



## Conceptualising a research interrogating of management functions in the South African National Defence Force

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### ARTICLE INFO

#### Article history:

Received 01 October 2023

Received in rev. form 28 Nov. 2023

Accepted 12 December 2023

#### Keywords:

South African Defence National Force, Systems management, Research conceptualisation, Research problem analysis, Research knowledge gap analysis

#### JEL Classification:

L290

### ABSTRACT

*South African Defence Review 2015 found that the South African National Defence Force (SANDF) is in significant decline and will lose important military capabilities in the long term if nothing is done. In a shrinking defence budget, general rhetoric blames aging equipment and staff for the decline. However, managerial issues in the SANDF may be to blame for the decline. We examined academic and other literature to find the origin of this problem and found that the SANDF does not use a systems management methodology to manage tasks. This peculiarity hinders SANDF management and prevents it from providing credible defence to South Africa. We found that empirical studies on SANDF management are scarce and failed to explain this oddity. To understand why the SANDF's application inherent management functions fail to provide a genuine defence capacity, this paper proposes a cognitive technique to conceptualize an empirical investigation beyond a literature review. We propose a systems management approach based on the Administrative Theory of Management, Neoclassical Theory of Management, and General Systems Theory frameworks in management education. We believe that empirical public and management research may create defence capabilities management understanding. This premise guides our study conceptualization by outlining the research context and then doing a research problem analysis to find the knowledge gap. To examine the literature, we use thematic summative content analysis. The research conceptualisation—problem statement, purpose statement, research questions, strategy, design, process, and methods, and interpretative frameworks—is based on this analysis. On the latter, we expect to write later.*

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## Introduction

In 2015, the Department of Defence (DoD) promulgated the South African Defence Review 2015 (hereafter referred to as the Defence Review 2015). The Defence Review 2015 revealed that the South African National Defence Force (SANDF) is in a state of serious decline and if the situation is not rectified, critical military capabilities will cease to exist in the medium term. This statement provoked fears regarding the capability of the SANDF to perform its Constitutional obligations to defend South Africa. The pungent debates that followed mainly centred on two opposing propositions: (1) that there is a serious budget deficit to sustain the SANDF; (2) the situation is caused by management deficiencies in the absence of a systems management approach. Thus, strategies, activities, resources and budget allocations are not aligned with the required outputs to ensure that the SANDF can function as an effective and efficient defence capability. Therefore, conforming to its Constitutional obligations but also with in the construct of accountability and civil oversight in accordance with the principles of managing a military within a liberal democracy. We interrogated academic and non-academic literature to explore the two opposing propositions. Critical observation of the literature confirmed that the political and the bureaucratic view of the weakening defence capability predominantly centres on the disjunction between an adequate defence budget and an ageing defence force. In contrast, military analysts and academics claim that there is sufficient evidence supporting the notion that management deficiencies of the defence capability are the root cause of the decline of the SANDF's operational readiness. Military analysts and academics support their argument by stating that that the SANDF failed to align its strategies,

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activities, outputs and budget allocations with the contemporary human security discourse and the economic realities of South Africa. This, they argue, informed the strategic failure and decline of the defence capability.

We support the postulation that management deficiencies is the root cause of the decline of the SANDF operational capability, by challenging general rhetoric and argue that the SANDF failed to adapt to fundamental paradigm shifts in South Africa after its transition to a non-racial democracy in 1994. Our argument derives from literature that reveals the disjunction between the current force design, size, and strategies of the SANDF are not aligned with an affordable peace time military force and the contemporary security threats. This renders the SANDF fundamentally ineffective and unaffordable in its current posture. What remains largely unanswered is: “Why does this phenomenon exist?” To answer this question, we sourced and interrogated academic as well as other literature to describe management practices in the SANDF. Using the information that derived from the review, we concluded that management functions in the SANDF is not executed within a system management approach, hence renders management ineffective. Therefore, we argue that this anomaly primarily underpins the persistent deterioration of the SANDF and its inability to provide a credible defence capability within the spectrum of conflict.

In sourcing and reviewing literature, we also discovered that the general debate on defence as well as empirical studies on management of the SANDF is limited to a small group of academics and military analysts. Furthermore, previous studies of the management arrangements of the SANDF also did not reveal the root cause and nuances why this anomaly exists. Reviewing of the literature also revealed that literature describing management in the SANDF is generally normative and mainly centres on elements of management like leadership or strategy. Therefore, academic and other literature fails to provide clear evidence of why critical management deficiencies exist within the SANDF within the ambit of a systems management approach. We concluded that the absence of explicit evidence of management deficiencies in the SANDF creates an explicit knowledge gap in this knowledge area. Therefore, we challenge conventional perceptions regarding the management of the SANDF which necessitates an exploration into the management as a critical attribute in the SANDF to create a deeper understanding of the existing abnormality.

We start the discussion with a brief introduction of the SANDF and concepts related to management to create a premise to contextualise the research problem and research purpose. This is followed by Section 5 where we detail the discussion on the proposed research context, being the proposed research problem statement, the proposed research purpose and the proposed research questions. From there we move to proposing a possible interpretive framework, research strategy, design, procedure and methods that might be able to satisfy the research objectives.

## Literature Review

### The South African National Defence Force; history and description

The South African National Defence Force (SANDF) was established in 1994 after the South Africa’s transition into a non-racial democracy (Department of Defence, 2016). This was done by integrating seven former statutory and non-statutory forces from the Apartheid era who were in actual fact belligerents (Department of Defence, 2016). Table 1 provides an overview of the former forces and their personnel number at the time of integration.

