of New South Wales at the Australian Defence Force Academy, echoed Gates’ judgment. A leading academic authority on military personnel policy, Professor Smith said that the lifting of the ban did not lead to any significant effects on military performance, combat effectiveness, or unit cohesion. Like other respondents, he characterized the outcome of the policy change as a virtual “non-issue,” with little remaining salience in government, media, or military circles. The lack of quantitative empirical data regarding the policy change constituted, in his opinion, a form of evidence. In Professor Smith’s words, “This is not a subject that has troubled

the Defence Force to the extent that they have felt that studies have needed to be done on it. The lack of evidence is evidence.”¹⁴⁷ He explained that when government ordered the military to lift the ban, some officers said, “Over my dead body, if this happens I’ll resign.” However, Smith said that there were no departures and that the change was accepted in “true military tradition.” To the degree that problems of sexual misconduct and harassment continue in the ADF, Professor Smith indicated that they are mostly related to the treatment of women in the ranks and incidents of hazing (referred to as “bastardization”) in the Academy.¹⁴⁸

In 2000, retired Major General Peter Philips was president of the Returned and Services League (RSL) of Australia, a major veterans group similar to the American Legion. In 1993, the RSL was an ardent opponent of proposals to lift the ban, arguing that doing so would jeopardize morale, unit cohesion, performance, and decency in the Armed Forces and would hasten the spread of AIDS. Asked whether any of these problems had come to pass, he told researchers that openly gay service has “not been a significant public issue. The Defence Forces have not had a lot of difficulty in this area.”¹⁴⁹ Probed for evidence suggesting that allowing homosexuals to serve impaired military performance, combat effectiveness, or unit cohesion, he replied, “If the issue had arisen, it would have in [peacekeeping operations in] East Timor. I haven’t heard of any gay issues in that.”¹⁵⁰

Major General Philips acknowledged that some gay personnel had come out to peers but disagreed with assertions made by some groups that there were significant numbers in combat units. Journalist David Mills, who interviewed service members for several

stories dealing with same-sex partner benefits and combat service in East Timor, gave a conflicting account. For his investigation of East Timor, Mr. Mills spoke with gay soldiers who had served actively. He was aware of seven or eight active duty soldiers serving in East Timor who self-identify as gay, and he interviewed an enlisted Army soldier who worked as a firefighter. In 2000 he reported, "I spoke with a guy who is serving in the Army, a six-month stint in East Timor, speaking about his experiences. He was an interesting guy who said there is a lot less homophobia in the Armed Forces than you might think, although he was pretty selective about who he was open about his sexuality with... He said he didn't have any problem with that [coming out] whatsoever, although there was an element of surprise when he told people."¹⁵¹

By 2009, the RSL had withdrawn its opposition to openly gay service. Retired Major General Bill Crews, its former president, said that year that concerns about morale and AIDS had not panned out. "I was there in the early days of it," he said. "I thought there'd be a continuing problem because of prejudice that exists in parts of the community." He said, "I don't see any evidence now that homosexuals are in any way discriminated against. A homosexual can be just as effective a soldier as a heterosexual."¹⁵²

In the spring of 2009, 100 active-duty service members, including at least one general, marched in Sydney's Gay and Lesbian Mardi Gras Parade holding an ADF banner. Chief Petty Officer Stuart O'Brien, who has served in the navy for nearly 20 years, reported that he worked shoulder to shoulder with U.S. military personnel in Baghdad in 2006, and that being openly gay was not an issue in those or other operations. "They valued the

work that I did and that's all that it comes down to at the end of the day,” O'Brien told the Associated Press in 2009. “Sexuality has nothing to do with anything any more within the services.”¹⁵³

Neil James is executive director of the Australian Defence Association, a non-partisan, independent national security think tank. He is a graduate of the Royal Military College, served in the Australian Army for more than thirty years, and is the author of numerous ADF and Army operational manuals and journal articles on the Australian military. James' 2009 assessment of the ADF policy change was that it was uneventful besides some surprising disclosures of the sexuality of high-level officers. “Everyone said, ‘Good heavens, that's a bit of a surprise,’ and after five minutes the conversation reverted back to football,” he said. “After a while it was met with a collective yawn.”¹⁵⁴

Currently the ADF recognizes a range of same-sex relationships on generally equal footing with married relationships. As of December 2005, the military agreed to grant same-sex couples in recognized “interdependent partnerships” the same rights and privileges afforded to members with other types of dependants, such as a spouse or children. To gain ADF recognition of an interdependent partnership, members must prove they maintain a common household with their partner (who may be of the same or opposite sex but is someone to whom they are not legally married), and that they have lived together on a permanent basis for at least 90 continuous days.¹⁵⁵ Once a service member has proven the existence of such an interdependent partnership, the couple are entitled to receive the same benefits as legally married couples, including income support

and relocation, housing, education, and/or travel assistance.¹⁵⁶ Recently Australia's largest community-based LGBT health organization partnered with other groups to launch "Pride in Diversity," a not-for-profit program created to assist Australian employers with the inclusion of LGBT employees. The Department of Defence joined with a number of other prestigious Australian employers, including the Australian police force, to become a foundation member of the program.¹⁵⁷

Conclusion

In 1992 when a government committee recommended the ADF drop its gay ban, the full government voted to end the policy and Prime Minister Paul Keating ordered that the policy change be implemented immediately across all services of the ADF. In place of the previous ban, the government issued a more general instruction on "sexual misconduct policy." Among other provisions, the new instruction referred to unacceptable conduct without making a distinction between homosexuality and heterosexuality. Rather than define what was unacceptable based upon sexual orientation, the new instruction prohibited any sexual behavior that negatively impacted group cohesion or command relationships, took advantage of subordinates, or discredited the ADF, and provided commanders with latitude to judge whether a certain behavior was acceptable or not in a certain context.

Assessments by the U.S. General Accounting Office, the British Ministry of Defence, and the ADF itself all found that the change in policy has been successful and has not led to

any perceptible decline in operational effectiveness, morale, unit cohesion, retention, or attrition. In fact, ADF officials and independent observers believe that changes associated with the policy have contributed to a working environment that is freer from the burdensome and unproductive consequences of mistrust, misunderstanding, and misjudgment that at times compromised the integrity of units in the past.

In the decade following the policy change, some concerns remained about uneven and partial implementation of the policy, and about isolated instances of discrimination and harassment, which also disproportionately affected heterosexual women. More recently, however, the fact that the debate over gays in the military has shifted away from the question of whether homosexual soldiers undermine military performance and toward a practice of treating all members according to a single standard also stands as a testament to the success of the inclusive policy.

IV. SOUTH AFRICA

In 2000 the South African Department of Defence undertook a major study to fully assess the environment for gay and lesbian personnel in the military. An in-depth survey was completed by 2,648 regular force members. The survey report noted that many respondents were undecided on many survey questions, and that there was often a large disparity between the attitudes of various subgroups within the SANDF regarding gays and lesbians. On many issues, officers, whites, personnel from the military medical

service (SAMHS), and personnel in the Office of the Secretary for Defence held more pro-gay attitudes than Africans, members of the Army, and members with lower ranks (Results N.D.).¹⁵⁸

Overall the results suggested that the transition had proceeded with great success despite military opinion remaining mixed. Only a quarter of the respondents agreed with the statement, “I feel good about the integration of gays in the military” while nearly a half disagreed. Just over a quarter were “undecided.” The question leaves unclear whether those who did not feel good about the integration of gays were opposed to service by gays or felt the climate for gays in uniform was simply not positive. However, half of respondents agreed with the statement, “I do not mind my co-worker being a gay or a lesbian” while only a third disagreed. More respondents were opposed to having a gay commanding officer than were in support (43% to 41%) even though a larger number disagreed with the statement, “Gays and lesbians as leaders do not command the same respect and obedience from subordinates as heterosexual leaders” than agreed with it (40% to 34%). Interestingly, a plurality of respondents agreed that gays in uniform would “undermine social cohesion. Only a third thought gays and lesbians were “morally weaker” than heterosexuals, while nearly two fifths disagreed with this statement.¹⁵⁹

While these opinion polls are inconclusive, this fact in itself is illuminating, since the overall research indicates a successful transition to openly gay service. In 2003, the Palm Center conducted a study that found that the integration of gay and lesbian personnel into SANDF had been achieved without any significant impact on effectiveness. The study,

based on interviews with over two dozen experts and a comprehensive review of all relevant government documents, newspaper articles, academic studies, and other materials, found the following:

- The integration of gays and lesbians in the SANDF has had little or no impact on recruitment, retention, morale, unit cohesion, or operational effectiveness.
- Some gays and lesbians who served in the apartheid era military (pre-1994) were subject to aversion shock therapy, chemical castration, hormonal and drug therapy, and other forms of abuse and torture.
- While anti-gay attitudes still exist at the level of the unit and in more rural areas, there has been a steady improvement in attitudes towards gays and lesbians in the SANDF. When expressed, anti-gay sentiment has been subtle in its expression and has not involved overt acts of harassment, discrimination, or anti-gay violence.
- There is no significant public opposition to the policy of integration.
- There has been no mass coming-out as a result of the policy change, but gays and lesbians within the SANDF report an increased level of comfort and are increasingly viewing the SANDF as a career option.
- The SANDF initially included a statement of non-discrimination against sexual minorities in its policy on Equal Opportunity and Affirmative Action, but is now in the process of adopting a separate, stand-alone, and much more detailed policy on sexual orientation in the SANDF.

- The SANDF is in the process of eliminating all residual bias against sexual minorities in subsidiary policies. Same-sex “life-partners” now have equal access to health benefits.
- Racial integration occurred at the same time as the integration of the sexual minorities within the SANDF. Racial integration has been a far more difficult process than the integration of sexual minorities.

