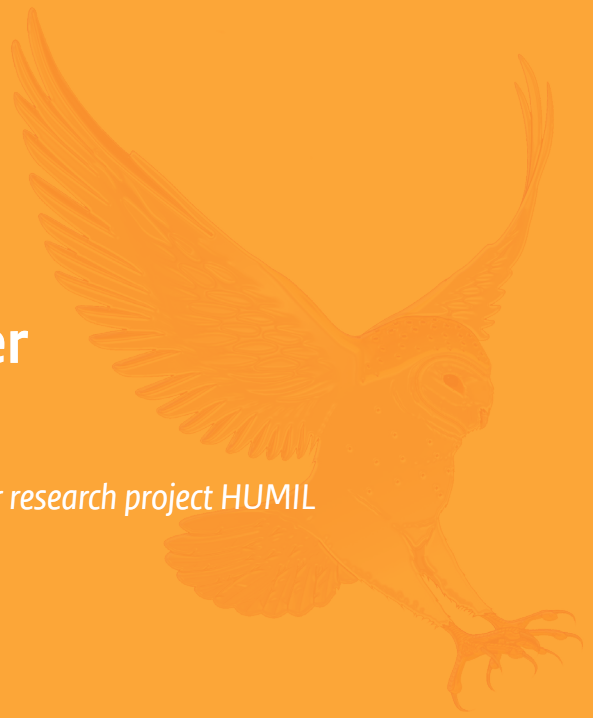


125 Research Paper

Military Humor

An exploratory pre-study for research project HUMIL

Tine Molendijk
Jori Kalkman



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This is a preliminary study for the purpose of the research project 'HUMIL: Military humor as existential meaning-making, camaraderie, and psychological coping'. It is a publication of the Research Center Military Management Studies of the Faculty of Military Science at the Netherlands Defense Academy. The research project and this pre-study have been funded through the call 'Meerjarig Onderzoek' of the Netherlands Veterans Institute (NLVi).

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Abstract

Military humor is a cornerstone in the lives of military personnel and veterans. Infused with understatement, self-deprecation and black humor, it epitomizes the distinctive character of military cultures globally. It shares noteworthy parallels with other high-impact professions, including those in the realms of police, firefighting, and healthcare. Despite its evident significance, both in the military and other high-impact contexts, the exploration of military humor, and humor in general, remains notably limited.

The limited existing research on military humor indicates that it plays an important role in helping military personnel and veterans in coping with potentially traumatic experiences, by providing a means to make sense of absurd situations and offering a social support system through fostering social cohesion. At the same time, military humor may have negative aspects, including the avoidance of emotions, moral disengagement and the exclusion of individuals and groups. These preliminary insights underscore the significance of humor for military personnel and veterans, highlighting both its beneficial and detrimental potential.

The research project 'HUMIL: Military humor as existential meaning-making, camaraderie, and psychological coping' seeks a comprehensive understanding of the diverse forms, functions, meanings and effects of military humor. The focus of this research project is on the lived experience of military personnel and veterans themselves. Ultimately, this contributes to a deeper understanding of professions that operate under high-impact conditions, mandated by the state and under the critical scrutiny of society.

This publication presents an exploratory pre-study of the project, aiming to articulate definitions and explanations of the concepts integral to its scope. The objective of this exploration is to establish a conceptual framework that resonates with all stakeholders involved. In order to effectively conceptualize the key notions in the research project, a succinct background is provided, delving into relevant ongoing debates within the humanities, organizational scholarship and social sciences, with a particular emphasis on the military literature.

This preliminary study is a publication of the Research Center Military Management Studies of the Faculty of Military Science at the Netherlands Defense Academy. The research project HUMIL and this pre-study have been funded through the call 'Meerjarig Onderzoek' of the Netherlands Veterans Institute (NLVi).

Samenvatting

Militaire humor speelt een essentiële rol in het leven van militairen en veteranen. Deze vorm van humor is doordrenkt met understatement, zelfspot en zwarte humor, kenmerkend voor militaire culturen wereldwijd. Ook vertoont het opvallende gelijkenissen met andere hoog-impact beroepen zoals politie, brandweer en de zorg. Desondanks is militaire humor, en humor in het algemeen, nog nauwelijks onderzocht.

Het schaarse bestaande onderzoek naar militaire humor wijst erop dat het militairen en veteranen kan helpen in het omgaan met potentieel traumatische ervaringen, een manier is om zin te geven aan absurde situaties en sociale steun kan bieden door sociale cohesie te bevorderen. Tegelijkertijd kan militaire humor negatieve aspecten hebben, waaronder het vermijden van emoties, morele ont koppeling en de uitsluiting van individuen en groepen. Deze voorlopige inzichten benadrukken de significantie van humor voor militair personeel en veteranen en laten zowel het helpende als het schadelijke potentieel ervan zien.

Het onderzoeksproject 'HUMIL: Militaire humor als existentiële betekenisgeving, kameraadschap en psychologische coping' heeft als doel inzicht te krijgen in de diverse vormen, functies, betekenissen en effecten van militaire humor. De focus van dit onderzoeksproject ligt op de beleefde ervaring van militair personeel en veteranen zelf. Dit draagt uiteindelijk bij aan een grondig begrip van beroepen die onder hoog-impactvoorwaarden opereren, gemandateerd door de staat en onder het kritisch toezicht van de samenleving.