**Table 1:** SANDF Composition During Integration

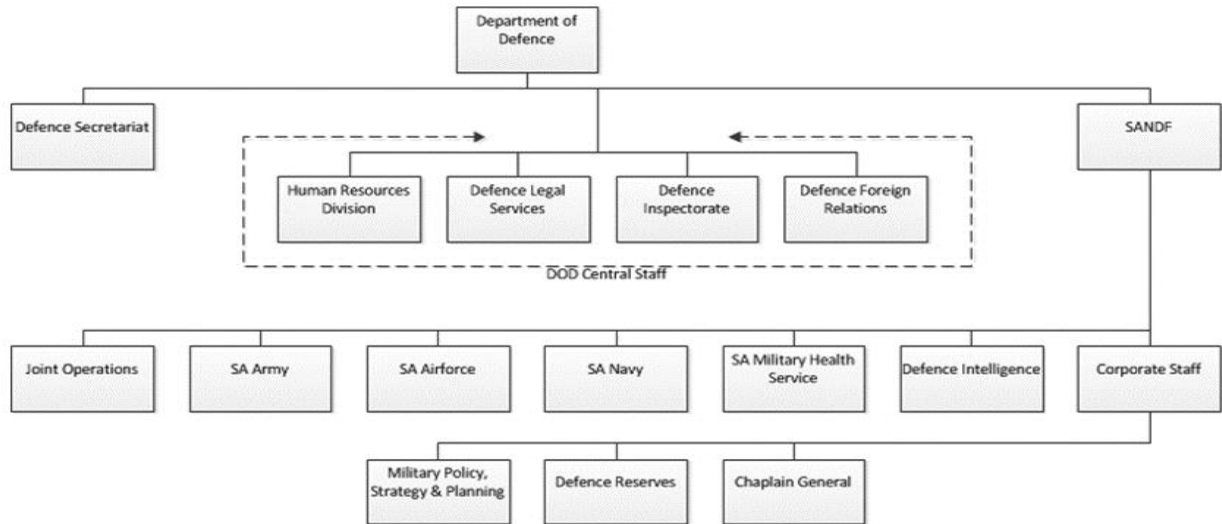
Former Force	Personnel Strength
SADF	110 000
Umkhonto we Sizwe (MK)	26000
Homelands	6000
Azanian People’s Liberation Army (APLA)	6000
The KwaZulu Self-Protection Forces (KZSPF)	2000

**Source:** (Mills, The South African National Defence Force, 1999)

Thus, after 1994 the SANDF was South Africa’s only legitimate defence capability authorised to use lethal force in defence of the country and its territory. Section 199 (1) and (2) of the Constitution of the Republic of South Africa, 1996 (Act 108 of 1996) (hereafter referred to as The Constitution) provides the legal mandate for the SANDF to execute its functions (The Constitution of the Republic of South Africa, 1996). Furthermore, the power that is bestowed on the SANDF is controlled by legislation, civil oversight and parliamentary processes which adheres to the principles of a defence in a democracy and accountability (Jordaan, 2018; Mills, 2011).

The provisions of Section 200 (2) of The Constitution, assigned the responsibility of the SANDF to defend the country and its territorial integrity (The Constitution of the Republic of South Africa, 1996). This function is in effect a continuation of the primary function of the former South African Defence Force (SADF) despite the drastic change in the national security policy trajectory of South Africa after 1994 (Jordaan, 2018). In the execution of this responsibility, the SANDF consequently assumed a conventional force design which centres on a multi-dimensional defence capability, tailor-made to fight limited wars on/or adjacent to the African continent (Department of Defence, 2016; Jordaan, 2018). Furthermore, the force design is supported by a force structure which

consists of a defence headquarters, four services and seven divisions that in combination provides the multi-dimensional defence capability in accordance with the provisions of the Constitution, 1996 (Act 108 of 1996) (See Figure 1) (White Paper on Defence 1996, 1996). The force structure of the SANDF demonstrated a radical change from the former SADF and had a significant influence on the conceptualisation of the management of the defence capability (Mills, 1999). Where the defence structure of the Apartheid era and the SADF displayed a self-centric governance character, the current Department of Defence is bicephalous that balances civil control, a separation of duties and functional outputs (Mills, 1999).



**Figure 1: SANDF Structure;** *Source: White Paper on Defence (1996)*

The advent of a non-racial democracy and the radical changes that occurred in the South Africa’s political and social architecture after 1994 also allowed South Africa to integrate in the international community and security regimes (White Paper on Defence 1996, 1996). This transition implies that South Africa also assumed responsibilities to uphold regional and continental security (White Paper on Defence 1996, 1996). Furthermore, in response to changing international security agenda in the aftermath of the Cold War (Levy, 2005; Moody, 2009), South Africa parted with its former state-centric security approach and adopted a human security policy trajectory (White Paper on Defence 1996, 1996). The SANDF accordingly assumed a peace time posture to conform to government’s foreign policy of conflict resolution through diplomacy (Department of Defence, 2016). The Constitution, 1996 (Act 108 of 1996) duly acknowledge this paradigm shift and provide a legal mandate to the SANDF to execute secondary tasks in terms of Section 24, Schedule 6 of The Constitution in time of peace (The Constitution of the Republic of South Africa, 1996). These tasks manifest in the ambit of adherence to international obligations, to maintain law and order in co-operation with the SAPS, and to provide support to other government departments (The Constitution of the Republic of South Africa, 1996). Thus, the provisions of The Constitution, 1996, task the SANDF with the responsibility to execute a variety of secondary functions as a credible defence capability within the construct of Military Operations Other Than War (MOOTW) whilst adhering to the principles of a liberal democracy.

From a structural defence transformation, a post conflict reconstruction and governance perspective, the establishment of the establishment of SANDF seems faultless (Mills, 1999). Defence analysts such as Mills (1999) regards the establishment of the SANDF as a textbook example of successful transformation of the civil service of a country in transition. In addition, in terms of theories on security sector reform (SSR), the establishment of the SANDF demonstrates a sound foundation for transforming the SANDF into a representative but credible defence capability (Mills, 1999; Sedra, 2018). At the time of integration, the former SADF component of the SANDF numbered 110 000 and formed the nucleus of the existing structures and systems of the SANDF (Mills, 1999). On the other hand, the other components contributed 26 000 from Umkhonto we Sizwe (MK), 6000 from Azanian People’s Liberation Army (APLA), 6000 from the former independent homelands and 2000 from the KwaZulu Self-Protection Forces (KZSPF). Whilst the new government provided a new political direction, the newly formed military leadership opted to continue using a highly effective management system from the former SADF (Mashike, 2007; Mills, 1999). The rationale supporting this arrangement derives from the statutory nature and conventional force design of the SANDF (Department of Defence, 2016). Thus, force structures and management systems remained grounded in traditions of a conventional statutory force which were more familiar to the SADF component of the SANDF (Mashike, 2007). The critical challenge is that these systems were unfamiliar to the non-statutory component and resulted that a portion of former non-statutory members felt that they were integrating in the SADF rather than creating a new defence force (Mashike, 2007). This in effect created a form of inequality in the SANDF that was resented by the former non-statutory component (Mashike, 2007).