Effect of Integration on Anti-Gay Attitudes: Numerous military officials reported that there is now “zero discrimination” in the SANDF against gays and lesbians. “No incidents of blatant harassment or discrimination based on sexual orientation . . . or violence against gays and lesbians... have been reported to Equal Opportunities Chief Directorate since the Equal Opportunities policy was adopted,” according to Colonel Jan Kotze.¹⁶⁰ This sentiment was echoed by those outside of the military who monitor these issues. Thandi Modise is the Chairwoman of the Portfolio Committee on Defence in the South African Parliament. “You just don’t hear the stories that we used to hear before 1994 of the levels of intolerance for gays,” Modise says. “If there are incidents, they are very few and far between... because I don’t hear about them.”¹⁶¹ Advisor to the Defence Minister, Sue Rabkin, reported that anti-gay discrimination “certainly hasn’t affected anyone I’ve heard about, and usually these things travel. I get quite a lot of information and I haven’t heard a peep.”¹⁶² Evert Knoesen monitors discrimination complaints both in his position on the Minister’s Advisory Board and as director of the Equality Project. Since integration, the only complaints he is aware of have dealt with residual discrimination in employment policies—pensions or health benefits, for example. “These

issues have all been cleared away,” Knoesen states. While he thinks it is possible that gay or lesbian personnel might not report harassment or violence easily, he concludes “that if people are prepared to complain about [pensions or health benefits], then if they had been physically assaulted or something like that we probably would have heard about it, or at least some of it.”¹⁶³

Generally the law remains ahead of social attitudes in South Africa. The policy enjoys very strong support among military and governmental leaders, but there is still a residue of anti-gay sentiment. That sentiment seems to be concentrated in the following locations: 1) among an older cadre of soldiers. “You do have people from the old school who have trouble accepting the sexuality of other people,” M.P. Thandi Modise concedes¹⁶⁴; 2) among lower level management and at the level of the unit.¹⁶⁵ If there is still a problem, Evert Knoesen concludes, “it is among the lower ranks”¹⁶⁶; 3) in rural areas and among commanding officers from rural homeland armies. How much the culture of the military has changed since integration, according to archivist Anthony Manion of the Gay and Lesbian Archives, “depends a lot on where you are in the country at the time.”¹⁶⁷ Evert Knoesen concurs: “Most of the people who serve in the defence force are from rural and impoverished areas, and they have very little exposure to lesbian and gay issues.”¹⁶⁸

Effect of Integration on Operational Effectiveness: Overall, informants agreed that the integration of gay and lesbian personnel has not had a negative impact on recruitment and retention, morale, unit cohesion or operational effectiveness in the SANDF. Heinecken

reports that in the SANDF (as in the United States) commanders found that gay service members conducted themselves professionally and “their sexual preference did not detract from their ability to perform their work successfully.”¹⁶⁹ Thandi Modise, who is a Member of Parliament with considerable expertise on military issues as the Chair of the Parliament’s Portfolio Committee on Defence, asserts that “the effect on morale has only been positive because members of the defence force do not have to hide.”¹⁷⁰ Colonel Jan Kotze concurs, stating that “diversity contributes towards increased morale, unit cohesion, and ultimately mission readiness.”¹⁷¹ Colonel Rocklyn Williams, Director of the Defence Program for SAFER-Africa, a South African think-tank, and a former SANDF commander, simply concludes that the integration of gays and lesbians into the SANDF has had “no impact whatsoever” on operational effectiveness.¹⁷²

Military experts and outside experts commonly asserted that the integration of gay and lesbian personnel has been more or less a non-issue, dwarfed by challenges of much greater magnitude. The integration of several different forces has proved hugely difficult, as has racial and gender integration.¹⁷³ All of this has had an impact on mission readiness for the SANDF, “but this is not related to lesbian and gay people,” says Evert Knoesen.¹⁷⁴ “When the SANDF was formed there were so many other issues,” concurs Heinecken, “integrating seven different forces into one, the end of conscription, racial transformation, and all of these things override the issue of gays and lesbians in the military.” She concludes: “This has not been a major issue.”¹⁷⁵ Democratic Party MP and Defence Committee member Hendrik Schmidt states: “Operational effectiveness has been affected by a number of other factors, but I wouldn’t isolate [the integration of gays and lesbians]

as being one of them.”¹⁷⁶ Rocklyn Williams concurs: “Gay and lesbian issues are the least of people’s worries,” he says. “The force has had to rise up to the most monumental challenges.”¹⁷⁷

Democratic Party MP James Selfe, is a former member of the Portfolio Committee on Defence. While he agrees that there are some soldiers who are unhappy about gays in their units, he states that these attitudes have no impact on mission readiness or operational effectiveness:

I happen to know that there is an old Guard within the SANDF . . . who have what might be called an attitude problem with regard to integrating gays and lesbians into the defence force. I think these people disapprove of the policy, they find it irritating or offensive. But I don’t think that this would affect the operational effectiveness of the defence force. It is a disciplined environment. Your personal feelings are less important than might be the case in other organizations. Orders are orders and you have to make the best job of it.¹⁷⁸

Other research subjects stated that gay integration had very little impact on mission readiness or operational effectiveness because of the relatively small number of soldiers involved. (As a point of contrast, the South African military has gone from being a predominantly white to a predominantly black force in a matter of a few years.) Colonel Rocklyn Williams concludes that “because most gays in uniform keep their sexual orientation to themselves, it is not something that surfaces very often.”¹⁷⁹ Henry Boshoff concurs that the integration of gays and lesbians in the SANDF “has had almost no impact because it is a small group of people.” Similarly, Colonel Raymond Marutle, the Military Attaché at the South African Embassy in Washington D.C., assesses the impact of the new policy on gays and lesbians on the SANDF as “none whatsoever,” and attributes that to the fact that the “percentage of gays and lesbians [in the SANDF] is

low.” Boshoff further argues that the integration of gay and lesbian service members has not been disruptive because the policy “has been implemented in a very professional and discrete manner.”¹⁸⁰ Marutle says similarly that “there is no overall negative picture that one could paint of this policy” and that both “non-gays and gays are happy with this policy.”¹⁸¹

As a result, there is virtually no public opposition to the policy integrating gays and lesbians into the SANDF. Even the African Christian Democratic Party, which spearheaded opposition to the inclusion of sexual orientation in the Constitution and has been vocal in the past in its opposition to gays in the SANDF, has retreated from this position. “We don’t have a problem with gays and lesbians in the SANDF,” says Mighty Madasa, Member of Parliament and Defence spokesperson for the ACDP, “everyone has a right to work.”¹⁸² Asked to identify other political actors in South African who oppose the open service of gays and lesbians in the military, Madasa stated: “there aren’t any.”¹⁸³

It is noteworthy that most of the people interviewed for this study stressed the homophobic nature of South African society. Opponents of openly gay service in the U.S. frequently maintain that successes in other nations are irrelevant to the U.S. because other countries have more pro-gay climates. But as sociologist Jacklyn Cock writes, “homophobia is intense and widespread in post Apartheid South Africa,” despite the Constitution. “Gays and lesbians continue to be denied cultural recognition and are subject to shaming, harassment, discrimination, and violence.”¹⁸⁴ Nevertheless, the policy of openly gay service has been broadly deemed a success, a conclusion borne out

by other research showing that prejudice, whether against racial minorities or sexual minorities, does not need to be abolished in order for policies of integration to work effectively.¹⁸⁵

Jody Kollapen, Director of the South African Human Rights Commission, states that the policy has been successful in that it has “aligned the military’s policy with the Constitution,” and that it provides a clear, understandable benchmark “against which acts of discrimination can be judged.”¹⁸⁶ Graeme Reid concurs that the policy “has changed the parameters” such that “it is not okay to be overtly discriminatory.”¹⁸⁷ Further, Kollapen credits the new policy with creating an atmosphere where issues of gay and lesbian equality can be taken up within the SANDF. “Previously there wasn’t even room for this discussion,” Kollapen asserts.¹⁸⁸

Moreover, while more can be done to increase tolerance within the SANDF, major inroads have been made. “A significant number of Defence Force members are now willing to serve with lesbian and gay personnel,” says Knoesen, “and the majority of the officer core has accepted this change.”¹⁸⁹ Perhaps most significantly, the policy has made a difference in the lives of gay and lesbian personnel. “I think that the policy has had a strong impact,” Reid asserts, “having official protection makes all the difference.”¹⁹⁰ Evert Knoesen emphasizes not only the magnitude of the transformation the military has undergone, but in how short a time span:

Eight years ago it was illegal to be in the Defence Force and be a homosexual. Now it is illegal to discriminate against someone who is homosexual in the Defence Force. The kind of impact that this has on the emotional experience of a homosexual in the Defence Force is very

significant. It takes you from the experience of being unwanted to the experience of self-validation.¹⁹¹

Conclusion

The SANDF, along with South African society generally, have undergone massive transformation since 1994, and the integration of gays and lesbians in the military has been a relatively easy part of that transformation. This report concludes that the integration of sexual minorities has been achieved without any negative consequences for the South African military. There has been a significant decrease in violence, harassment, and discrimination directed towards sexual minorities. The policy of integration has achieved the support of military and governmental leaders and the officer core, and is steadily gaining in acceptance among lower ranks.

In contrast to the situation in the United States, in South Africa laws pertaining to gay and lesbian people are far ahead of social attitudes. “Homosexuality is permitted by law,” Lindy Heinecken concludes, “rather than accepted.”¹⁹² Because of this, the South African case is a striking example of how leadership at the highest levels can transform a military culture that is much more hostile to gays and lesbians than our own. As recently as the 1970s and 1980s, the SADF permitted human rights abuses against some gay and lesbian service members—including shock treatments, chemical castration, drug therapy, and even gender reassignment surgeries. Today, while certainly not all vestiges of anti-gay attitudes have been eliminated within the military, the DOD has taken major strides

towards creating an environment within the military in which gay and lesbian personnel feel safe and want to work. This dramatic transformation has been achieved both by sending a message of “zero tolerance” for anti-gay harassment, discrimination, and violence throughout the command structure, and where possible, putting a few key gay and lesbian leaders both inside and outside the military in a position to monitor the policy.

It is also important to note that the integration of gays and lesbians has been made at no cost to the military in terms of operational effectiveness. Both gender and racial integration have been vastly more difficult for the SANDF. Indeed, that racial integration has been so much more problematic for the SANDF than the integration of gays and lesbians raises some interesting historical comparisons. When the U.S. military integrated racially in the 1940s, the U.S. was one of the most racist societies in the world—more so than South Africa at that time, with Jim Crow in the South every bit as severe as apartheid would later become. Despite the fact that the U.S. military was far ahead of social attitudes regarding race relations, racial integration was and continues to be a huge success. (Indeed, members of the SANDF now attend training at the U.S.’s Defense Equal Opportunity Management Institute.)

The racial integration of U.S. forces after World War II is of course parallel to what the SANDF is now undertaking. But the SANDF is also undertaking the integration of sexual minorities *at the same time*. By all accounts, this latter project has been far less difficult for the SANDF—even in a country where social attitudes regarding

homosexuality are far from progressive. All of this suggests that the integration of gays and lesbians into the U.S. armed forces—after that institution has already achieved dramatic success in terms of racial integration, and in a society where, *in sharp contrast to South Africa*, social attitudes are in many ways more progressive than the law—could be carried out relatively easily, without significant cost in terms of military readiness or operational effectiveness.