Deze publicatie rapporteert een verkennende pre-studie van het onderzoeksproject gericht op de definitie en operationalisering van de kernbegrippen. Het doel van deze verkenning is het ontwikkelen van een gedeeld conceptueel en theoretisch kader dat resonanceert met alle betrokken belanghebbenden. Om de sleutelbegrippen in het onderzoeksproject effectief te conceptualiseren, wordt een beknopte achtergrond gegeven, waarbij wordt ingegaan op relevante lopende debatten binnen de geesteswetenschappen, organisatiewetenschappen en sociale wetenschappen, met bijzondere nadruk op de militaire wetenschapsliteratuur.

Deze voorstudie is een publicatie van het the Research Center Military Management Studies van de Faculteit Militaire Wetenschappen van de Nederlandse Defensie Academie. Het onderzoeksproject HUMIL en deze pre-studie zijn gefinancierd via de oproep 'Meerjarig Onderzoek' van het Nederlands Veteraneninstituut (NLVi).

1. Introduction

1.1. HUMIL: Military humor as existential meaning-making, camaraderie, and psychological coping

Military humor is a cornerstone in the lives of military personnel and veterans. Infused with understatement, self-deprecation and black humor, it epitomizes the distinctive character of military cultures globally. It shares noteworthy parallels with other high-impact professions, including those in the realms of police, firefighting, and healthcare. Despite its evident significance, both in the military and other high-impact contexts, the exploration of military humor, and humor in general, remains notably limited.

The limited existing research on military humor indicates that it plays an important role in helping military personnel and veterans in coping with potentially traumatic experiences, by providing a means to make sense of absurd situations and offering a social support system through fostering social cohesion. At the same time, military humor may have negative aspects, including the avoidance of emotions, moral disengagement and the exclusion of individuals and groups. These preliminary insights underscore the significance of humor for military personnel and veterans, highlighting both its beneficial and detrimental potential.

The research project 'HUMIL: Military humor as existential meaning-making, camaraderie, and psychological coping' seeks a comprehensive understanding of the diverse forms, functions, meanings and effects of military humor. The focus of this research project is on the lived experience of military personnel and veterans themselves. Ultimately, this contributes to a deeper understanding of professions that operate under high-impact conditions, commissioned by the state and under the critical scrutiny of society.

The approach of this research project is one that we have called an 'empathetically critical approach' (Molendijk & Kalkman, 2023). To date, military studies tend to take an overly researcher-oriented viewpoint rather than actually engaging with the 'native' experience of the soldier. Existing research focuses on the significance of military practices (including humor) in a researcher-oriented sense, while the meaning and purpose felt by soldiers themselves tend to be disregarded or readily reinterpreted for instrumental purposes. In anthropological terms, this would be labelled in terms of a difference between the 'etic' standpoint (involving the analytical explanations of the researcher) and the 'emic' viewpoint (life as experienced and described by the members of a community themselves) (Molendijk & Kalkman, 2023). This study adopts a novel approach by encompassing soldiers' personal experiences of humor and their own meaning-making of these experiences, thereby attending to issues that have remained blind spots in military research in the social

sciences. The valuable etic lens will be maintained, but an emic viewpoint will also be explicitly taken to produce a scientifically holistic perspective.

This publication presents an exploratory pre-study of the project, aiming to articulate definitions and explanations of the concepts integral to its scope. The objective of this exploration is to establish a conceptual framework that resonates with all stakeholders involved. In order to effectively conceptualize key notions in the research project, a succinct background is provided, delving into the ongoing debates within humanities, organizational scholarship and social sciences, with a particular emphasis on military science literature. This contextual exploration helps in understanding the reasons behind variations in existing studies, specifically in definitions, and the potential differences in perspectives on the nature and effects of humor.

1.2. Research questions and key concepts

The central question of this study is:

What is the current state of research in the field of humor & military humor, resilience, life-worlds & lived experience, and the relationships between them?

The key concepts are:

- Humor, including military humor
- Resilience, including advantageous & detrimental aspects of humor
- Life-worlds & lived experience

The sub questions are:

1. *What is the current state of research on humor & military humor?*
 - 1.1.1 *What is humor, and how can 'humor' be best defined in the context of this research?*
 - 1.1.2 *What are prevailing classical and modern theories on humor?*
 - 1.1.3 *What is known about military humor?*
2. *What is the current state of research on (military) humor in relation to individual and collective resilience, including advantageous & detrimental aspects of humor?*
 - 2.1.1 *What is known about (military) humor from a functionalist perspective, i.e., functional and dysfunctional aspects at the individual level?*

- 2.1.2 *What is known about (military) humor from a social-functionalist perspective, i.e., functional and dysfunctional aspects at the collective level?*
- 2.1.3 *What is specifically known about (military) humor in relation to resilience, both in positive and negative terms?*

- 3. *What is the current state of research on (military) humor in relation to life-worlds & lived experience?*
 - 3.1.1 *What is known about (military) humor from a phenomenological perspective, i.e., humor as a life-world, including humor as worldview and social commentary?*
 - 3.1.2 *What is known about the role of life-worlds in the emergence of (military) humor as lived experience and meaning-making, and what is known about the role of (military) humor as lived experience in the (re)shaping of life-worlds?*

Based on the exploration of these questions, definitions and explanations of the key concepts will be formulated. To enhance accessibility and utility, the study's description remains concise, navigating the complexity of key concepts through a focused set of research questions.