Here it can be argued that the management dilemma in the SANDF is a direct consequence of multiple and unresolved issues that has its origins in the establishment of the organisation and the realm that was prevalent in South Africa prior to becoming a non-racial democracy (Le Roux, 2003; Esterhuysen & Mokoena, 2018; Williams, 2000). These issues are mainly situated in the diverse

social construct and personnel component of the SANDF that is central to the management approach and philosophies of the SANDF (Esterhuysen et al., 2018; Mashike, 2007). Several authors, for example Esterhuysen and Mokoena (2018), Mashike (2007) and Mills (2011) further argue that the establishment of the SANDF in 1994 bore perilous disparities that remains unresolved and has a direct bearing on the current management dilemmas of the SANDF. Their argument mainly centres the fundamental diversity of former forces prior to integration into the SANDF and critically questions whether these diverse and sometimes opposing social paradigms are compatible in managing the SANDF effectively. In light of these observations by Esterhuysen and Mokoena (2018), Mashike (2007); contemporary management arrangements in the SANDF should be viewed against the backdrop of its origins and construct.

### **Management arrangements of the South African National Defence Force vis-à-vis its Constitutional Obligations**

The core function of the SANDF is to prepare, provide and sustain a credible defence capability to defend the territorial integrity of the RSA and its people. (Department of Defence, 2016). The Constitution, 1996 also task the SANDF to perform other missions as MOOTW in the spectrum of conflict (Department of Defence, 2016). This implies that the SANDF must remain combat ready to address a wide range of security threats in the ambit of government's human security policy trajectory. Section 2 pointed out that the SANDF was established in the advent of a non-racial democracy by integrating seven former forces. From the literature we derive that management of the SANDF is based on a continuation of the management practices of the former SADF which were foreign to members of the non-statutory component. In Section 3 we analyse management functions in the SANDF to determine how the management of the SANDF influences its ability to execute its Constitutional obligations.

To contextualise the relationship between management arrangements of the SANDF and its Constitutional obligations we examined the SANDF's combat readiness trajectory since its establishment. In 1994 the SANDF was ranked as the largest, most modern, and structurally sophisticated military force in Southern Africa and arguably in Africa (Winkates, 2000). The combat capability of the SANDF is currently rated as the 39<sup>th</sup> largest/strongest defence force in the world out of 137 ranked countries; and 3<sup>rd</sup> in Africa after Egypt and Nigeria (BusinessTech, 2019). The challenge is that 28 years after its formation the SANDF is in a serious state of decline and if this adverse situation is not immediately rectified, critical defence capabilities would cease to exist in the near future (Department of Defence, 2016). This disposition provokes critical questions whether the SANDF has the ability to execute its primary and/or secondary functions in accordance with the provisions of the Constitution (Jordaan, 2018). The concerns predominately centre on the premise that the absence of a credible defence capability renders South Africa vulnerable (Heinecken, 2019; Jordaan, 2018).

Several authors and institutions like the Defence Review 2015 (Department of Defence, 2016), Mputing (2014) and Neethling (2000) agree that the SANDF is 'in decline' but pungent disagreements prevail like Jordaan (2018) who challenges the conventional arguments about the root cause/s for the decline and what 'public value' the SANDF should provide. The Defence Review 2015 (Department of Defence, 2016) attributes the declining defence capability to obsolete equipment and facilities, unemployable personnel, over commitments and unbalanced defence spending in the ambit of a continuously declining and inadequate defence budget (Department of Defence, 2016; Mitchley, 2018; Mputing, 2014). There is also a school of thought that postulates that the cause of the management dilemma emanates from transformation deficiencies, institutional legacies of the former SADF, the lack of critical institutional capacity and dysfunctional systems and practices that link to the management deficiencies of the SANDF (Booyesen, 2001; Cawthra & Luckham, 2003; Le Roux, 2003). The disagreements normally centres on the application, size, structure, discipline and most important the funding of the force within the ambit of contemporary security and political and social realities (Jordaan, 2018; Mitchley, 2018). This statement is particularly valid when considering observations made by some politicians and the public who more than often use 'a priori' arguments based on assumed principles rather than actual observed facts (Mputing, 2014). The question is whether these debates emanate from a classic example of an information asymmetry (a lack of knowledge) or socio-economic and political paradigms that prevent a coherent understanding of the military realm.

Literature however do reveal that the unfavourable situation in the SANDF is vividly demonstrated in the SANDF's personnel management as a resource in the ambit of a limited defence budget (Cilliers, 2014; Department of Defence, 2016; Mitchley, 2018). There are clear indications that the force levels were vastly inflated in relation to the affordable force design during the integration of the former forces into the SANDF in 1994 (Winkates, 2000). For example, the force levels increased from 84 000 in 1994 to 99 000 by May 1999 whilst the political objective was to reduce the force to 70 000 (Winkates, 2000). Furthermore, the personnel strength also increased despite the defence budget declining from 4.8 percent gross domestic product (GDP) to 1.6 percent GDP over the same period (Winkates, 2000). However, the strategic integration plan did make provision for retrenchment, rationalization, or "right sizing" of the force to an affordable defence capability and in the ambit of a representative demography (White Paper on Defence 1996, 1996). This was to be the final phase of the integration process and was to be finalised by 2000 (Winkates, 2000). This phase did not achieve its goals and the SANDF's personnel to operational funding became unsustainable (Heinecken, 2019). Furthermore, Global Firepower Ranking indicates that the SANDF consists out of a regular and a reserve component which constitutes a personnel strength of approximately 66 300 and 15 000 respectively (BusinessTech, 2019). In contrast, the Defence Review 2015 indicates that the total strength of the SANDF should not be more than 72 000 employees inclusive of Regulars, Reserves and Defence Civilians (Department of Defence, 2016). The implication is that the integration and transformation process has not been completed to 'right size' the force to an affordable defence capability which implies an inability to conform to the intent of strategic plans (Jordaan, 2018). In addition, the planned personnel strength of 72 000 should be aligned to a defence budget of two percent GDP which implies that the SANDF personnel strength is inflated in relation to the current defence budget of less than one percent (Heinecken, 2019). This anomaly also reflects in the structure of the defence expenditure framework where the ideal

expenditure ratio of the defence budget is 40 percent personnel, 30 percent operational costs and 30 percent capital cost (Department of Defence, 2016; Heinecken, 2019). Evidence suggests that the ratio is currently 80:5:15 which support claims that the dysfunctional personnel management reflects in inappropriate expenditure in the SANDF and renders it dysfunctional (Heinecken, 2019).