V. ISRAEL

In 1993, U.S. government and academic researchers studied the Israel Defense Forces by reviewing data and conducting interviews with embassy and IDF officials, active and reserve military personnel, scholars, Israeli lawmakers, and civil rights groups. The researchers from GAO and Rand found that Israel’s long-standing informal inclusion of homosexuals in the military had neither created internal problems nor jeopardized combat units. Officials interviewed for the GAO report stated that homosexual soldiers performed as well as heterosexual soldiers. Based on the officials’ experience, homosexual soldiers had not adversely affected “unit readiness, effectiveness, cohesion, or morale.” Security personnel noted that homosexual soldiers were able to hold security clearances without posing an unnecessary security risk.¹⁹³

Reuven Gal, the director of the Israeli Institute for Military Studies, wrote in a 1994 assessment of the policy transition that, “According to military reports, [homosexuals’]

presence, whether openly or clandestinely, has not impaired the morale, cohesion, readiness, or security of any unit. Perhaps the best indication of this overall perspective is the relative smoothness with which the most recent June 1993 repeal of the remaining restrictions on homosexuals was received within the IDF and in Israeli society as a whole.”¹⁹⁴ Even, or perhaps especially, in the context of a country continuously at war, unrestricted participation in the military by sexual minorities serves to bolster the core Israeli value of common defense of the nation rather than threaten military cohesion or morale.

A 1999 article on gays in the military published in the IDF news magazine *Bamahane* includes comments from seventeen heterosexual soldiers about their attitudes toward having a gay commander.¹⁹⁵ Two of the seventeen soldiers interviewed for the *Bamahane* article felt that serving under a homosexual commander would constitute a problem for them. One soldier explained that “The truth is it would be a bit strange for me. Not that I am primitive or homophobic, but among my friends there aren’t any gays. I would try to get used to the idea and if I did not succeed I would request a transfer. I do not think that gays are less good, but it would be a bit difficult or strange for me.” The rest of the respondents stated that the sexual orientation of their commanding officer would not make a difference to them. For instance, one respondent said, “I respect gays a lot. There is no problem with their service in the Army. It is none of my business if my commanding officer is gay. If he has already decided to participate this does not have to interfere with work.”¹⁹⁶

Three soldiers expressed some concern about showering with a homosexual soldier, although they stated that in general they did not have a problem with gay soldiers. Second Lieutenant Gal in Human Resources explained his feelings: "I don't have anything against homosexuals in the army. They're citizens of Israel like you and me. The sexual orientation of the workers around me doesn't interest me. It does interest me if his output suffers from it, maybe if it bothers him and he needs help. I wouldn't shower with him. There are cubicles here [at the officer's training base]." Eight of the respondents stated that they have no problems showering with sexual minorities. Dima, an officer, expressed the prevailing view of the respondents who brought up the issue: "They're citizens of the state, like all the other citizens. I think that even if they have a different sexual orientation, that doesn't have anything to do with hateful feelings. I don't have a problem showering with [homosexuals]. It seems to me that it wouldn't be a problem."¹⁹⁷

In 2000, the Palm Center conducted a literature review, bolstered by interviews with three dozen experts on all sides of the debate over gay service in the IDF. None of the experts located could recount any indication that the lifting of the gay ban compromised military effectiveness. Several remarks from the experts interviewed make this case. Professor Stuart Cohen, a Professor and Senior Research Fellow at the Center for Strategic Studies at Bar-Ilan University who has written extensively on the Israeli military, reported that, "as far as I have been able to tell, homosexuals do not constitute an issue [with respect to] unit cohesion in the IDF. In fact, the entire subject is very marginal indeed as far as this military is concerned".¹⁹⁸

One female soldier who served in the IDF between 1993 and 1996 was asked if she had experienced any problems because of her sexual orientation. She stated: “I was quite amazed to find out that people either thought that my sexual orientation was ‘cool’ or were indifferent to it.”¹⁹⁹ That experience was echoed in an ABC News interview with Israeli Brigadier-General Oded Ben, when he commented that Israelis show “a great tolerance” with respect to homosexual soldiers in the military.²⁰⁰

Amir Fink, the co-author of *Independence Park: The Lives of Gay Men in Israel*, argues that the IDF policy changes, among larger societal changes, have resulted in a more open attitude in the military. Fink believes that, “after the 1993 change in regulations there are more soldiers who are aware of the fact that there are gays in the unit and [that] they should treat them decently.”²⁰¹

Available evidence suggests that many homosexual soldiers choose not to disclose their sexual orientation while in the IDF. This is consistent with research from other nations showing that, even when gay bans are lifted, they do not result in a mass coming out.

Danny Kaplan is a cultural psychologist at Ben Gurion University and Bar Ilan University in Israel, whose expertise is Israeli military culture and sexuality. His 2003 book, *Brothers and Others in Arms: The Making of Love and War in Israeli Combat Units*, explores military culture in Israel through the prism of the dozens of gay veterans he interviewed. Kaplan states that, “although some [homosexual service members] came out to close friends in their unit, as a whole they did not disclose their dispositions

publicly in the context of their combat platoon.”²⁰²

The impact of ending gay bans has nevertheless been shown to have positive impacts on gay and straight troops, as it relieves people of the burden of concealment, suspicion, and distrust. A woman who decided to bring her partner to one of her base’s social events in 1997 explains that “the decision was preceded by consultations with my professional commander... He recommended to me quite warmly not to hide my sexual orientation and promised to support me professionally if there were any problems following my revelation.”²⁰³ One scholar found that military personnel generally reported positive responses to their coming out. In a 1997 interview with a uniformed soldier at a gay pride march, he was told that appearing in uniform did not cause problems with military officials: “Not at all. I can come here in uniform. The military command is accepting of [gay and lesbian soldiers]”²⁰⁴

A tank corps soldier reported in 1999 that “I have not had any problems being gay. On the contrary, in my base we had a large gay contingent. You would come to the base, and you know one other gay person, who knows another gay person, etc... In my basic training, people knew that I was gay and it was enough that there was one homophobe in my unit... After that, I had nothing to be afraid of.”²⁰⁵ A June 2000 Israeli television broadcast that was sanctioned by the IDF featured homosexual active-duty and reserve soldiers discussing their experiences of being gay in the military.²⁰⁶ Another officer said she had no problems rising through the ranks as an out lesbian. When asked how overall attitudes had changed from before the 1993 policy change, the major replied: “I have felt

a change for the better, mainly in the attitude of security officers, but not as big a change (because not as big a change was needed) as it seems by the change in army regulations.”²⁰⁷

These and other sources indicate growing openness. Although many homosexuals in IDF combat and intelligence units do not acknowledge their sexual orientation to peers, some known gays do serve in such units. Indeed, some IDF combat and intelligence units have developed a reputation as particularly welcoming to gay and lesbian soldiers.

The IDF does not conduct any special education or sensitivity training related to sexual orientation issues. In contrast, the Israeli military provides training on sexual abuse of women and harassment of new immigrants and Mizrachim, Israelis of North African or Middle Eastern origin.²⁰⁸ One board member of Agudaht Zechuyot Ha-ezrach, Israel’s primary gay-rights group, expressed overall approval of the military’s policies toward sexual minorities but other scholars and representatives of gay rights groups have declared that the IDF could do more to address the concerns of sexual minorities in the military and that many soldiers are not aware of official policy.²⁰⁹ The Israeli army currently recognizes the partners of gay officers and offers them benefits including next-of-kin rights.

In 2000, seven years after the ban was lifted, two scholars conducted in-depth interviews with 21 self-identified gay IDF combat soldiers and found that five of them (23.8%) were known to be homosexual by at least one other member in their combat unit.²¹⁰ The same

year, the Palm Center administered a survey to 194 combat soldiers in the Israel Defense Forces that included the following question: “Do you know (or have known in the past) a homosexual or lesbian soldier in your unit”? The findings showed that 21.6% of respondents knew a gay peer in their unit, and an additional 19.6% may have known a gay peer in their unit. Even in combat and intelligence units with known gay soldiers, however, we found no evidence of deterioration in cohesion, performance, readiness or morale. Generals, ministry officials, scholars, and NGO observers all have claimed that their presence has not eroded cohesion, performance, readiness or morale.²¹¹ As Kaplan stated in his 2003 book, Israeli soldiers “served on the frontline” and were “full participants in the military enterprise and were seen as such by their peers.”²¹²

In 2007 an official and former IDF officer re-confirmed that the policy transition had been smooth and uneventful. “It’s a non-issue,” said IDF veteran David Saranga, Israel’s American consul for media and public affairs. “There is not a problem with your sexual tendency. You can be a very good officer, a creative one, a brave one, and be gay at the same time.”²¹³

In 2009, the *Associated Press* spent two months investigating the experiences of foreign militaries with gay service. The ensuing article concluded that today “Israel has had no restrictions on military service,” that officers are accompanied by their same-sex partners at ceremonies and promotions, and that the policy of inclusion is “now considered thoroughly uncontroversial.” It reported that “gays and lesbians—among them several senior officers—serve in all branches of the military, including combat duty.” Yagil

Levy, a respected Israeli sociologist said that, “In this regard, Israel has one of the most liberal armies in the world.”²¹⁴ It is important to note that this openness exists despite the fact that Israeli society remains largely homophobic. Despite legal protections for gay, lesbian and bisexual citizens, and despite the absence of a robust “culture war” involving religious and cultural conservatives, the culture continues to frown on homosexuality as falling outside the mainstream of national and religious expectations for the state of Israel.

How far Israeli (military) culture has come in acceptance of homosexuality is evident in the case of the Israeli military magazine *Bamahane*. Nine years ago, in 2001, the topic of homosexuality was so controversial that when the magazine ran a front-page article about a gay colonel, the commander of the education corps ordered it shut down. The magazine survived following an appeal to the defense minister. Today, in contrast, the editor of the magazine, Major Yoni Schoenfeld, is an openly gay officer. In addition, in honor of gay pride month in June of last year, the magazine published a series of features on gay officers, including a cover photograph of two male soldiers in an embrace. No negative responses were received, nor were any subscriptions cancelled in response; in fact, the article received many positive responses.²¹⁵ Criticism *was* leveled, however, by IDF Chief Rabbi Brigadier General Avichai Ronski, who wrote to the army’s personnel department and education corps to say he found the topic of homosexuality inappropriate for a magazine whose purpose is to express the IDF way of life.²¹⁶ Both the IDF and the magazine immediately distanced themselves from Ronski’s position. An IDF spokesperson stated, “The IDF assigns soldiers to posts based on military needs and the

soldiers' personal abilities, not based on their sexual orientation or their gender. Any statement to the contrary represents personal opinion and not official IDF policy.”²¹⁷

Bamahane issued an official response saying that its magazine covers- and would continue to cover- the way of life of all IDF soldiers, including gay and lesbian officers; off the record, its staff was more blunt, saying they were simply “unfazed” by the rabbi’s request.²¹⁸

Schoenfeld reports that the difference in reactions across the eight years between the two incidents reflects increased tolerance that was partly a result of the more open policy. He reports that there is negligible friction in the armed forces stemming from the presence of open gays. He said his orientation was known when he served as a combat soldier and commander of a paratrooper company, and that it never became a problem. He described joking around the issue, but said it was generally not hostile. Acceptance of gays is smoother for people who conform to traditional notions proper gender roles, while “those who are more feminine in their speech and appearance have a harder time fitting in.” His overall conclusion was that difference in sexuality is a natural occurrence and that once the presence of gays is allowed and acknowledged, “it’s not a problem anymore.”²¹⁹

In a 2010 article published in *Foreign Policy* magazine, Danny Kaplan, the Israeli psychologist who studies military culture, writes that gay officers have been serving in the Israeli military for 17 years and their country is safer as a result.²²⁰ The example of Israel, Kaplan writes, is particularly instructive as the Pentagon begins to consider the repeal of “don’t ask, don’t tell” in the U.S.