2. Humor & military humor

The question central to this chapter is: What is the current state of research on humor & military humor?

2.1 What is humor, and how can 'humor' be best defined in the context of this research?

Definitions of humor are manifold, ranging from an individual trait to a communicative activity with positive emotional reactions in perceivers (Scheel, 2017). The Cambridge Dictionary defines humor as 'the ability to be amused by something seen, heard, or thought about, sometimes causing you to smile or laugh, or the quality in something that causes such amusement'. Humor has been defined by two criteria: the first pertains to whether an event triggers laughter or smiles, and the second focuses on whether it was created with the explicit aim of provoking laughter or smiles (Attardo, 2017). Generally, humor is seen as a mental process that goes into both perceiving and creating an amusing stimulus, and also the response involved in its enjoyment (Martin & Ford, 2006). At the same time, it is widely acknowledged that humor is not just a functional psychological mechanism for individuals but also a distinctly social phenomenon (Kuipers, 2008; A. C. Zijderfeld, 1983). This is reflected in the fact that inter-personal relations and the cultural context are of major importance to understanding specific manifestation of humor. Emphasizing the social nature of humor, scholars have come to recognize that 'just as one cannot tickle oneself, so, too, one can hardly tell oneself a joke or play a prank on oneself' (Fine, 1983, p. 159).

While a completely satisfying, all-encompassing definition of humor remains elusive, scholars find common ground in the notion that humor revolves around 'the communication of multiple, incongruous meanings that are amusing in some manner' (Scheel, 2017, p. 21). In an organizational context, attention is given to the social context of humor when it is viewed as 'amusing communications that produce positive emotions and cognitions in the individual, group, or organization' (Romero & Cruthirds, 2006, p. 59; see also Dijkers et al., 2012, p. 76). This comprehensive definition of organizational humor encompasses the various levels at which humor can appear in professional settings, such as the individual, group, and organizational levels, both the cognitive and affective dimensions of humor, and the deliberate and purposeful aspect of humor within the workplace context.

2.2 What are prevailing classical and modern theories on humor?

Research on humor has remained remarkably modest considering the ever-present role of humor in daily life (Raskin, 2008). Today, humor is mainly studied in the fields of psychology and linguistics, but the theories that are now considered classic – superiority theory, relief theory and incongruity theory – come mainly from philosophers (Larkin-Galiñanes, 2017; Raskin, 2008).

Superiority theory, attributed to Plato, Aristotle and Hobbes, posits that humor can be used as a tool to assert one's superiority over others. This can be observed, for instance, in classic jokes that ridicule the intelligence of neighboring national or ethnic groups, which are prevalent in numerous cultures (Lintott, 2016). Relief theory explains humor as a mechanism for psychological stress, allowing a person to cope with their emotions and navigate social interactions (Larkin-Galiñanes, 2017). Freud, for instance, argued that joking and laughing stem from the need to relieve excess tension. Because sexual and aggressive impulses cannot be expressed openly, he maintained, they are often disguised as seemingly innocuous jests or banter (Billig, 2005; Freud, 2003). According to Incongruity theory, associated with thinkers such as Kant and Schopenhauer, the reason why we find things funny – or 'ludicrous' – is because they show us the differences between how we perceive the world and how it in fact exists (Morreall, 1986; Raskin, 2008). The use of 'puns' in jokes is an example of the incongruity principle: puns are a form of word play that rely on building and then flouting expectations. Similarly, the incongruity principle illuminates why a medical team might laugh about beeper pages such as 'Doctor, your patient is covered in ants' and 'Doctor, your patient is on fire' (Sobel, 2006, p. 1114). Besides reasons of relief, such laughter is an expression of incongruity between expectations of logic and reality.

Since the classical theories, an array of hybrid theories of humor have emerged, many of which incorporate a social scientific reorientation. Initially, most sociological research approached humor as a social corrective to maintain social cohesion and stability. Increasingly, however, studies have highlighted that humor can function to incite resistance and conflict, and can be used for purposes such as ridicule and harassment (Duncan et al., 1990; Kuipers, 2008; Larkin-Galiñanes, 2017).

In addition to this prevailing emphasis on the sociological functions and dysfunctions of humor, other studies have embraced perspectives such as structuralism and phenomenology (Huber, 2022; Kuipers, 2008; R. I. Westwood & Johnston, 2013). In line with this, there has been an increased attention to the significance of ambiguity and paradox in humor, with terms being used for humor such as 'playing with meanings' and 'playing with aggression' (Davies, 2002; A. C. Zijderfeld, 1983). Structuralist scholars like Douglas have come to understand humor

as something purposively ‘out of place’; as an ‘anti-rite’ undermining the established order (Douglas, 1968). This perspective is in accordance with Incongruity theory, as it conceptualizes humor as a break with expectations. Yet, in addition, this perspective particularly emphasizes its moral and social significance. As Kuipers (2009, p. 221) describes, ‘most humorous incongruities have a moral or social component to it. The mismatching often involves the transgression of social norms, or the breaking of established social patterns’. While transgressive humor is discomforting, it also has an alluring quality precisely because it violates moral and social standards (Douglas, 1968; Kuipers, 2009).