Prof Lindy Heinecken, one of the leading military sociologists in South Africa, highlights the management deficiencies in the SANDF by the absence of a systems thinking management approach. She argues that from the current force strength of the SANDF is 66,300, only 37 000 is serving in the SA Army who is the core of the current operational design (Heinecken, 2019; Wingrin, 2019). Furthermore, less than half of the 37 000 SA Army personnel serve in 14 Infantry battalions which is the core (main fighting capability) of South Africa's landward defence capability, inclusive of its primary and secondary functions (Department of Defence, 2016; Heinecken, 2019). Therefore, approximately only 28 percent of the SANDF personnel are serving in combat units which implies that the SANDF is support staff heavy and thus unbalanced. Additionally, from this available combat force, 'most personnel' are not deployable because they are old or sick whilst the SANDF failed to rejuvenate successfully (Heinecken, 2019).

The paradox is that the current operational tasks suggest that the SA Army in reality requires 8500 more soldiers to execute its current tasks which vividly illustrates that there is an imbalance in the personnel reality versus operational requirements (Heinecken, 2019). The SA Air Force and the SA Navy, who are more equipment reliant, on the other hand is critically short staffed in terms of technicians to maintain the combat equipment (Wingrin, 2019). The inability to manage personnel strength of the SANDF thus renders the management of its budget unbalanced, "leading to the defence force being labelled a welfare, rather than a warfare agency" (Heinecken, 2019, p. 1). Ultimately, the lack of personnel management implies that the SANDF cannot conform to the provisions of the milestones on the Defence Review 2015 which in turn translates to strategic failure (Louw & Esterhuyse, 2014).

The same adverse situation prevails with main combat equipment, inclusive of vehicles, aircraft and ships (Mitchley, 2018). The SA Army in effect operates with combat and support vehicles from the SADF that was used in the South African Border War (1966 – 1989) and has not been replaced since 1994 (Cilliers, 2014). The SA Army vehicles are therefore more than 29 years old and is subjected to poor serviceability which in turn renders them ineffective. There are several projects registered to replace these obsolete vehicles but has not delivered any meaningful success (Mitchley, 2018). Capital projects like the Infantry Combat Vehicle (ICV) renewal project (Project HOEFYSTER) is to replace the Ratel ICV with the Badger but has been ongoing for many years but did not deliver a single vehicle yet beyond prototypes (Defence Web, 2019). Estimates were that Project HOEFYSTER was to deliver its first of 244 vehicles in 2022, if no further delays were incurred (Defence Web, 2019). This did not materialise, and the objective was not achieved which explicitly points to management deficiencies, not considering the challenges at DENEL as the main manufacturer of military equipment for the SANDF. A similar situation prevails in the SA Air Force and the SA Navy. The SA Navy has three frigates and two submarines that urgently need refits at a cost of R 2.9 billion, whereas that current allocation is only R 223 million which constitutes a deficit of R 2.6 billion. The result is that the SA Navy cannot execute its operational functions (Wingrin, 2019).

Central to most politicians and military leadership's arguments of the underpinning reasons for the decline of the SANDF is the declining defence budget and the detrimental effects it has on the security of South Africa. This situation provokes fears regarding the capability of the SANDF to perform its Constitutional obligations; to protect the country (Jordaan, 2018). The Defence Review 2015 claims that the current defence budget is less than one percent of South Africa's GDP whereas the international norm is two percent (Mitchley, 2018). This implies that according to normative debates, the SANDF is 60 percent underfunded (Mitchley, 2018). The critical challenges central to the argument is whether the current force design and personnel strength is aligned with the affordability of the force and in relation to contemporary security threats, strategies and government funding priorities.

Thus, the debate regarding the weakening defence capability hitherto predominantly centred on the disjunction between an adequate defence budget and an ageing defence force. This notion also supports a normative claim that an inadequate defence budget is the key attribute which prevents the SANDF to rejuvenate and become a credible defence capability (Department of Defence, 2016; Mputing, 2014). Literature however reveals that there are numerous other factors, like misaligned/inadequate training (Esterhuyse et al., 2018), integration and transformation anomalies (Le Roux, 2003; Mashike, 2007), old and dilapidated facilities (Cilliers, 2014) and outdated doctrine (Baker & O'Neill, 2010) all contribute to the current state of the SANDF. There is also literary evidence by Higgs (2000) and Winkates (2000) that indicate that management of the South African defence capability, by implication the SANDF, have been problematic since the formation of the organisation in 1994. It can therefore be deducted that management functions of the SANDF were not aligned with the transformation of the defence capability and requires reconceptualization.

It is evident that the SANDF does have a strategic management process as vividly displayed in the Defence Review 2015 (Department of Defence, 2016). The critical challenge is that the planning seems to be highly theorised and disjunctive from the security and social realities as well as the actual theatre in which the SANDF currently operates (Esterhuyse & Mokoena, 2018). Thus, operational planning unfold as a theoretical exercise with a silo approach whilst limited resources are allocated to objectives that does not support the governmental priority objectives (Esterhuyse et al., 2018; Williams, 2008). Critical observation suggests that whilst management of the SANDF is complex, critical issues do emerge from the array of arguments. This mainly manifest as a void of empirical information regarding fundamentals of management, processes and functions that is critically interlinked by leadership issues that are central to this management symbiosis. In turn, as Figure 2 illustrates, this anomaly translates to a void in understanding the symptoms, root causes and consequences of the current management deficiencies of the South African Defence Force and at what levels and how widespread the perceived management problem is which requires deeper academic exploration.

### **Methods, data, findings, and conclusions of studies on and evaluations of management arrangements in the SANDF**

Thus far we interrogated literature which reveals that management functions are dysfunctional in the SANDF that manifest as the root cause of the decline of the defence capability. In this section we move from understanding the social problem to identifying a possible knowledge gap by examining previous studies that have been attempted in one way or the other to evaluate management arrangements in the SANDF. This is done to determine whether an empirical study is justified regarding management in the SANDF as a researchable subject and whether a knowledge gap do exist (Babbie, 2001; Chilisa & Kawulich, 2012). It is also important to note that modern warfare and security studies is situated in the social sciences but is multi-disciplinary, complex and involves an exploration of numerous other academic disciplines inclusive of in amongst other economics, politics, international relations, governance, sociology, strategy, management and physical sciences (Buzan, 1983; Huntington, 1957; Mintzberg, 2004). Studies of modern warfare, militaries and security studies therefore require a systems management approach and should not be viewed in strict military science disciplines.