Kaplan begins his article by noting that the experiences of Israel and other countries allowing openly gay service show that the participation of gay soldiers poses no risk to military effectiveness. He further makes the point that, “Policies restricting the participation of gay soldiers paradoxically make sexuality a more salient [and hence disruptive] issue” than when there is no restriction. Many gay soldiers in combat units opt not to reveal their sexual orientation, whether or not restrictions are in place, and those who do often only do so when they are preparing to leave the force. When gay soldiers are allowed to serve but not allowed to identify themselves as gay, anyone can be suspected of being gay, creating a climate of suspicion, paranoia, and harassment, as was seen to be the case in the U.S. military after implementation of “don’t ask, don’t tell.” In contrast, when gay soldiers can serve openly, most do not choose to disclose their sexual identity, and instead find ways to separate their personal and social identities amid an amalgamated military culture, in much the same way as soldiers of different ethnic and religious backgrounds do. “They simply are what they are and find ways to function together,” says Kaplan.²²¹

According to Kaplan, the case of Israel can be instructive for the U.S. in numerous ways. For one, as is already well-established, “the mere participation of gays in combat units of the Israel Defense Forces has had no bearing on military performance and unit cohesion, whether or not soldiers come out.” Secondly, Israel’s experience shows that casting the debate as a dilemma over how to accept “open gays” is misguided. Sexual orientation has not become a source of disruption in the Israeli military because military authorities

have treated it matter-of-factly rather than giving it special attention as a problem needing to be explicitly addressed. The Israeli military has chosen a strategy to “officially acknowledge the full participation of gays and at the same time ignore them as a group that may require special needs.” As a result, gays become integrated into military units by virtue of not being singled out, and all soldiers can focus on their common mission of defeating the enemy rather than on questioning their fellow soldiers. If the U.S. were to chart a similar course, argues Kaplan, “it could enjoy not only a more liberal military, but also, perhaps, a more combat-effective one.”²²²

Conclusion

In comprehensive reviews of published evidence and interviews with all known experts on homosexuality in the IDF, no data emerged to suggest that Israel’s decision to lift its gay ban undermined operational effectiveness, combat readiness, unit cohesion or morale. In this security-conscious country, in which the military is considered essential to the continued existence of the nation, the decision to include sexual minorities has not harmed IDF effectiveness. In addition, while no official statistics are available for harassment rates of sexual minorities in the IDF, scholars, military officials and representatives of gay organizations alike assert that vicious harassment is rare. Despite the fact that the majority of gay combat soldiers do not appear to disclose their sexual orientation to peers, the Israeli experience supports the proposition that American military effectiveness would not decline if known homosexuals were allowed to serve.

Professor Laura Miller of the Rand Corporation has argued that although straight soldiers' reactions to open gays could undermine unit cohesion in the U.S. military, merely lifting the gay ban would not undermine cohesion, morale, readiness or performance.²²³ Miller, whose conclusions are based on interviews she conducted with thousands of American soldiers, reasons that few gays or lesbians would come out of the closet in units where hostility and homophobia prevailed. Rather, Miller believes that American gay and lesbian soldiers would disclose their sexual orientation to peers only when they believed it was safe to do so. In other words, Miller draws a sharp distinction between the effect of the decision to lift a gay ban and the effect of the presence of known gays and lesbians in the military. The Israeli case seems to confirm Miller's distinction.

The Relevance of Studying Foreign Militaries

Those who oppose allowing openly gay service in the U.S. often claim that the U.S. military cannot be compared to foreign armed forces. For instance, Lt. Gen. Calvin Waller, U.S. Army, deputy commander of allied forces in the Persian Gulf War, testified before the Senate in 1993 that “when we allow comparisons of smaller countries to this great nation of ours, the comparison between these countries with their policies regarding known homosexuals serving in their country, it is my belief that we do a grave disservice to our fellow American citizens.”²²⁴ Charles Moskos, a principal architect of “don’t ask, don’t tell,” cautioned that “no neat and tidy lessons can be drawn from one country to another.”²²⁵ Moskos acknowledged that many foreign militaries formally allowed gays to serve, but he disputed their relevance to the U.S., saying other militaries had different cultures or lesser combat obligations or that their practices regarding gay troops were actually less tolerant than their formal policies would suggest. Of the Dutch and Scandinavian militaries, Moskos said, “these aren't real fighting armies like the Brits, the Israelis and us. If a country has a security threat,” he argued, that country would be likely to implement “a policy that makes it very tough for gays.”²²⁶

Critics of gay service continued to dismiss the relevancy claims throughout the 2000s. Lt. Gen. John Lemoyne, former Deputy Chief of Staff of the U.S. Army, said during a 2003 debate over gays in the military that “I do not accept the argument that the studies of foreign militaries are necessarily valid to the U.S. military. Different context. Different roles and missions.”²²⁷ And John Allen Williams, President of the Inter-University

Seminar, commented during a 2005 discussion of “don’t ask, don’t tell” that the “American military tends not to want to learn from other militaries on any subject. It’s just a fact. We see ourselves as *sui generis*.”²²⁸ In short, these opponents claim, because the U.S. military is different, it does not and cannot learn from, or compare itself to, foreign armed forces.

Some take this argument further, mischaracterizing the relevance that the experience of foreign militaries could hold for the debate in the U.S. They suggest that any discussion of foreign militaries is moot because the fact that another country follows a certain policy is not a reason for the U.S to do the same. The implication is that proponents of gay service support repeal only because other nations have done it. This, of course, is not the actual basis of the argument in favor of openly gay service in the U.S. The relevancy claim simply states that the successful transition experiences of foreign militaries which share sufficiently similar variables to the U.S. military suggests that, *if* the U.S. were to lift its ban, American military performance would similarly not decline. The experiences, in other words, lend plausibility to a predictive causal claim—that eliminating “don’t ask, don’t tell” will not harm the military—but they do not, in and of themselves, constitute an argument that the U.S. ought to lift the ban.

The claim that the U.S. military does not, or should not, compare itself to other militaries is important because it has played a prominent role in debates about gays in the military since President Clinton tried to compel the Pentagon to eliminate its gay ban in 1993. As Lawrence J. Korb, Assistant Secretary of Defense under President Reagan, concluded,

“The first thing the military says when the gay issue is brought up... is that the U.S. military is different.”²²⁹ The argument even plays a role in popular discourse when media figures such as Bill O’Reilly echo such sentiments. Responding to research suggesting that foreign militaries have lifted their gay bans without any detriment to their effectiveness, O’Reilly remarked, “But just remember the different cultures in Britain, Israel, Australia, and the United States. Different cultures.”²³⁰

This section addresses the question of how different the U.S. military is from its allied forces, and how relevant the experiences of those forces are to the U.S. It assesses the plausibility of the claim that the U.S. military does not compare itself to or learn from foreign forces. We consider several specific studies that reflect a wide variety of issue-areas, historical periods, and national cultures. All of them show that the U.S. military itself repeatedly has commissioned research that invites such comparisons, at times incorporating the lessons learned from these other militaries. While there is no doubt that the U.S. military is different from other militaries, such distinctions have not prevented the U.S. military from comparing itself to and learning from foreign armed forces. Ironically, one such issue-area in which the Pentagon has drawn lessons from foreign forces is gays in the military, as military spokespersons have argued that the U.S. should not lift its ban because certain foreign militaries have failed to do so.

Use of Other Militaries as Sources of Relevant Information for the U.S. Military

In 1986 the U.S. Army created the Foreign Military Studies Office (FMSO) to “research, write, lecture and publish from unclassified sources, in both English and original languages, about the military establishments, doctrine and operational and tactical practices of selected foreign armed forces.”²³¹ The FMSO, which expanded its work after the fall of the Soviet Union, studies not only technological, strategic, and tactical operations of foreign militaries, but those relating to cultural aspects of service, such as housing, healthcare and personnel policy.²³²

Others have also noted the relevance of foreign militaries. In 1993, Rand thus explained its rationale for studying foreign militaries as part of its assessment of the gay troops issue in the U.S.: “Policy implementation difficulties in other countries can serve as warning flags if the United States attempted similar strategies, and successes in other countries may provide guidelines for U.S. policy formulations.”²³³ As analogues, in other words, these countries’ experiences are not necessarily meant for imitation, but as suggestive models to inform U.S. policy by illustrating the consequences of decisions to eliminate gay bans. Paul Gade, Chief of the Research and Advanced Concepts Office at the U.S. Army Research Institute for the Behavioral and Social Sciences, agreed in remarks made in 2000, arguing that foreign militaries “are the best analogues we have for the U.S. case.”²³⁴

Indeed, for decades the U.S. military has explicitly compared itself to foreign militaries in the area of personnel policy including, ironically, comparisons to foreign armed forces that ban gays and lesbians. Indeed, prominent observers have drawn on the experiences of foreign armed forces that prevent homosexuals from serving openly to justify their opposition to integration in the U.S. Lt. Gen. Waller, for example, cited Korea and its policy of “no toleration of known homosexuals in their ranks” during his 1993 Senate testimony, and concluded surprisingly (given his argument, mentioned above, about the irrelevance of foreign military forces) by invoking a comparison to other countries that maintain gay bans: “And finally in all my dealing with the many nations who provided military forces to Operations Desert Shield and Desert Storm,” he said, “the vast majority of those nations, as you have heard here today, did not allow known homosexuals to serve in their military units, who were part of the Persian Gulf forces.”²³⁵

In making her case for banning gays from the U.S. military, Major Melissa Wells-Petry, who consulted the 1993 Military Working Group that wrote the blueprint for the current “don’t ask, don’t tell” policy, argued that U.S. personnel policies should be sensitive to the cultural attitudes of countries in which we deploy troops. “The way in which a host nation views the United States Armed Forces is critical indeed,” she wrote.²³⁶ She cited the British ban on gay service personnel, which was in effect when she was writing, as part of her case for banning gays in the U.S. military, using their rationale that, because gays are likely to be targeted for blackmail, they are unsuitable to serve in the U.S. military. Drawing an analogy between the U.S. and Britain and France, she wrote that “A relationship between blackmail and homosexuality is acknowledged in other national

cultures as well.”²³⁷ Col. Ronald Ray of the U.S. Marine Corps relied on similar logic when he argued for maintaining the ban, and referred to the British ban on homosexual service members to support his argument. He cited a British military expert who argued that “homosexuality in [a British army] regiment would be ‘devastating to unit cohesion.’”²³⁸

These arguments date from before Britain lifted its ban. Clearly, opponents of allowing gays and lesbians to serve openly in the U.S. military do learn lessons from foreign armed forces, including on the subject of service by gays and lesbians. To the extent that the U.S. military does tend to learn from foreign forces, the British armed forces often serve as the most relevant comparison case.²³⁹ The comparison of the U.S. to British forces during the period when the latter banned gay service raises the concern that opponents of gay service only invoke other nations when it supports their position, but cry foul when doing so undercuts their position.