Phenomenological scholars view humor as a specific outlook on the social world, focusing on how individuals perceive and make sense of it. Like structuralists, they often draw on Incongruity theory. However, rather than using it to understand the (anti-)structural aspects of humor, they employ it to explore how humor, as the disruption of expectations, is a particular way of constructing the social world (Critchley, 2013; Kuipers, 2008; A. Zijderfeld, 1982). Critchley, for instance, explores how humor ‘views the world awry, bringing us back to the everyday by estranging us from it’, and how as such it ‘changes the situation in which we find ourselves, or lights up the everyday by providing an *oblique phenomenology of ordinary life*’ (Critchley, 2013, pp. 30; 28, emphasis in original). In a similar vein, Zijderfeld (1982) – who calls humor ‘playing with meanings’, among which ‘institutional meanings’ – compares humor to a ‘looking glass’. Humor, he argues, allows us ‘to look at the world and ourselves in a slightly distorted, and hence revealing, way’ (Kuipers, 2008, p. 376)

2.3 What is known about military humor?

While humor seems to be a universally human experience, it is also a linguistic and interactive process that is undeniably intertwined with the specific sociocultural context in which people live and work (Attardo, 2017). It thus seems no coincidence that military humor seems to possess distinctive features that set it apart from other national and occupational cultures of humor, yet shares striking similarities across nations (Ben-Ari & Sion, 2005; Molendijk & Kalkman, 2023; Nazareth, 2008; Saramifar, 2019; Sløk-Andersen, 2019). Moreover, many resemblances can be found between military humor and the humor used in other high-impact professions such as police work, firefighting and healthcare (Rowe & Regehr, 2019; Van Wormer & Boes, 1997; Watson, 2011). A fundamental aspect of all these professions is the confrontation with human suffering and the infliction of harm.

The soldier’s job is characterized by a particularly complex relationship with violence (Hannah & Sowden, 2013; Molendijk, 2021). While other high-impact

professions, such as police work, firefighting and healthcare, also involve harm and suffering, soldiers may have to inflict pain on individuals without directly serving their benefit, while serving a purpose that may not always be clear to the soldiers, and while facing the risk of injury and death (Molendijk, 2021; Rauch & Ansari, 2022). This complexity is further compounded by the intricate entanglement of the military with politics and society. As members of an organization that is a much-scrutinized instrument of the state, soldiers are tasked with performing 'dirty work' within a critical society (Molendijk, 2021; Rauch & Ansari, 2022). This is what distinguishes the military profession from other professions, except the police: soldiers have multiple relationships with violence, as potential witnesses, victims and enforcers of harm, and as state instruments scrutinized by a society of which they are also members, all at the same time, resulting in an ambiguous and paradoxical moral and social standing.

An initial exploration (see also Molendijk, forthcoming) indicates that at least the following three styles of humor are typical components of military humor: black humor, self-deprecation and understatement. As will be further discussed in the section on life-world and lived experience, the prevalence of these particular humor styles appears related to the harsh reality of the soldier's profession, characterized by the constant risk of becoming a victim, witness and/or enforcer of violence. Black humor is a style of humor that makes light of otherwise taboo subjects such as suffering and death, mercilessly violating these taboos. According to dictionary definitions, black humor is 'used to express the absurdity, insensitivity, paradox, and cruelty of the modern world' (Columbia Electronic Encyclopedia, 2023). Black humor can be a step on a slippery slope leading to moral disengagement (Watson, 2011). At the same time, when done in conscious awareness, the opposite may be the case. While making light of grim and morbid situations, black humor has also been found to acknowledge these grim and morbid aspects instead of denying their existence (Rowe & Regehr, 2019; Üngör & Verkerke, 2015; Watson, 2011). Black humor then implies purposefully stepping outside the moral and emotional domain, living 'in a terrain of terrifying candor concerning the most extreme situations' (Janoff, 1974, p. 303).

In addition, self-deprecation surfaces as a recurring feature of military jokes, which is a style of humor where people make fun of themselves and their own flaws or mistakes (Hopton et al., 2013; Martin et al., 2003). At the core of these jokes is the recognition that the joke applies to oneself. With these jokes, soldiers mockingly acknowledge that they all voluntarily signed up for a job that can make them feel like meaningless cogs in a psychologically, physically and morally dangerous system. Self-deprecating humor has been documented as a means to diffuse tension, show humility and connect with others (Martin et al., 2003; Üngör & Verkerke, 2015). Unlike self-defeating humor, which articulates a negative and depressive view of the self, self-deprecating humor conveys an honest and humble look at oneself (Hopton et al.,

2013; Martin et al., 2003). In addition, military self-deprecation has two features beyond those typically associated with this humor style. Firstly, it targets not just the individual self but also the military 'we', 'us idiots', sharing a risky job for little pay and sometimes without even the basic tools. Secondly, military self-deprecation addresses the soldier's job's essence of violence and suffering, comparable to what black humor does but in a more indirect way. Consider the importance of self-dehumanization in military humor (Verrips, 2004). This type of self-deprecation is a collective acknowledgment of the perils of military work and the partly dehumanizing relation to oneself required to do this work.