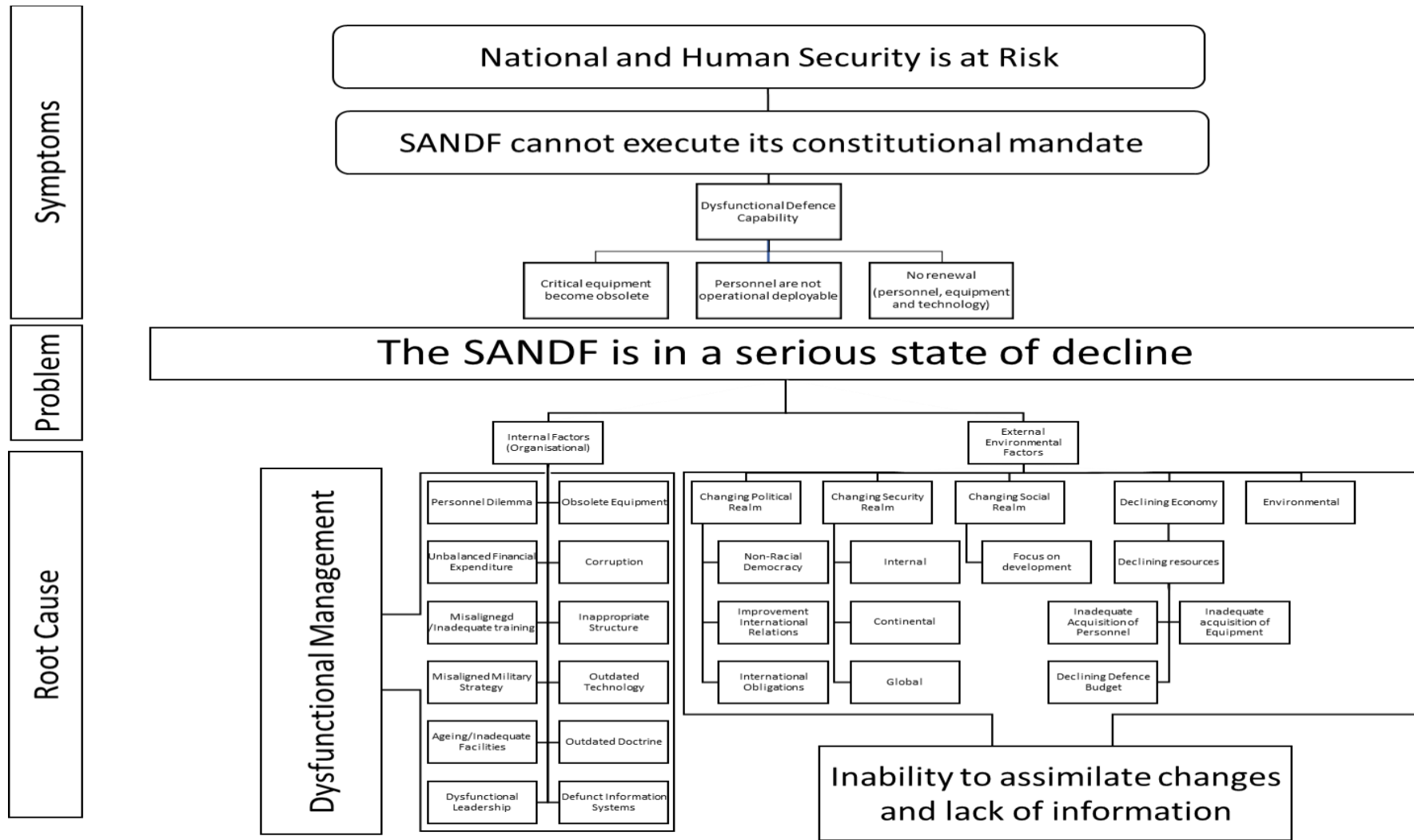
Somehow, the study of the military and war seems to remain on the peripherals of social science despite that war and conflict have a perpetual impact on human security and the human development discourse (Rippenaar-Moses, 2018). This observation proved to be valid in our endeavour to determine a knowledge gap in understanding why management in the SANDF is dysfunctional. We conducted an internet search of the Wits database, e-Journals, the Wired WIREDSpace & WIREDSpace-Extra and the Faculty of Military Science of the University of Stellenbosch's digital library. This search yielded about 40 studies and publications regarding the SANDF. However, literally none rendered sufficient or complete empirical evidence in the context of the intended field of study, being "a comprehensive study of the management arrangements in the SANDF."

Furthermore, those that were more or less in the intended field yielded no empirical evidence and were without exception based on secondary data sources. Sourcing their lists of references had revealed that those were also secondary sources (compilations) of previous studies. This notion confirms previous claims by Prof Esterhuysen from the Faculty of Military Science at the University of Stellenbosch that empirical studies regarding the SANDF are extremely limited. Furthermore, the studies conducted by previous military practitioners' researchers at the Faculty of Military Science at the University of Stellenbosch predominately relates to clinical studies in the art of warfare, leadership, or military history. Paradoxically studies at the School of Governance at the Faculty Law, Commerce and Management centred predominantly on clinical security studies. There are also studies situated at universities in the USA and UK (in amongst others), but they mainly focus on the more conceptual issues of Defence Management; like for example the work of Dr David Chuter (Chuter, 2006).

The absence of previous studies manifests in critically understanding the social problem in context that requires an analysis of previous studies (research problem analysis) in the same knowledge area to explain and interpret the research problem more comprehensively and from where we can articulate the knowledge gap (Babbie, 2001, Wotela, 2016). Thus, the crux of the research problem analysis relates to whether previous studies were conducted in the realm of future research. If so, what guided the previous research in terms of validity, knowledge and values (Chilisa et al., 2012)? Furthermore, what were the research paradigms, philosophical assumptions (epistemology, ontology and axiology), social reality and theory that informed these studies (Chilisa et al., 2012; Creswell, 2009)? Hence, reading and interpreting previous research points out weaknesses (limitations), strongpoints, reliability, credibility, disciplines, consistency, unit of analysis, sampling (size and method), data collection and analysis, variables; but also, what knowledge was contributed by this research (Chilisa et al., 2012). Ultimately it is essential to read, interpret, reflect and evaluate these studies to determine what the outcomes of these studies were in terms of the findings and conclusions of these studies, congruence of the findings with reality; but also, if the findings and conclusions can be generalised to inform the intended study (Creswell, 2009). This is done to determine whether the current study has validity as a researchable subject and whether a knowledge gap do exist (Babbie, 2001; Chilisa et al., 2012).