Following are case studies of specific instances in which the U.S. military draws lessons from foreign militaries.

Military Innovation and Diffusion in Theory: Drawing lessons from other militaries has been the norm rather than the exception throughout much of modern history. In the context of emerging nationalism in Europe in the eighteenth and nineteenth centuries, for example, competition among nations for security led countries to focus on the military capabilities of their rivals and imitate those aspects that they deemed necessary for

survival. Such developments prompt Barry Posen to argue that “states will be concerned about the size and effectiveness of their military organizations relative to their neighbors. As in any competitive system, successful practices will be imitated. Those who fail to imitate are unlikely to survive.”²⁴⁰ For those nations that aspire to greater political power and influence, looking to the most successful rival country with the strongest military has been a common strategy, resulting in “contending states [imitating] the military innovations contrived by the country of greatest capability and ingenuity.”²⁴¹ An example of this process is Prussia’s transformation of its military during the mid-seventeenth and early eighteenth centuries, during which time Prussian officials studied France as a successful military model. As Posen describes, “Innovations that produce vast increases in the combat power of the French Army, both of a narrow tactical nature and of a more diffuse political nature, [were] closely studied by Prussian professionals. Imitation [was] recommended, and to a considerable extent achieved, including political reforms.”²⁴² As this example illustrates, throughout history, militaries, even those that are extremely different, have looked to each other for ways to improve themselves. As he explores “whether states consciously imitate the successful practice of others,” Posen concludes that “states might argue their own national uniqueness and the complete ‘non-importability’ of foreign models, but instead imitate the military institutions and practices of those who have defeated them, repackaged with a veneer of indigenoussness.”²⁴³ Thus, it has not been uncommon for militaries to incorporate the practices of other militaries while at the same time denying the source of such innovations.

As powerful as Posen's model of competition and imitation may be for explaining how militaries have evolved over time and explicitly imitated each other, it fails to account fully for the complicated and culturally inflected process of innovation and diffusion that militaries actually experience. Challenging Kenneth Waltz's argument that "diffusion is a uniform and efficient process driven by the threat of defeat by a superior power," Leslie Eliason and Emily Goldman argue that a "look at the historical record reveals far more variation in adoption and emulation across states and cultures than conventional international relations theory assumes. The process of diffusion appears far less deterministic and much more vulnerable to local conditions than the systemic view suggests."²⁴⁴ Emphasizing the "contingent nature of the diffusion process," Eliason and Goldman urge scholars to explore more fully the cultural or organizational context within which new technologies or practices are considered and adopted.²⁴⁵

Three of the most relevant themes that emerge from their overview reveal how attending to such "local conditions" subverts our understanding that the diffusion of military innovation proceeds solely from major to minor powers. Even when smaller militaries on the periphery adopt core military technology, as was the case in the Middle East during much of the Cold War, Eliason and Goldman note that "indigenous culture shapes diffusion," reinforcing the idea that some level of adaptation and adjustment occurs any time one military imitates another.²⁴⁶ They also observe that "cultural affinity allows transmission of military expertise far exceeding identifiable security requirements," as is the case between the U.S., the U.K., Canada, Australia, and New Zealand, their common cultural and linguistic background effectively facilitating a range of innovations.²⁴⁷ Last,

they emphasize that “innovation can also originate in the periphery,” as was the case when the U.S. adopted Israeli-designed remotely piloted vehicles, discussed below.²⁴⁸ Ultimately, these insights reflect a consensus that military innovation moves in many directions, suggesting that major powers like the U.S. do not simply innovate and get imitated, but rather they are engaged in a more complicated process in which they carefully consider the experience of smaller, less powerful militaries and even learn important lessons from them.

In his examination of the unique relationship between the ABCA countries, which include Australia, Britain, Canada, the United States, and New Zealand, Thomas-Durell Young considers how cultural similarities between these countries influence patterns of innovation. He notes that, “despite the end of the Cold War, and the end of a common threat, [the] relationship among these five countries has actually grown closer, particularly among the five armies.”²⁴⁹ This is not to say that important differences between these militaries do not continue to exist and pose challenges to the interoperability that they aspire to. But as Young makes clear, the militaries of all these countries, including the U.S., share a common cultural heritage and political history. Such similarities have helped create a context in which they desire and are able to share information effectively among each other. The four case studies presented below indicate that across a wide range of issue areas and historical periods the U.S. military has compared itself to and learned from foreign militaries. Indeed, the American armed forces have even learned from the militaries of nations that do not share close cultural affinity with the U.S.

Technological Innovation: While many armed forces have adopted U.S. technological innovations and advances, the U.S. has learned from foreign militaries as well. As Timothy D. Hoyt argues, “The peripheral experience demonstrates that not all diffusion flows from the industrialized core to the developing periphery.”²⁵⁰ Israel’s political relationship with the U.S., for example, as well as its recent history of military engagement, has allowed it to serve as a useful example for the U.S. military. From 1956 to 1973, the Israeli Navy developed a series of fast missile-armed attack craft (FACMs), in response to technology that Arab navies had adapted from the Soviet Union. These “indigenously developed and produced antiship missiles” were the “first deployed by a Western power.”²⁵¹ As Hoyt notes, these innovations “proved decisive in the 1973 conflict” between Israel and Arab states, and the “antiship missile currently constitutes one of the most important weapons in naval arsenals,” including that of the United States.²⁵² Unlike the traditional neorealist view that sees only minor powers imitating major powers, this example illustrates an alternative route of diffusion, for “Israeli innovation spurred countermeasures in the core countries.”²⁵³ And after Israel showed the effectiveness of these new weapons in 1973, countries like the U.S. responded with their own similar innovations. Because the “use of sea-skimming missiles, in particular, posed a particular threat,” it “prompt[ed] the development of automated point defense systems such as PHALANX (United States) and NULKA (Russia).”²⁵⁴

In the 1980s, the U.S. more directly adopted another facet of Israeli military technology: remotely piloted vehicles (RPVs) and unmanned aerial vehicles (UAVs). According to

Hoyt, Israel's 1982 war in Lebanon confirmed the utility and effectiveness of such devices, which "provid[ed] near-real time battlefield and operational intelligence."²⁵⁵ Both the U.S. and Israel had been experimenting with such technology since at least 1973, but a private firm in Israel succeeding in perfecting RPVs before the U.S. managed to. As Hoyt writes, at this time the "United States looked on RPV technology as an area of considerable promise. Nevertheless, U.S. RPV projects were languishing by 1982: out of 986 RPVs built in the 1960s and 1970s, only 33 remained in U.S. inventory and all those were in storage."²⁵⁶ For the U.S., part of Israel's success was reflected in its ability to develop RPVs much more cheaply and efficiently than it had attempted to do, and lead to its adoption of the technology in the U.S. military. According to Hoyt, "within several years after the Lebanon conflict, the United States was purchasing and fielding Israeli-designed RPVs and was involved in joint efforts to develop new systems and integrate existing systems into ground, naval, and amphibious units of the U.S. military."²⁵⁷ Directly adopting models like the Mazlat Pioneer and developing new RPVs, like the Hunter drone, from existing Israeli technology, the U.S. military eagerly embraced another country's technological innovation, which clearly demonstrates not only the relevance, but also the utility of looking to a foreign military.²⁵⁸

Clearly, it is not simply the case that the U.S. only shares its advances with the smaller militaries of its allies. Even with its highly advanced technology, it still pays close attention to the other countries, allowing their capabilities to inform their own decisions about military tactics and procedures. According to Young, "the U.S. armed forces are not unaware of this important problem [allies' concern with U.S. advances] and are

endeavoring to maintain their ability to operate alongside forces that are less technically advanced—both allies and their own reserve components.”²⁵⁹ Although not the typical kinds of lessons we might expect our military to learn from others, such considerations underscore the relevance of foreign militaries for the U.S., especially since the end of the Cold War when the U.S. has found itself working increasingly more closely in multinational engagements.²⁶⁰ Thus, the U.S. military strives to create and maintain “intellectual interoperability” with these allies through the “standardization of tactics, techniques, and procedures,” further underscoring the relevance of their experiences.²⁶¹

Privatization: In recent years, the U.S. military and government have attempted to privatize various aspects of military operations, and in the cases of military housing and ammunitions production, the U.S. military has looked to both Britain and Canada for ideas on how to implement change.²⁶² In April 2000, the Assistant Secretary of the Army for Installations and Environment “convened a conference to compare the United States and United Kingdom experiences with privatizing military installation assets, operations, and services.”²⁶³ Held in the U.K., the “purpose of the conference was to bring together U.S. and U.K. defense officials, U.S. Army leaders, and commercial contractors from both countries to discuss the British experience with privatization and explore its applicability to the U.S. Army”²⁶⁴ Co-chairs of the conference were the Hon. Dick Cheney, former U.S. Secretary of Defense, and Field Marshall The Lord Vincent, former Chief of Defence Staff for the U.K. Ministry of Defence. As the conference organizers acknowledged, both countries and their militaries have turned increasingly to the private sector since the 1980s, but “the U.K. has pursued privatization of defense activities and

support services much more aggressively than the U.S.”²⁶⁵ Because of this, U.S. officials repeatedly looked to their British counterparts throughout the conference for advice and suggestions on possible ways to improve their efforts at privatizing certain military services. In his opening remarks, U.S. Co-Chairman, Cheney observed, “My general impression is that... our British colleagues are far ahead of us in the U.S. in the extent to which they have adopted changes in culture, attitude, and style of operation that are required for privatization efforts.”²⁶⁶ As much as he recognized the political differences between the countries that could prevent the U.S. from imitating exactly measures taken by the U.K, Cheney urged his U.S. colleagues to listen closely to their British counterparts, for this conference allowed them a “tremendous opportunity for us to share experiences, and to learn how the U.S. might take advantage of the concepts and principles that are embodied in the U.K. experience.”²⁶⁷

The Honorable Mahlon Apgar IV, then Assistant Secretary of the Army for Installations and Environment, appeared equally optimistic that the U.S. could learn from the British model. Acknowledging their common experiences, Apgar notes that the “U.S. Department of Defense, or DOD, and the U.K. Ministry of Defence, or MOD, have faced similar challenges in recent years,” including significant downsizing and restructuring and modernizing military forces.²⁶⁸ As eager as he was to learn from the U.K., Apgar emphasized the important differences between the countries, most pressing being the different nature of each country’s government and the different levels of power over the military that is granted to the British Parliament and the U.S. Congress. But in spite of such differences, his interest in privatization clearly outweighed these differences.