Humorous understatement appears as a third typical feature of military humor. Understatement intentionally downplays the importance of things, presenting something as less significant than it really is. As a consequence, it creates an incongruity between expectation and reality, making it funny (Colston & O'Brien, 2000; Wilcox, 2018). This allows people to express the actual seriousness of the situation in a joking manner. In the military, moreover, humorous understatements often have a 'carnavalesque' quality, as they temporarily subvert the seriousness of military life. Furthermore, like carnival, some understatements may seem ludicrous at first sight, while they actually mirror the absurdity of the reality they address, not unlike the comic relief provided by hospital clowns for terminally ill children (Raviv, 2014). While in normal contexts, harsh jokes about death can be called a ridiculous overstatement, in the military, it can be seen an *understatement* of the extreme conditions that military personnel actually face. The fact that soldiers willingly expose themselves to violence, whether as witnesses, victims, or enforcers, is an absurd reality that is both underscored and understated by these types of jokes.

3. Humor & resilience, including advantageous & detrimental aspects of humor

The question central to this chapter is: What is the current state of research on (military) humor in relation to individual and collective resilience, including advantageous & detrimental aspects of humor?

3.1 What is known about (military) humor from a functionalist perspective, i.e., functional and dysfunctional aspects at the individual level?

Studies on organizational humor often focus on its functions and dysfunctions for individual well-being or performance (Kuipers, 2008; Mesmer-Magnus et al., 2012; Romero & Cruthirds, 2006; R. I. Westwood & Johnston, 2013). This is illustrated by the fact that the few studies examining the use of humor by professionals such as doctors, nurses, firefighters, police officers and soldiers focus on its function as a coping strategy (Dangermond et al., 2022; De Rond & Lok, 2016; Henman, 2001; Rowe & Regehr, 2019; Ward et al., 2021).

Notably, the body of literature on military humor is scarce, which is surprising in view of the significance that soldiers place on humor. Within this limited literature, the majority of studies on military humor focus on its function as a psychological coping mechanism too (De Rond & Lok, 2016; Henman, 2001; Ward et al., 2021). Humor, it is concluded, provides a way to release tension, thereby reducing stress, mitigating burn-out risks, and minimizing fear, because it allows soldiers to temporarily escape from the intense reality of their duties (Ben-Ari & Sion, 2005; Henman, 2001; Mesmer-Magnus et al., 2012). Humor, as such, can support healthy emotion regulation. As Bjerke and Rones (2017) highlight, humor may also serve as a strategy for soldiers to manage life in the 'total institution' of the military, where their daily lives are almost completely under bureaucratic control.

At the same time, these studies have found that humor as psychological coping may also have adverse effects. For instance, individuals may resort to humor as a way to avoid addressing or processing serious or traumatic issues (Boerner et al., 2017; Kuiper, 2012). This can lead to a superficial response to deeply distressing situations, preventing individuals from properly confronting and dealing with their emotions. In such cases, humor may be used as a defense mechanism, effectively masking the underlying problems (Besser et al., 2012; Buchanan & Keats, 2011; De Rond & Lok, 2016). Specifically in the military, it seems, soldiers may use humor to mask or downplay their emotional pain, which can hinder their ability to seek

appropriate help and support when needed (Ben-Ari & Sion, 2005; Bjerke & Rones, 2017; De Rond & Lok, 2016; Sion & Ben-Ari, 2009).

3.2 What is known about (military) humor from a social-functional perspective, i.e., functional and dysfunctional aspects at the collective level?

From a *social* functionalist perspective, humor has been identified as a social corrective to maintain social cohesion and stability (Kuipers, 2008). In organizational research, studies on humor have shown its potential for group cohesiveness and communication (Cooper, 2008; Huber, 2022; Robert & Wilbanks, 2012; E. Romero & Pescosolido, 2008; Terrion & Ashforth, 2002). It can help to convey messages, instructions or important information in a more engaging and memorable way (Cooper, 2008; Huber, 2022; Robert & Wilbanks, 2012; E. Romero & Pescosolido, 2008; Terrion & Ashforth, 2002). Humor can serve socialization purposes too and help to distinguish between the in-group and outsiders, who do not understand their humor. It is also a sign of mutual trust among group members and contributes to the formulation of a collective purpose (Terrion & Ashforth, 2002; Romero & Pescosolido, 2008). Moreover, research has shown how humor may enhance leadership, by establishing a more personal connection with team members, by enhancing communication, and by boosting team morale, employer well-being, and motivation (Priest & Swain, 2002; Robert & Wilbanks, 2012; E. J. Romero & Cruthirds, 2006; Cooper et al., 2018; Mesmer-Magnus et al., 2012; Yam et al., 2018). By extension, researchers have examined the potential for humor to be subversive within power relations in a manner that is accepted by leaders (Alonso & O'Neill, 2022; Cooper, 2008; Dwyer, 1991; Kwon et al., 2020; Rodrigues & Collinson, 1995).