In our quest to determine a possible knowledge gap, we were able to narrow down the available empirical literature to eight studies that had some significance and that related to the management in the SANDF. We identified 13 themes across different studies as was proposed by Wotela (2017) to conduct research in the field of public and management. We synthesised the themes and conducted a thematic summative content analysis to explore a possible research knowledge gap relating to whether management of the SANDF is dysfunctional and if so, why is it dysfunctional?

Analysing the aim and objectives of previous studies suggested that there is little correlation between the aim and objectives of the intended study and other studies. Thus, situating the intended study in a different knowledge area and supporting claims that empirical knowledge regarding management of SANDF's is limited because previous academic studies failed to explore management of the defence capability as a system. Some of the studies do describe elements of the management in the SANDF and more than often in an implied way instead of exploring management fundamentals, processes, functions and the execution of managerial tasks in pursuance of the SANDF's Constitutional obligations. The Defence Review 2015 (the result of a functional study) (Department of Defence, 2016) seeks to map out the medium term (MT) to long term (LT) defence strategy, other studies mostly focussed on particular components of management like leadership (Muller and Schepers, 2003), anomalies in defence policy formulation (Louw, 2013), and environmental management (Magagula, 2019). Paradoxically, the intended research aims to explore the broader context of management as a critical institutional attribute in the SANDF. Previous studies therefore provide limited empirical evidence that supports the notion that dysfunctional management in the SANDF is the root cause of the decline in the defence capability.



**Figure 2:** Root cause and Consequence analysis of the management dilemma in SANDF

Due to the fact that the aims and objectives of these studies are extremely diverse thereby implying that the strategies, methods, interpretive/theoretical frameworks and research findings have limited correlation with the intended study. Furthermore, analysis strategies, methods, interpretive/theoretical frameworks provided limited results mainly because none of the studies explicitly expressed their interpretive/theoretical frameworks used during the study.

Literature do reveal that Louw (2013) uses the Brooks and Stanley framework for military effectiveness that mainly explains the gap between policy and capabilities by examining how societies, cultures, political structures, and the global environment affect countries' military organisations. The framework has to a large degree a relationship with the intended research but will only explain the external influences and fails to explain why the management practices of the SANDF do not respond to these influences. On the other hand, Malan (1999) uses Burke-Litwen model Muller and Schepers uses the ARPM and SPEEX-index range to interpret leadership exploration. These interpretative frameworks are effective to explain the development of leadership but fails to express the deeper nuances of culture, education and political objectives that are key drivers for effective management. Babbie (2001) states that interpretive/theoretical frameworks familiarise and describes to the researcher which theory exists to explain why the research problem of the intended study occurs. The absence of explicit interpretive/theoretical frameworks in previous research provides restricted or nominal insight to explain relationships between their respective key components, attributes, variables and the outcomes of the research (Wotela, 2016).

A similar situation prevailed in analysing the research designs of the previous studies. Literature reveal that the research design of the previous studies across the board is not well documented thus mostly implied by certain characteristics in the text. Louw (2013) made the best attempt but failed to be comprehensive. Furthermore, Malan (1999), Mandrup (2018) and Muller and Schepers (2003) provided some sort of research design whilst the others were not observed. Due to the absence of comprehensive research designs in the previous studies, it is fairly difficult to determine value, evaluate and critique the previous studies' research designs against the research outcomes and thereby articulating the research knowledge gap. The trend continued whilst analysing the data/information collection instruments of the previous studies, like in previous themes this theme is not well documented across the board, thus mostly implied by certain characteristics in the text. It is observed that the two most popular data/information collection instruments for the previous studies were interviews and questionnaires. Interviews supported a qualitative strategy whilst questionnaires support a quantitative strategy (Creswell, 2003). It is observed that a comprehensive description of the social phenomenon demonstrated a more reliable method to explore and describe the dysfunctional management of the SANDF. Therefore, should be considered as the preferable means of information collection during the intended study.

Analysing previous studies indicated that management of the SANDF is dysfunctional but failed to provide substantial evidence to support the claim through available literature. Neal (2006) further states that defence management is unique and cannot conform to all the principles of management whilst acknowledging that management processes are universal. The challenge is that mainstream managed studies and related academic literature were mainly written for business management and to a lesser extent non profitable organisations (Hellriegel, et al., 2017). Paradoxically, defence forces in general has an inherent and critical difference from any other state department; which manifest as the legal authority to use deadly force to defend to the state and its people (Cleary & McConville, 2006). Thus, by its very nature, defence forces are designed, structured, equipped, staffed and trained to be ultra-aggressive and to use deadly force in reaching their objectives (Cleary et al., 2006). Accordingly, militaries have to function in an extreme complex domain where strategic and operational objectives must be balanced with national strategic (political) objectives (Jordaan, 2018). Thus, to defend the country with deadly force (credible defence capability) but simultaneously be a cost-effective component of the state within the parameters of national strategic objectives, legislation, international laws and funding (Jordaan, 2018). Furthermore, managing a defence capability in a democracy and in a peacetime requires even more finesse because government has developmental priorities and funding is thus limited (Cawthra et al., 2003; Feaver, 1999). The key to balancing this arrangement lies in the ambit of effective management. Previous studies failed to explain the consequences, symptoms and root causes of the social phenomenon. Thus, understanding why management is ineffective remains largely unexplained and provide evidence of an existing knowledge gap to understand management of defence capabilities and suggesting that unique literature needs to be written for defence management. This serves as justification for an empirical study to produce new evidence of management in the SANDF and drafting a thesis that will reconceptualise management as a critical institutional attribute in the SANDF.

### **Research conceptualisation**

Introspecting on the literature we have interrogated on the research problem "why management deficiencies occur in the SANDF" within its physical research context or setting as well as the research knowledge gap. Literary evidence suggest that there is insufficient empirical research data to understand the deeper nuances of the social dilemma, this sections provide for considerations on how one can conceptualise a research on management in the SANDF. Here, we present the proposed draft research problem statement before moving onto the accompanying research purpose statement and then the proposed research questions to a research on management in the SANDF. Analysis of literature in this paper indicated the management deficiencies in the SANDF. Literature nevertheless failed to provide sufficient evidence why this phenomenon occurs and generate the need for an empirical study to explore

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the deeper nuances of the management in the SANDF against the backdrop of a country in transition. Many volumes have been written about management in business and public administration, but McConville (2006) argues that management of defence is unique. She also suggests that studies on defence management is located in Management and Security Studies knowledge areas thus deviate from the traditional management studies.