According to Apgar, “We face enormous obstacles to privatization in the U.S., and I’ve been intrigued to learn that our British colleagues have not found it much easier.

Fortunately, you in Britain have had far more recent success in this area than we have, and you have already tackled many of the difficulties we are just now addressing. In this conference, we hope that we can learn from your experience and that you’ll help us leapfrog some of the barriers that we face.”²⁶⁹

Overall, the general tone of Apgar’s keynote address reflected a hopeful certainty that possible answers to the U.S.’s challenges would emerge from the conference discussions. Concluding his talk, Apgar emphasized that one of the most important lessons that U.S. could learn from the U.K. involves an attention to their process of transition and transformation. As he said, reflecting on the U.K.’s system of change, “We in the U.S. could save years by adopting [their] model.”²⁷⁰

After these opening remarks, conference attendees participated in working groups that allowed them to share information and ask questions of each other’s experiences. Repeatedly, these groups reflected an interest on the part of the U.S. participants to glean applicable lessons for their efforts to privatize military housing and base operations. In the Housing Working Group, participants agreed that the “U.S. and the U.K. share some basic military housing problems.”²⁷¹ And even though a “stark difference in attitude” regarding definitions of privatization “informed much of the group’s discussion about the merits of transferring ownership and management of residential housing facilities,” U.S. Army groups members continued to solicit advice from the U.K., resulting in “industry

and U.K. group members offer[ing] concrete advice about building contracts with incentives that reach all the way through the lease.”²⁷² Thus, the differences between the two countries did not prohibit U.S. group members from drawing possible lessons from the British and applying their experiences were they deemed it appropriate. Together the participants in this working group concluded that “successfully privatizing military housing requires changing cultural attitudes. Improving education for all players—public and private sector—is essential to effect that change.”²⁷³ Such exchanges and conclusions were common for all the working groups of this conference, and the dialogue between the representatives of each country was so fruitful that it prompted the U.S. Army participants to “establish a permanent, ongoing forum, such as this Conference, for continued U.S.-U.K. exchanges. The forum should meet at least annually, and organize visits to installations in the U.K. and U.S. where public-private partnerships are in force.”²⁷⁴ As the U.S. continues to pursue its privatization of these parts of its military, the relevance of the British experience is, according to the U.S. military, undeniable.

Such relevance has even more recently extended to include Canada’s experience with privatizing ammunitions production. In 2004, the National Defense Research Institute published a report on Canada’s privatization of its “domestic ammunition-manufacturing base” that “was done at the request of the U.S. DOD to determine what lessons, if any, the Canadian experience might offer should the U.S. Army consider privatizing its government-owned plants.”²⁷⁵ Even though the study authors recognize that “Canada differs from the United States along many dimensions,” including the size of its military, its focus and commitments, and differences in political structure and internal divisions of

power, they concluded that such differences should not “render the Canadian example moot.”²⁷⁶ In fact, their research prompts them to argue that not only could the “deliberate process Canada employed... also work in the United States,” but also that the “Canadian experience offers numerous useful insights into the privatization process. If the United States decides to pursue a similar course, it would do well to study the Canadian experience in detail.”²⁷⁷ In the summary of their report, the study authors list no fewer than twelve points that offer insight from the Canadian experience, insights that emphasize the process that Canada followed to achieve successful privatization. As was the case in the privatization conference, the lessons learned from foreign militaries have less to do with what the U.S. military should do, but how it should proceed once it has concluded that a particular innovation or change is a productive course to take. Regardless of the U.S. military’s ultimate decision with regard to this report, it is not unreasonable to conclude that Canada’s experience will at least be considered as the U.S. military decides its future course with regard to this issue.

Counterterrorist Strategy: More recently the war in Iraq and the ongoing insurgency has provided the U.S. Military an opportunity to learn tactical lessons from the Israel Defense Forces and improve its fight against terrorism, especially with regard to urban warfare. According to the Jewish Institute for National Security Affairs, “Army and Marine Corps forces that battled terrorist insurgents in the Iraqi cities of Fallujah and Mosul employed urban warfare tactics gleaned from the combat experience of the Israel Defense Forces.”²⁷⁸ These lessons were learned at Israel’s Adam counter insurgency urban warfare training facility, at which “in the last two years, hundreds of U.S. military

personnel have trained.”²⁷⁹ The lessons learned that U.S. forces have adopted include maintaining surprise when infantry “advance in an Arab urban environment,” using air platforms to “target enemy combatants during street battles,” and using a “multi-pronged advance on insurgency strongholds in an urban area.”²⁸⁰ As a military official told reporters, “We have learned a lot regarding urban warfare tactics in the Middle East from our allies... Yes, this includes Israel.”²⁸¹ In a letter to *Army Magazine*, Brig. Gen. Michael Vane, Deputy Chief of Staff at the U.S. Army’s Training and Doctrine Command (TRADOC) concurred. Responding to an earlier article about urban warfare, Vane elaborated on the development of recent Army doctrine in this area, stressing the importance of considering the IDF’s experiences. “Experience continues to teach us many lessons,” he writes, “and we continue to evaluate and address those lessons, embedding and incorporating them appropriately into our concepts, doctrine and training. For example, we recently traveled to Israel to glean lessons learned from their counterterrorist operations in urban areas. To a degree, we are already executing in Basra and Baghdad the information age sieges that Col. Leonhard describes.”²⁸²

Subsequently, on December 6, 2004, the Department of Defense “chartered a blue-ribbon panel to explore ways to improve the military defenses against urban guerrilla attacks such as the ones occurring daily in Iraq.”²⁸³ The director of defense research and engineering, Ronald Sega “directed the task force to draw on lessons that other nations have learned in adapting their traditional military forces to deal with asymmetrical threats, including Britain’s experience in Northern Ireland, Israel’s with the Palestinians, Russia’s with Chechnya and Australia’s with East Timor.”²⁸⁴ As all of these examples

show, at many levels, the U.S. military recognizes that valuable lessons can be drawn from other countries experiences, especially as the U.S. enters into a new type of strategic and tactical environment, with which the military has less experience than some U.S. allies.

Medical and Sanitary Policy: The U.S. military’s tradition of learning from foreign militaries is not new. In the nineteenth and early twentieth centuries, for example, the U.S. searched for ways to improve the care of wounded soldiers. In 1862, with the U.S. in the midst of its bloody civil war, Stephen H. Perkins traveled to Europe to survey the pension and care systems for disabled soldiers of the continent’s major powers, including France, Prussia, Austria, Russia, and Italy. Under the direction of the U.S. Sanitary Commission, Perkins was instructed to “study the military pension and invalid systems of the principal European nations... and to report his observations to the Commission,” with the hope that his evaluation of these countries’ systems would guide U.S. policy on this matter.²⁸⁵ As Henry W. Bellows, the President of the Sanitary Commission, makes clear in his letter of instruction included in the final report, addressing this issue was of the utmost importance, considering the extraordinary number of men—Bellows cites nearly 200,000—whose lives were devastated by the war and the U.S.’s limited experience in dealing with such matters. As he writes, “the subject will need careful guidance,” and “the principle sources of light are, first, general principles, and next, the experience of other nations—for we have next to none in our own country.”²⁸⁶

During World War I, the U.S. again turned to a European power, this time Germany, to improve its military medical care. Prior to the U.S. entry into the war, Dr. John R. McDill, an officer in the Medical Reserve Corps of the U.S. Army, temporarily resigned his commission in the Medical Reserve Corps of the U.S. Army to direct a hospital service unit organized by the American Physicians' Expeditions Committee of New York. In his capacity as a medical relief worker, McDill was able to gain access to a number of German army sanitary organizations and collect data for his medical war manual, *Lessons from Enemy: How German Cares for Her War Disabled* (1918), a volume that was authorized by the U.S. Secretary of War and supervised by the Surgeon-General and the Council of National Defense. Impressed with the organizational efficiency of the German military medical system, McDill hoped that his account "might furnish something of use to our service."²⁸⁷ Because "the Germans claim that through their system they have been enabled to return 95% of their wounded to either military duty or to a self-supporting civic or industrial usefulness," McDill believed that the U.S. and its allies should learn from Germany's experiences.²⁸⁸ Although he was aware of the dissimilarities between the two countries, McDill concluded by emphasizing the larger good that could come of learning lessons from the enemy: "Aside from the question of the irreconcilable differences between autocracy and democracy, if we will look back of the phenomenon of the tremendous power of Germany we can see the great fact of community life organized for health for both peace and for war. If we overlook this and fail to learn this great lesson from the enemy... we will have missed one of the most valuable lessons of the great conflict."²⁸⁹

Fielding Other Claims of Irrelevancy

In a related effort to dismiss the relevance of foreign militaries to the U.S., some opponents of openly gay service claim that even when formal policies allow open gays to serve, such service is rarely or never actually open. Charles Moskos told Congress that gay troops in the Israeli military did not fight in elite combat units, did not serve in intelligence units or hold command positions, and did not serve openly in high positions. “I can categorically state that no declared gay holds a command position in a combat arm anywhere in the IDF,” he stated. Open gays, he said, “are treated much in the manner of women soldiers,” in that they are excluded from real fighting and serve primarily in support roles from “open bases” where they can go home at night.²⁹⁰ He repeated these assertions in a companion essay and op-ed,²⁹¹ and in radio broadcasts as late as 2000, saying there were no open gays in combat or intelligence positions in the Israeli military.²⁹²

But according to Dr. Reuven Gal, former chief psychologist for the IDF and later director of the Israeli Institute for Military Studies, even before Israel liberalized its policy in 1993, gay soldiers in the IDF did serve in “highly classified intelligence units” and, even when their sexuality was revealed to their commanders, they were allowed to keep serving.²⁹³

The Palm Center’s study on the IDF found repeated instances of openly gay service in combat and intelligence positions, while noting that cultural norms continue to encourage

most gays and lesbians to keep their sexual orientation private. According to Palm, “some IDF combat and intelligence units have developed a reputation as particularly welcoming to gay and lesbian soldiers and some have developed a gay culture.” One tank corps soldier said his base had “a large gay contingent” and that it was sometimes “even easier” to come out of the closet in the military “because you are protected from society. You don’t have friends from the same town so you can be more open in the Army.” The Palm study also reported interviewing over 20 gay IDF soldiers who served in combat units, several of whom said they were known by others in their combat unit.²⁹⁴ A related study, published in 2003 in *Parameters*, the professional journal of the U.S. Army War College, found that at least one fifth of IDF combat soldiers knew of a gay peer in their unit, with roughly another fifth saying they “might” have known a gay peer. This suggests that hundreds of Israeli service members were serving openly.²⁹⁵

The Palm study concluded that the Israeli case is, indeed, relevant to the situation in the U.S., even though many Israelis choose to keep their sexual identity private. In fact, such voluntary discretion is a reminder that lifting a ban on openly gay service is not likely to result in a mass coming-out or in any notable change in the core culture of the military apart from enhancing respect for those who serve. “The fact that many gay Israeli soldiers choose not to reveal their orientation does not indicate that the Israeli experience is irrelevant for determining what would happen if the U.S. lifted its gay ban,” concluded the Palm study. “On the contrary, the evidence shows that both Israelis and Americans come out of the closet only when it is safe to do so.” The 2003 article in *Parameters* discussed the oft-cited fear among ban defenders that ending discrimination would result

in a mass coming out in the military, suggesting the fear was not based in fact. “This belief is premised on the flawed assumption that culture and identity politics are the driving forces behind gay soldiers’ decisions to disclose their homosexuality,” says the article. “What the evidence shows is that personal safety plays a much more powerful role than culture in the decision of whether or not to reveal sexual orientation.”²⁹⁶ Thus the fact that many or most troops remain discreet even when a new policy allows them to serve openly is an argument for lifting the ban, not against it: it suggests that formally ending a ban will not create disruptions to a fighting force, while other evidence suggests that allowing gays to serve honestly improves their readiness and morale.