Researchers on humor in the military, next, found that 'there is always a lack of clarity in humor, an essential obtuseness to jokes because one never "really knows" whether the criticism voiced through them is laughable or serious' (Ben-Ari & Sion, 2005, p. 66). As such, military humor is not as effectively subversive as sometimes suggested, and not even intended as such. As stated, humor may also serve as a strategy for soldiers to manage life in the 'total institution' of the military, and in this context, 'joking relationships' between soldiers and their superiors make it possible to bridge the social gap and communicate in a non-authoritarian manner without violating formal hierarchy (Bjerke & Rones, 2017). Still, in some cases, such informal criticism of the social order can be harbingers of more open forms of resistance and reflect organizational alienation (Kalkman, 2022).

Indeed, studies have highlighted that humor can function to incite resistance and conflict, and can be used for purposes such as ridicule and harassment (Duncan et al., 1990; Kuipers, 2008; Larkin-Galiñanes, 2017). For instance, research on humor has

emphasized its propensity to deteriorate into toxic relations and harassment (Collinson, 1988; Duncan et al., 1990; Sløk-Andersen, 2019). The pressure to conform to the dominant culture's sense of humor can be intense in military settings: traditional masculine norms are particularly strong. Research has found that military humor tends to reinforce these traditional masculine norms, thus possibly contributing to marginalizing women and LGBT+ individuals (Bjerke & Rones, 2017; Godfrey, 2016; Sløk-Andersen, 2020). For instance, military humor can often feature jokes that rely on stereotypes about traditional gender roles. This might include making fun of men who don't fit the stereotypical "tough" image or using derogatory language to describe individuals who don't conform to traditional norms of gender and sexual orientation, as well as norms related to other aspects, such as ethnicity (Bjerke & Rones, 2017; Godfrey, 2016; Sløk-Andersen, 2020).

So, humor in the military has a subversive quality, enabling soldiers to express dissent towards military leadership by 'joking up' toward superiors. It can incite resistance and play a role in social conflict. At the same time, it tends to contribute to group cohesion and preserve the social order – if not the social order of the military at large then at least the specific social order of the joking group. Its social functions are clearly multifaceted.

3.3 What is specifically known about (military) humor in relation to resilience, both in positive and negative terms?

Research into the relationship between humor and resilience is limited and fragmented. In the existing literature, coping and resilience are still frequently used interchangeably, but both concepts are clearly distinct. The term "resilience" originates from the Latin word 'resilire,' which signifies the capacity to 'bounce back'. This term is employed across various disciplines and despite the apparent differences in how resilience is described, there are some commonalities in understandings of resilience, which set it apart from coping. Coping, in fact, is primarily a reaction to an external shock, such as a traumatic experience, while resilience is about the proactive adaptive capacity of people or social collectives to handle environmental changes. In addition, resilience has a positive connotation, because it can serve as a buffer to adverse events, reducing the potential negative impact of stressful experiences as well as the need for coping (Fletcher & Sarkar, 2013). After the event, models of coping with stress focus on remaining upright and unaffected in the face of adversity, while resilience implies the ability to resile like a spiral spring after a breakdown (Atkinson et al., 2009; Zolli & Healy, 2012). Also, while many approaches focus on performance enhancement during a stressful event, a resilience approach focuses on general

psychological health and well-being in the long run, which stretches much beyond the single event (Robson & Manacapilli, 2014).

In psychology, resilience has therefore been defined as ‘the role of mental processes and behavior in promoting personal assets and protecting an individual from the potential negative effect of stressors’ (Fletcher & Sarkar, 2013, p. 16). In line with our definition of humor, however, a more appropriate working definition of resilience for this research is one that encompasses various levels at which humor can manifest in professional settings, such as the individual, group, and organizational levels. From this perspective, resilience can be defined as ‘the capacity of a system, enterprise, or a person to maintain its core purpose and integrity in the face of dramatically changed circumstances’ (Zolli & Healy, 2012, p. 7).

Humor has been shown to play a positive role in both resilience and posttraumatic growth. For instance, enjoying humor and having a sense of humor in stressful conditions were significantly and positively related to hope, and humor also is able to significantly predict posttraumatic growth, i.e. positive psychological change after trauma (Karami et al., 2018; Kuiper, 2012). More generally, studies show that use of coping through humor is positively associated with resilience and well-being (Cherry et al., 2018; Oosthuizen, 2021). Yet, it seems that only *self-enhancing* humor provides reliable benefits (Boerner et al., 2017; Cann & Collette, 2014). Research shows that self-defeating humor may contribute to negative changes, avoidant states and emotion regulation difficulties (Boerner et al., 2017; Kuiper, 2012). Generally, the potential positive relation between humor and resilience in various contexts seems to hold in a military context too (Rice & Liu, 2016).

4 Humor, life-worlds & lived experience

The question central to this chapter is: What is the current state of research on (military) humor in relation to life-worlds & lived experience?

4.1. What is known about (military) humor from a phenomenological perspective, i.e., humor as a life-world, including humor as worldview and social commentary?

Phenomenological scholars view humor as a specific outlook on the social world, focusing on how individuals perceive and make sense of it. Therefore, researchers have emphasized the importance of understanding the specific context in which humor is expressed and received, including the prevailing social rules, norms and taboos, in order to fully comprehend its intended meanings and purposes (Alonso & O'Neill, 2022; Kuipers, 2008; Üngör & Verkerke, 2015). We must, in other words, first understand an individual's life-world, defined as 'the world in which we humans find ourselves living, immediately experienced as a "given", prior to any philosophising or conceptualising' (Gorichanaz et al., 2018, p. 882). At the same time, conversely, it has been argued that humor is a valuable analytical tool for understanding the life-world or specific context in which it is used by exposing and exploring the prevailing rules, norms and taboos that humor relies on (Douglas, 1968; M. Hatch & Erlich, 1993; M. J. Hatch, 1997; A. Zijderveld, 1982).