We are of the opinion that the debate on how to conduct studies in defence management can be conducted in the field of public and management. This postulation is largely answered by Wotela (2017) who states that the basis of a good research report, dissertation or thesis derives from its conceptualisation and is not limited to a specific field of study. From the work of Wotela (2017) we argue that the research strategy and method for conducting research in business and public administration is applicable on research of defence management and to research in the social sciences and humanities. We consequently dedicate this section to discussing conceptualisation of researching the management functions in the SANDF as proposed in Wotela (2017).

Wotela (2017) postulates that research is a structured process and with independent key components that are interlinked, thus requires a system thinking approach (Gharajedaghi, 2006). Furthermore, “research conceptualisation resides in the ‘introduction to the research’ component” Wotela (2019, p. 5) and consists of three concurrent steps to conceptualise the research – that is, (i.) thinking through the research we intend to pursue, (ii.) drafting and reflecting on the draft working research title, and (iii) drafting the working research problem statement, research purpose statement, and the research questions as well as where applicable the accompanying research hypotheses or research propositions. Wotela (2019, pp. 5-6)

We begin with the first component where we discuss which is the research problem statement.

### **Proposed research problem statement**

Belcher (as cited in Wotela, 2019) describe the research problem having two elements being; the ‘general’ statement and the ‘thesis’ statement. The general statement state factual information whilst the thesis statement is debatable to accommodate arguments for and against the thesis statement. We articulated the research problem of exploring why the management in the SANDF is dysfunctional as follows:

The promulgation of the South African Defence Review in 2015 (hereafter called the Defence Review 2015) revealed that the South African National Defence Force is in a serious state of decline (Department of Defence, 2016). The risk is that if government and military leadership fail to rectify this adverse situation, critical defence capabilities would cease to exist in the near future (Department of Defence, 2016). This disposition provokes critical concerns that the absence of a credible defence capability would render South Africa’s security vulnerable (Cilliers, 2014; Mitchley, 2018). Government’s response to this perilous situation is a phased intervention strategy to rebuild the SANDF to a limited warfare capability within a long-term framework (Department of Defence, 2016).

This intervention is based on the military leadership’s claim that the declining defence capability is purely as a result of obsolete equipment, unemployable personnel (due to old age and poor health), unbalanced defence spending and over commitments in the ambit of a continuously declining and inadequate defence budget (Department of Defence, 2016; Mitchley, 2018; Mputing, 2014). This notion also supports the normative claim that an inadequate defence budget of less than one percent of the gross domestic product (GDP), is the key attribute which prevents the SANDF to rejuvenate and become a credible defence capability (Department of Defence, 2016; Mputing, 2014). Thus, the debate regarding the weakening defence capability hitherto predominantly centred on the disjunction between an adequate defence budget and an ageing defence force. However, the notion of an inadequate defence budget as the main reason for the decline of the defence capability is highly contentious and arbitrary exclude management deficiencies within the defence capability as a possible cause. Literary evidence suggests that the current adverse situation in the SANDF is informed by management deficiencies of the defence capability rather than the obvious rhetorical claims made by politicians and the bureaucracy (Esterhuysen A. J., 2013). Literature (Cilliers, 2014, p. 1) reveals that the SANDF is not in a position to execute its constitutional obligations because “it is mired in indecision, endless transformation and an unsustainable use of its existing budget”. These claims support the underpinning reasons that the SANDF’s strategic failure occurs mainly as a result of the organisation’s inability to interpret changing external factors and translate it into ‘realised strategy’ (Louw & Esterhuysen, 2014). This implies that the core of the problem resides in dysfunctional management functions in the SANDF (Cawthra et al., 2003; Cilliers, 2014; Louw et al., 2014).

### **Proposed research purpose statement**

We have discussed and articulated the research problem to understand the research problem within its physical context or setting. Here we articulate the second component being the research purpose statement to position the research by providing the general purpose of the research, ‘what’ we want to explore and ‘how’ we will answer the research question (Wotela, 2019). We articulated the research purpose statement as follows:

The purpose of this research is to explore the root causes why management functions in the South African National Defence Force (SANDF) is claimed to be inefficient within the context of the African military realm; including consequences commonly associated with political transition (Africa et al., 2013). Thus, the aim is to make scholarly a contribution by producing a thesis based on original academic research that intends to articulate a deeper understanding of the complex perspectives of management functions in the South African military milieu (Creswell, 2009). Thereby, trying to close the existing knowledge gap in understanding the deeper

nuances of why management functions in the SANDF is dysfunctional (Jordaan, 2018). Based on the findings, the research should also be able to generalise the findings to reconceptualise effective management of a defence capability in the broader African military realm; including countries commonly associated with political transition (Africa et al., 2013; Creswell, 2009). The foundation of the research is therefore rooted in the philosophy that the SANDF is to ensure human security in the South Africa, then a primary task of the SANDF's commanders and staff is to manage the defence capability effectively in support of government objectives (Jordaan, 2018; McConville, 2006). This can only be achieved through efficient and effective use of available resources within the framework of pragmatic governing policies, fundamental systems management and management processes of the defence capability (McConville, 2006).

More specifically, the main aim of this research is to establish the extent to which the absence of a systems thinking approach contributes to management deficiencies in the South African National Defence Force (SANDF) and, therefore, hindering its provision of a credible defence capability in accordance with its Constitutional obligation. The three corresponding objectives are to establish (i.) the extent to which the absence of a systems thinking approach in applying Fayol's management functions (planning, organisation, leading, and control) contribute to the management deficiencies in the SANDF, (ii.) the extent to which the distinct SANDF military characteristics and traditions prevents it from functioning effectively in a complex environment, and (iii.) the extent to which the organisational legacies of the former SADF contribute to disregarding a system thinking management approach in the SANDF. We shall use the aim of this research to conceptualise its main research question and the accompanying objectives to conceptualise the secondary research questions. The latter will guide us through the collection, collation, processing, and analysis of empirical research data and information to get to grips with this research (Wotela, 2019).