Critics of openly gay service have also suggested that foreign militaries are irrelevant to the U.S. because their cultures are more tolerant of homosexuality than American culture. Yet this assertion is not borne out by evidence. In Britain, a law was passed in 1987 banning any discussion in schools that promoted the acceptability of homosexuality. Even in the 1990s, a majority of the British, according to polls, believed sex between members of the same sex was always wrong.²⁹⁷ In Canada, in the years preceding the admission of open gays, polls showed strong moral disapproval of homosexuality.²⁹⁸ Military researchers at the U.S. Army Research Institute for the Behavioral and Social Sciences regard the Anglo-American nations (the U.K., Canada, Australia, New Zealand and Ireland), as sharing “a more-or-less common cultural heritage” with the U.S. The researchers pointed to a 1992 study in Germany that found that respondents viewed homosexuals as less acceptable neighbors than foreigners, Hindus, racial minorities and Jews, and equated gays and lesbians with criminals, AIDS patients and the mentally

handicapped. According to military sociologists, France tolerated “deviant behavior” because, as a Catholic country, the possibility of forgiveness for sin was always available. Data also suggest that Israel was slightly more homophobic than the U.S. in the 1990s.²⁹⁹

Evidence of Successful Combat and Joint Operations Involving Openly Gay Troops

While some of the skepticism of the relevance of foreign militaries was expressed before 2001, the international landscape following the Al Qaeda attacks of that year has dramatically changed the analytical context for assessing claims of irrelevancy. The wars in Afghanistan and Iraq have thrown into combat the militaries of numerous countries that American commentators formerly dismissed as non-combat forces. Indeed, in many documented cases, U.S. troops have served in these military campaigns shoulder-to-shoulder with troops who belong to militaries that allow openly gay service. These facts have considerably weakened claims from before 2001 that those nations with openly gay troops cannot offer combat experiences that are relevant to the major combat operations of the U.S. around the world.

In the first five years of military operations in Iraq, the U.K. sent a total of forty-five thousand troops to Iraq, mostly stationed in the south.³⁰⁰ Thirty other countries also joined the coalition, many of which allowed open gay service. The coalition included two thousand troops provided by Australia, along with submarines and other naval support from Denmark.³⁰¹ In Afghanistan, the number of countries contributing troops or

support was even higher, numbering nearly fifty at one time. As NATO forces took over the occupation, troops from these countries took on greater combat roles.

In 2006, American, Canadian, British and Afghan troops led the charge against a resurgent Taliban in Operation Mountain Thrust, the largest offensive to root out Islamic radicals since 2001. Insufficient water meant some troops had to give each other IVs to survive. Enduring heavy mortar attacks, suicide bombings, regular ambushes, and scorching desert temperatures, over ten thousand troops worked together to lug more than seven thousand pounds of supplies from the bottom of a rocky mountain range to its peak, where they had their greatest chance to best the Taliban. The powerful artillery and targeted airstrikes of the coalition took its toll on enemy forces, and by the end of the offensive, over 1,500 Taliban fighters had been killed or captured.³⁰²

Afterward, a NATO International Security Assistance Force, consisting of troops from nearly forty countries, took over operations in some of the most dangerous regions of southern Afghanistan, with Britain, Australia, Canada, Denmark and the Netherlands doing the heavy lifting.³⁰³ That fall, Canadian forces led American, British, Dutch and Danish troops in a bloody battle in which five hundred suspected Taliban fighters were surrounded and killed. The defeat prompted complaints by the Taliban that so many of its forces had been wiped out that it was having trouble finding sufficient leadership.³⁰⁴

The Canadian and Australian experiences with open gays was now fourteen years old but Canada, Australia, and even the Netherlands, were certainly not “irrelevant.” Their

combat-tested fighting forces, replete with gays and lesbians serving openly, were critical partners in America's national defense strategy, and the U.S. was eager to enlist their fire power in the wars in the Middle East. Charles Moskos had given his original testimony about the limited relevance of Britain seven years before it lifted its ban in 2000. Late the following year, in 2001, its armed forces became the chief partner to the U.S. in the war in Afghanistan and, in 2003, in Iraq. It thus became far less tenable to claim that other militaries were "not real fighting armies." Many had not seen major combat in 1993, but by 2006, even the smallest of these militaries were proving themselves in combat so much so that the U.S. was reliant on their firepower and the U.S. president, George Bush, was touting their capacities as "the coalition of the willing."

Many of these military operations were not only reliant on the presence of smaller forces that allow openly gay service, but were fought together with those forces. The presence of openly gay service members in multinational military units offers first-hand evidence that serving with known gays does not undermine effectiveness.

Since the end of the Cold War, multinational forces have mushroomed. The U.S. has participated in at least forty joint military operations, with half involving direct deployment with foreign service members. Many of these participating countries allow open gay service, from Canada to Britain and beyond.³⁰⁵

British Lieutenant Rolf Kurth of the Royal Navy was one example. Discharged from the Royal Navy in 1997 for homosexuality, he was invited to re-enlist after the U.K. lifted its

ban in 2000. During the War in Iraq, Kurth was deployed to the Persian Gulf aboard the Royal Navy's largest amphibious ship. As it happened, American sailors also served on his ship, and Kurth worked closely with them, serving as a principle liaison for the American team. Kurth served as an openly gay man in this multi-national force, and said it was "fairly well-known around the entire ship" that he was gay. His sexual orientation was "common knowledge," a fact he confirmed by the banter of his colleagues, who playfully told him, when several men convened to discuss an attractive woman, that Kurth was clearly "not the best person to judge!" He characterized his relationship with the American sailors as "great," saying he "got along very well with them." He added that the Americans "didn't behave any differently from British colleagues" toward him, even though he was known as a gay sailor.³⁰⁶

Lieutenant Kurth's service in a multinational force in the Iraq War is only one example of documented evidence that openly gay foreign troops are actually serving right alongside Americans—without causing the kinds of disruptions that critics predicted would result from gay service. Others come from training operations on foreign ships deployed in the Middle East, NATO and UN peacekeeping missions around the world, joint operations at the North American Aerospace Defense Command in Canada and the U.S., the Multinational Force and Observers in Sinai, the Multinational Force in Lebanon, U.S. and foreign war colleges, training grounds and military and diplomatic centers of operations, including NATO headquarters in Belgium. In some cases, U.S. troops are directly under the command of foreign military personnel, some known to be gay. And these cases

suggest that coming out of the closet can help improve the working climate in the armed forces.

In one example, Colonel René Holtel of the Royal Netherlands Army commanded American service members, including a U.S. tank battalion, in NATO and UN missions. In 2001, he served as chief military observer and chief liaison officer at the headquarters of the United Nations Mission in Ethiopia and Eritrea. UNMEE was tasked with monitoring the ceasefire between the two nations in the demilitarized security zone running along their mutual border. Six American service members served with him as military observers. Holtel found that when others in his unit knew he was gay, it caused “some relaxation in the unit,” reducing the guesswork and allowing people to focus on their jobs. “They are not having questions anymore about who or what their commander is,” he said. By telling them who you are, “you pose a clear guideline and that is, ‘don’t fuck around with gays, because I’m not going to accept that.’”³⁰⁷

The use of multinational forces is also a reminder that armed services worldwide are trending toward what experts call “the postmodern military.” In an age of terrorist threats, where “rogue” attacks are more likely than traditional acts of war, the term refers to the blurring of several kinds of boundaries, including national borders, as well as fading distinctions between the different branches of the military and even between the military and civilian society.³⁰⁸ Nothing has demonstrated this evolution more grimly than the Iraq War. Rocket-propelled grenades, snipers and suicide bombers do not distinguish between civilians and designated fighters, between combat Marines and

female supply clerks riding in the rear of a convoy, between uniformed military personnel and field intelligence agents. As it becomes harder and harder to tell who is a civilian and who is a combatant, and to distinguish which jobs fall into the intelligence sphere and which are uniformed, it becomes less and less rational to maintain a policy that draws lines around groups that simply don't exist in the same ways as they did in the past. This is a fact about not only the postmodern military but the postmodern world—it's hard to contain people and restrict behavior by resorting to familiar lines of exclusion when these old categories have a totally different meaning, or none at all.

Conclusion

The U.S. has long studied other militaries to learn relevant lessons for its own military, including about the topic of homosexuality in the force. Government, military, and academic leaders are quite capable of using sound social science techniques to assess the relevancy of different lessons to the context at hand, making the suggestion that other nations have nothing to offer the U.S. in studying gays in the military seem naïve at best, and dishonest at worst.

Opponents of gays in the military have routinely exaggerated the arguments for studying the experiences of foreign countries, implying that supporters of open service who point to other militaries are asking the U.S. to blindly follow those policies and lift the gay ban simply *because* foreign militaries have done so. In fact, however, the principle claim of

supporters of learning from foreign militaries is that, while no single case is decisive, the combined weight of the evidence from the 25 countries which allow gays and lesbians to serve shows that if the U.S. were to lift its ban, American military performance would not decline. According to this perspective, the relevance of foreign experiences is not that they indicate that the U.S. should eliminate “don’t ask, don’t tell,” but rather that they illustrate that if the U.S. does decide to integrate, military performance will not decline.

Those who support eliminating “don’t ask, don’t tell” acknowledge that important differences distinguish the U.S. military from other armed forces, but suggest that the relevant question is not whether differences exist, but whether they render foreign military experiences irrelevant for determining whether military effectiveness would decline if gays and lesbians were allowed to serve openly in the U.S. Indeed, scholars have already explained why such differences do not diminish the relevance of these lessons, but opponents of gays in the military have not responded.³⁰⁹ Rather, they robotically repeat the point that the U.S. military cannot be compared to or learn from the experiences of other militaries. In short, although the U.S. has more international obligations than other countries and its culture is unique, the question is not how similar our missions or culture are to those of other nations but whether the United States is any less capable than other nations of integrating gays into its military.