Understood as such, the question of whether humor is functional or dysfunctional is a less important question. A phenomenological perspective may draw attention to the complex role of incongruity in military humor. By making fun of the worst aspects of life, military jokes transgress significant psychological, emotional and moral expectations and boundaries (Davies, 2002; A. C. Zijderveld, 1983). The 'funniest humor is not necessarily the healthiest', as researchers on humor and mental health have pointed out (Martin, 2008, p. 486).

A phenomenological lens also reveals that such jokes may serve as a poignant commentary on the existential and social realities faced by soldiers. As Critchley eloquently wrote (2013, p. 28), the 'extraordinary thing about humor is that it returns us to common sense by distancing us from it'. As discussed, black humor in the military context is not just a joke about imaginary horror, but a candid contemplation of real suffering and death, and an expression of the absurdity of being a soldier. Humor in this sense is 'what happens when we're told the truth quicker and more directly than we're used to' (Saunders cited in Watson, 2011, p. 38).

Humor, then, takes the role of critique of life in a more or less veiled way. In other harsh context, such as slums, human suffering is known to produce absurdist and black humor (Goldstein, 2013; Schmidt, 2017), which exposes and criticizes difficult living conditions. Next, humor can be an accepted or tolerated form of bottom-up criticism in a total institution, which generally leaves little to no room for formal complaints. In this way, it is a form of discursive resistance or active defiance, as it creates a liminal space for organizational members to voice their concerns and discontent (Goffman, 1961; Westwood & Johnston, 2013). It even opens up the possibility of self-criticism when people reflect on a character change that they perceive to be negative (e.g. De Rond & Lok, 2016). Through its criticism of the status quo, humor presents (the possibility of) an alternative social reality (see Scott, 1985), although it does not tend to energize large-scale social change in practice and often even reinforces the existing order by replacing 'real' resistance (Mulkay, 1988).

Still, humor has been identified as possessing a unique ability to do what serious discourse of reason and logic cannot: dealing with the 'interpretive difficulties' of social reality by shedding light on them through articulation (M. J. Hatch, 1997; Jarzabkowski & Lê, 2017; Mulkay, 1988). While inconsistencies are problematic in serious discourse, they are an integral aspect of humor. Humor emerges from the multiplicity of social reality, and 'occurs because mundane, serious discourse simply cannot cope with its own interpretive multiplicity' (Mulkay, 1988, p. 214). As such, humor is a particular way of constructing the social world too, particularly when the environment is a seemingly incomprehensible one (Critchley, 2013; Kuipers, 2008; A. Zijderfeld, 1982). It is a looking glass through which we see everything in a 'slightly distorted, and hence revealing, way' (Kuipers, 2008, p. 376).

4.2 What is known about the role of life-worlds in the emergence of (military) humor as lived experience and meaning-making, and what is known about the role of (military) humor as lived experience in the (re)shaping of life-worlds?

Humor needs to be understood in its social context, because the interpersonal relations and cultural background shape the content and form of humor in a particular setting. In other words, life-worlds shape the lived experiences of humor. Lived experience, here, refers to any 'personal knowledge about the world gained through direct, first-hand involvement in everyday events rather than through representations constructed by other people' (Chandler & Munday, 2011). In research on humor as lived experience, scholars study how humorous interactions in daily life help people to attribute meaning to their social relations, their own situation, and themselves

(Kuipers, 2008). It allows them to develop a (social) identity on an individual level and a team culture or group identity on a collective level.

To understand the importance of life-worlds in military humor, it is important to acknowledge that this type of humor only makes sense in the context of psychological and physical hardships (see De Rond & Lok, 2016). Daily life in the armed forces is full of paradoxes due to the coexistence of adrenaline and boredom, fear and excitement, attacking and helping people, hierarchy and comradeship, political disinterest and dependence, and societal recognition and stereotyping (Kalkman, 2020; Molendijk, 2021). More specifically, soldiers are, on the one hand, perceived with discomfort because their doing the 'dirty job' of violence, while, on the other hand, their job tends to be seen as heroic and fascinating (Molendijk, 2018; Woodward, 2000). This multiplicity of ambiguities and paradoxes renders soldiering 'a dubious virtue' (Eikenaar, 2023). Politically, soldiers are so-called instruments of the state, granted with a monopoly on violence (Rukavishnikov & Pugh, 2006). At the same time, in response to societal discomfort with violence, the political leadership may create humanitarian-focused mission narratives while downplaying aspects of combat (Dimitriu & Graaf, 2016; Molendijk, 2019). As an organization, the armed forces operate as both a warrior-family and a bureaucratic organization. Soldiers are socialized into a close-knit brotherhood with significant responsibility and autonomy, expected to perform highly demanding tasks in dangerous and high-stress environments, with a 'can-do attitude' and the motto of 'leaving no one behind' (Arundell, 2009; Moelker & Schut, 2011; Soeters et al., 2006). However, they are also expected to comply with a strongly centralized hierarchy and viewed as replaceable assets within a bureaucracy (Soeters et al., 2006; Vogelaar & Kramer, 2004).