### **Proposed 'Research strategy, design, procedure and methods**

The context analysis, research problem analysis, and the research knowledge gap analysis constitute the first three sub-components of the introduction to research in public and management research (Wotela, 2019). It provided a premise that points out 'what' research we intend to pursue and 'why' (Wotela, 2019). In Section 5.4 we propose a possible research strategy, design, procedure and methods that will realise the purpose of the research. We therefore argue that the analysis of the physical research context and research problem suggest that an academic study with a qualitative strategy, conducted as a case study and with a grounded theory research design could provide a rich description of the social phenomenon. Thus, providing an understanding why the decline of the defence capability persists (Bryman, 2004; Chilisa, et al., 2012; Nieuwenhuis et al., 2012).

Creswell (2009) states that philosophical assumptions (ontology, epistemology, axiology) and social science theories are critical components of the interpretive frameworks in academic studies because it positions the research and intellectual thinking that guides the researcher in understanding assumptions and perspective in the research process. The intended research should therefore be informed by relevant philosophical assumptions that underpins a qualitative research strategy (Chilisa, et al., 2012). The epistemological assumptions manifest in an interpretive approach, and the ontological assumptions manifest in a constructivist approach (Chilisa *et al.*, 2012). An interpretive approach provides social research techniques that enable the researcher to understand socially constructed realities (Chilisa, et al., 2012) of integration of the former forces to establish the SANDF, post-Apartheid defence policies (Cawthra et al., 2003; Mills, 2011) and strategic objectives (Jordaan, 2018), and the deeper nuances of management of the SANDF in a non-racial democracy (Cawthra et al., 2003; Mills, 2011). In contrast, a positivist approach, emanating from a quantitative research strategy, would only assess the cause-and-effect relationship regarding the disjunction but not succeed to provide a deeper understanding of the phenomena in the research context (Chilisa, et al., 2012). Concurrently, constructivism enables the researcher to understand that knowledge is subjective, hence; the different actors perceive the disjunction within a cultural, ethical, political, organisational, and historical paradigm (Chilisa, et al., 2012).

Lastly, the anticipated methodological limitation of studying the SANDF centres on two limitations to this research that might impede on the ability to bridge the knowledge gap. The first being that some civil servants central to the research (members of the SANDF) may not wish to be interviewed due to bureaucracy regulations and the fear that they might be exposed to retribution. Secondly, information contained in restricted documents that might be required to support/oppose arguments might not always be available due to the sensitivity of the information.

### **Proposed interpretive frameworks**

We conclude the conceptualisation of the research by proposing interpretive frameworks that would realise the purpose of the research. Therefore, the research should endeavour to reconceptualise a system management approach to applying management functions as a critical attribute in the SANDF to provide a credible defence capability. This would be achieved by exploring (Berniker & McNabb, 2006) the root causes why the application of management functions in the South African National Defence Force (SANDF) is ineffective. In order to conform to the purpose and objectives of the study, we propose that research should conduct a case study (Creswell, 2009) using a qualitative research strategy (Wagner, Botha, & Mentz, 2012). Whilst philosophical paradigms provide the position of the research in normative social science, theories provides the critical attributes that will link the thesis to normative social science theories (Creswell, 2009) associated with fundamentals of management (Hellriegel, et al., 2017), security studies (Buzan, 1983; Huntington, 1957), governance (Du Pisani, 2007; Fukayama, 2001), and the theory of change (Ehlers & Lazenboy, 2010); all of which is vital for understanding the effective management of a military capability (the SANDF) in a country in transition and in the African milieu.

## Conclusions

Literary evidence reveals that the SANDF fails to provide a credible defence capability and suggests that the underlying reason for the deterioration is underpinned by management deficiencies in the SANDF. The management deficiencies manifests as its inability to adapt its strategies, right sizing, over tasking, resource allocation and its outputs in relation to government priorities. This paper presents an argument that research of a systems management approach is critical to understand “why” management deficiencies exist within SANDF. Therefore, the intended research should be conducted beyond a literature review. Thereby stimulating debate and providing a premise from where management in the SANDF can be conceptualised against the backdrop of a country in transition. We therefore postulate that understanding the deeper nuances of management of the defence capability can be engineered by conducting empirical research in the public and management research area as proposed by Wotela (2017). To achieve this objective, we employ a structured and systems approach to research that overcomes the shortcomings of previous attempts. We have conceptualised this research by first describing the research context, followed by a research problem analysis that sets us up to identify the knowledge gap.

Whilst we acknowledge that the past research efforts attempted to explore elements management of the SANDF, none of the studies considered a systems management approach in applying Fayol’s management functions in the SANDF. This disposition is exacerbated by the fact that there is an obvious lack of research and debate regarding management of the SANDF. In our intended exploration of management deficiencies in the SANDF, we restrict ourselves to exploring the absence in systems thinking approach in applying management functions in the SANDF. This provides for understanding the deeper nuances why this anomaly exists. The study, when complete, intends to provide new knowledge to the management field of study with specific reference to the effective systems management of a military capability within a complex systems domain and a country in transition.

This interrogation provides the foundation to conceptualise this research. We conclude that utilising the proposed research strategy, methods and interpretive frameworks will provide a foundation to conduct an empirical study that should unlock the ‘why’ management of the SANDF is perceived to be ineffective and thereby contribute to the particular knowledge area where previous studies failed. To this end the three research questions are articulated in supporting the main research question to answer the research problem. Fundamentally, the research questions centres on three critical aspects. First the absence of system management approach in applying Fayol’s management functions (planning, organisation, leading, and control) contribute to the dysfunctional management of the SANDF. Secondly, the influence of stringent military characteristics on the managing of the SANDF as part of a liberal democracy, and lastly to what extend the persisting influence of the former SADF has on the current management deficiencies in the SANDF. To this end, the main and subordinate research question intends to address the research problem to understand the deeper nuances of the management deficiencies in the SANDF.

## Acknowledgement

**Author Contributions:** Conceptualization, K.W., M.D.R.; methodology, K.W., Validation, K.W., M.D.R.; formal analysis, M.D.R.; investigation, M.D.R.; resources, K.W., M.D.R.; writing—original draft preparation, M.D.R.; writing—review and editing, K.W. All authors have read and agreed to the published version of the manuscript.

**Informed Consent Statement:** Not applicable.

**Data Availability Statement:** Not applicable.

**Conflicts of Interest:** The authors declare no conflict of interest.

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