Conclusion

The experiences of foreign nations with openly gay service offer highly instructive lessons into nearly all the issues that the U.S. faces as it considers lifting its current ban on known gay and lesbian troops. While many consider the U.S. and its military to be unique among world fighting forces, and while each culture is distinct in important ways, scholars and the U.S. military itself view foreign militaries as valuable sources of information about warfare and military policy, including on the topic of openly gay service. Other countries, particularly Britain, Canada, and Israel, experienced very similar cultural and political debates on this issue prior to lifting their bans. Opponents raised concerns that an inclusive policy would undermine morale, recruitment, retention, cohesion and discipline, and pointed to polls suggesting that service members would leave if bans were lifted. Yet the reality was far different from the scenario painted by opponents, and consistent research by those militaries, as well as by independent scholars and observers, found that the new policies were uniformly successful, and in many cases improved the climate in their armed forces.

The research is also clear on what made these transitions successful: clear signals of leadership support from the top levels of the military; a focus on a uniform code of behavior to which all service members are subject, without regard to sexual orientation; and a quick, simple implementation process that does not retard the transition. This latter is deemed critical to avoid anxiety, confusion, and obstructionism both by military

members and political forces outside the military. These three lessons are mutually reinforcing, as strong leadership, consistent standards, and decisive execution of policies combine to make expectations clear and to communicate them effectively throughout the chain of command.

The research on the importance of decisive implementation is borne out by the experiences of foreign militaries, which generally followed civilian mandates to lift their bans and completed the transition process in under six months. In nearly all cases, these militaries replaced their gay bans with codes of conduct that did not discriminate based on sexual orientation, and helped shift focus from group traits which have been shown to be irrelevant to performance, to behavior and capacity that are performance-related.

In no case did a formal change in policy result in a mass “coming out.” Yet, contrary to some assertions, gay and lesbian troops do serve in all levels of the armed forces of Britain, Canada, Australia, and Israel, in both combat and non-combat positions, at both the enlisted level and as high commanders. While gays and lesbians continue to face pockets of discrimination in these militaries, the new policies contribute to a decrease in such discrimination, by allowing knowledge and familiarity to replace fear with facts. There were no instances of increased harassment by gay people as a result of lifting bans in any of the countries studied.

Each country has taken its own approach to resolving questions of benefits, housing, partner recognition, re-instatement, etc. Generally, the military honors the status afforded

to gay or lesbian couples by that country, and the military rarely gets out in front of the government or other institutions in the benefits offered; in some cases the military has joined other institutions in outreach to gay and lesbian populations to convey that it is now a welcoming employer of all people.

Finally, none of the countries studied saw fit to install separate facilities of any kind for gay and heterosexual troops, or to retain any regulations or procedures that would continue to treat gays differently from their straight peers. While episodes of informal discrimination in treatment and promotions have not been wiped out, evidence suggests that formal policies of equal treatment for people equally situated helps reduce discrimination and resentment, and helps keep the focus on behavior necessary to complete the mission rather than on group traits that can distract from the mission.

Appendix

List of Foreign Militaries that Allow Openly Gay Service

Note: Several countries, particularly in Asia, are difficult to codify since they do not have a formal policy governing gay service, often not acknowledging their existence at all. We have taken a conservative approach to listing nations that allow openly gay service, including only those nations that we could confirm allow openly gay service without formal restrictions. For this reason, our list may be smaller than others.

1. Australia
2. Austria
3. Belgium
4. Canada
5. Czech Republic
6. Denmark
7. Estonia
8. Finland
9. France
10. Germany
11. Ireland
12. Israel
13. Italy
14. Lithuania
15. Luxembourg
16. Netherlands
17. New Zealand
18. Norway
19. Slovenia
20. South Africa
21. Spain
22. Sweden
23. Switzerland
24. United Kingdom
25. Uruguay

Documentation on Contested Cases

Czech Republic: Homosexuality is not considered a liability for enlistment. All citizens are required to serve, regardless of sexual orientation. Act No. 1 218/1999 Coll. (Military Act) stipulates military service "for all citizens of the Czech Republic, regardless of sexual orientation." In an email from PhDr. J. Vereov of the Public Relations Department of the Ministry of Defense, he writes, "In general these issues fall in the competence of psychological personnel appointed at individual units. There is a special facility available - the ACR Open Line, where people can make phone calls to have their

problems dealt with."

Estonia: There has never been a ban on sexual minorities in the Estonian military. The Public Relations Department writes that, "according to the Estonian legislation all sexual minorities have the same rights and duties compared with the others. In respect to the army it means that all males have the duty to serve in the army and all females have the right to do so."

Ireland: According to Denise Croke of OUTHouse, a support service for gays and lesbians in Ireland, there is no gay ban in the Irish military. Cathal Kelly, International Secretary of the National Lesbian and Gay Foundation, which implements recent equality legislation in Ireland, says that the Employment Equality Act of 1998 applies to the Irish military. This act is available online at <http://www.gov.ie/bills28/acts/1998/default.htm> and is item #21 on the list.

Italy: Arcigay, the gay and lesbian rights organization in Italy, responded to inquiries by saying the legally there is no precedent of barring gays and lesbians from the military, but in reality this is not necessarily the case. If the presence of a gay service member disrupts military discipline, it appears he or she can be dismissed. Additionally, a law exists in Italy that allows gay people to avoid military service based on their homosexuality. More information is available at: www.gay.it/noi, which offers a link to the home page of NOI, Notizie Omosessuali Italiane.

Lithuania: Gays and lesbians are not legally regulated in Lithuania's armed forces. The Ministry of Defense writes that, "Theoretically they can serve openly but there is no practical case like this in Lithuania so far. Officially, no bans exist or have ever existed on service of sexual minorities in Lithuanian military."

Slovenia: There is no ban in the Slovenian military, but homosexuality is still listed among psychiatric diseases. Yet the "Rules for establishing medical capability for serving in the military" stipulate that "recruits are capable of serving in the military unless it is predicted that they will be disturbing to military unit." The Slovenian Queer Resources Directory writes, "In practice it means that gay men can avoid being drafted if they state on the draft that they are gay and that they do not want to serve." There is no known case of a professional military personnel being fired for his homosexuality.

Switzerland: Gays and lesbians are allowed to serve and there is no ban. Their ability to serve is only questioned if their sexual orientation somehow interferes with their service. (Both the Swiss Military and its gay and lesbian organization agree on this matter.)

Germany: Germany no longer has a ban on gays and lesbians, nor does it allow any form of discrimination against gays and lesbians in the military. In January of 2001, the General Inspector of the Federal Army, Harald Kujat, published a code of conduct entitled "Dealing with Sexuality" that established within the army "an equal treatment for gay lesbian members of the army" that is considered "a binding antidiscrimination measure" (from Klaus Jetz of the Lesbian and Gay Federation in Germany).

Uruguay: A 2009 email from Mauricio Coitiño, Institutional Relations Secretary of Uruguay, confirms that discrimination against gays and lesbians in the armed forces of Uruguay is forbidden. He cites a law that “penalizes the commission of acts of violence, humiliation or disrespect against people because of their sexual orientation or gender identity,” and another law that “declares that the fight against all kinds of discrimination is of national interest.” He also states that “there are no restrictions whatsoever for the participation of gay, lesbian and transgender people in our army.”

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The authors would like to thank Nina Agrawal, Research Assistant at the Palm Center, and Indra Lusero, Assistant Director of the Palm Center, for their invaluable research and administrative assistance.

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¹¹⁰ Defence reductions occurred in 1995-1997 with greater reductions, in relative terms, for the CF in personnel, equipment and budgets than in the U.S. Services.

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¹¹³ The restriction on employment in submarines was subsequently cancelled when the CF acquired new submarines that were deemed to address adequately the privacy concerns identified by the Tribunal. For the presentation of the Tribunal's decision, see *Isabelle Gauthier, Joseph G. Houlden, Marie-Claude Gauthier, Georgina Ann Brown vs. Canadian Armed Forces* (Ottawa: Canadian Human Rights Tribunal Decision 3/89, February 20, 1989).

¹¹⁴ For example, aboriginal members were permitted to grow ceremonial braids, various groups could wear beards, and Muslim women could wear specific, loose fitting uniforms that conformed to Islamic requirements for modesty. Certain restrictions on turbans, beards and loose fitting clothing were put in place to meet safety requirements; however, the underlying philosophy was one of accommodation and consultation among the chain of command, service member and religious authorities to achieve satisfactory outcomes.

¹¹⁵ For a comprehensive review of the rationale and implications for both Chaplains and members of the CF, see Joanne Benham Rennick, *Religion in the Ranks: Religion in the Canadian Forces in the 21st Century* (Vancouver: University of British Columbia Press, *in press*).

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¹¹⁸ *Gauthier et. al. vs. Canadian Armed Forces*, 67.

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¹²² Dr. Chris Madsen, Personal communication, October 14, 2009. Dr. Madsen reviews and summarizes military legal procedures to produce case studies for senior PME programs in Canada and the U.S.

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¹²⁴ 195, or 90.7%, of the participants were male.

¹²⁵ Conversely, however, they had higher levels of education, which tends to correlate with more accepting attitudes.

¹²⁶ *Duty with Honour: The Profession of Arms in Canada* (Ottawa, ON: Chief of the Defence Staff, 2003). The first author led the team that produced both *Duty with Honour* and the leadership manual *Conceptual Foundations*, to be discussed next.

¹²⁷ *Duty with Honour*, 2.

¹²⁸ *Leadership in the Canadian Forces: Conceptual Foundations* (Ottawa, ON: Chief of the Defence Staff, 2003).

¹²⁹ *Duty with Honour* draws the concept of the Warrior's Honour from the work of that name by Michael Ignatieff, which emphasizes the values used in military conduct rather than the ends achieved. The concept of the Combat Male Warrior has been presented in a number of academic publications and is examined in

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¹³⁰ Dr. Anne Irwin, Personal communication, October 14, 2009.

¹³¹ In particular, see Paul Jackson, *The Military Closet: Sexual Orientation and the Canadian Forces* (Kingston, ON: Canadian Forces Leadership Institute, 2003) and Paul Jackson, *The Experience of Military Service for Lesbians and Gay Men* (Kingston, ON: Canadian Forces Leadership Institute, 2003).

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¹³³ Belkin and McNichol, "Canadian Forces," 37.

¹³⁴ See John D. Berry and David L. Sam, "Acculturation and Adaptation" in John W. Berry, Marshall H. Segall, and Cigdem Kagicibaci, eds., *Handbook of Cross-Cultural Psychology: Vol. 31, Social Behaviour and Application* (Boston: Allyn & Bacon, 1997), 291-326 for a presentation of the model, which considers whether two groups a) work together and b) seek to preserve key elements of identity and culture.

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¹⁴⁷ Hugh Smith, Associate Professor, School of Politics, University of New South Wales, Australian Defence Force Academy, Canberra, Australia, Personal communication, August 20, 2000.

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