These complexities directly affect soldiers' life-world and lived experience. On the one hand, soldiers must embody a military identity that demands a 24/7 commitment and a flexible can-do attitude to adapt to dangerous and unpredictable circumstances. On the other hand, they learn to view their profession as 'just a job', being a cog in a hierarchical bureaucratic system. In any case, the essence of being a soldier is the willingness to run the constant risk of becoming a victim, witness and/or enforcer of violence (Hannah & Sowden, 2013; Molendijk, 2021; Rauch & Ansari, 2022). It seems that, at least in part, these characteristics of the soldier's life-world is related to the emergence of the aforementioned typical styles of military humor, including black humor, self-deprecation and humorous understatement. Indeed, their humor offers military personnel the possibility of navigating through these work-related paradoxes.

It is important to stress here as well that soldiers, as personnel of other organizations, are not just passive recipients of their life-worlds. To some extent, they create and guide their own lived experiences as agentic individuals. In a total institution like the armed forces, this room for agency might seem limited at times,

but it is never completely absent, even if humorous interactions only serve to uphold the status quo. For instance, military humor often focuses on the perceived superiority of men over women, in which women are viewed as sub-par fighters and (jokingly) attributed supporting roles. Such humor reflects the life-world in many armed forces, but also reinforces masculinity as a norm (Sion & Ben-Ari, 2009), which reinforces gender-specific lived experiences in the military context. Methodologically, for scholars interested in (military) humor, a focus on lived experiences means that interpretations and analyses are not just imposed, but require attention for the understandings that military research participants attribute themselves to humorous instances.

5 Conceptualization of key concepts

Based on the preceding review, this concluding chapter formulates definitions and explanations of the key concepts.

Key concepts	
Working definition of humor	The 'communication of multiple, incongruous meanings that are amusing in some manner' (Scheel, 2017, p. 21).
Working definition of organizational humor	'Amusing communications that produce positive emotions and cognitions in the individual, group, or organization' (Romero & Cruthirds, 2006, p. 59).
Working definition of resilience	The 'capacity of a system, enterprise, or a person to maintain its core purpose and integrity in the face of dramatically changed circumstances' (Zolli & Healy, 2012, p. 7).
Working definition of life-world	'The world in which we humans find ourselves living, immediately experienced as a "given", prior to any philosophising or conceptualising' (Gorichanaz et al., 2018, p. 882).
Working definition of lived experience	'Personal knowledge about the world gained through direct, first-hand involvement in everyday events rather than through representations constructed by other people' (Chandler & Munday, 2011).

Table 1: Key concepts

Key aspects of (military) humor

<p>Typical characteristics of the military life-world</p>	<ul style="list-style-type: none"> • Individual: Potential victim, witness and enforcer of force • Organizational: Hierarchical bureaucracy <i>and</i> brotherhood with can-do mentality • Political: Monopoly on violence, (voluntary) instruments of force • Societal: fascination <i>and</i> condemnation
<p>Typical styles of military humor</p>	<ul style="list-style-type: none"> • Black humor • Self-deprecation • Humorous understatement
<p>Functions & dysfunctions of (military) humor, from a functionalist perspective</p>	<ul style="list-style-type: none"> • Emotional relief <i>versus</i> emotional avoidance • Social bonding <i>versus</i> social exclusion • Maintenance of social order <i>versus</i> Criticism and subversion
<p>Meanings of (military) humor from a phenomenological perspective</p>	<ul style="list-style-type: none"> • Playing with meanings, playing with aggression • Existential reflection • Social commentary • Articulating specific outlook on the social world

Table 2: Key aspects of (military) humor

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Military humor is a cornerstone in the lives of military personnel and veterans. Infused with understatement, self-deprecation and black humor, it epitomizes the distinctive character of military cultures globally. It shares noteworthy parallels with other high-impact professions, including those in the realms of police, firefighting, and healthcare. Despite its evident significance, both in the military and other high-impact contexts, the exploration of military humor, and humor in general, remains notably limited.

The limited existing research on military humor indicates that it plays an important role in helping military personnel and veterans in coping with potentially traumatic experiences, by providing a means to make sense of absurd situations and offering a social support system through fostering social cohesion. At the same time, military humor may have negative aspects, including the avoidance of emotions, moral disengagement and the exclusion of individuals and groups. These preliminary insights underscore the significance of humor for military personnel and veterans, highlighting both its beneficial and detrimental potential.

The research project 'HUMIL: Military humor as existential meaning-making, camaraderie, and psychological coping' seeks a comprehensive understanding of the diverse forms, functions, meanings and effects of military humor. The focus of this research project is on the lived experience of military personnel and veterans themselves. Ultimately, this contributes to a deeper understanding of professions that operate under high-impact conditions, mandated by the state and under the critical scrutiny of society.

This publication presents an exploratory pre-study of the project, aiming to articulate definitions and explanations of the concepts integral to its scope. The objective of this exploration is to establish a conceptual framework that resonates with all stakeholders involved. In order to effectively conceptualize the key notions in the research project, a succinct background is provided, delving into relevant ongoing debates within humanities, organizational scholarship and social sciences, with a particular emphasis on military science literature.

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