THEORETICAL APPROACHES IN INTERNATIONAL RELATIONS: THE SOUTH AFRICAN MILITARY AS A FOREIGN POLICY INSTRUMENT

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Abstract

The utility of theoretical approaches in international relations can be found in the fact that such approaches provide 'lenses' that can be applied to enhance our understanding of the social dynamics of the world we live in. Theoretical approaches are also instrumental in shaping perceptions of what matters in international politics as a social activity. At least indirectly, such approaches inform the choices made by decision-makers on foreign policy and related defence planning. The aim of this article is to revisit those theoretical approaches in international relations that underlie security studies, and to evaluate the relevance of the approaches with regard to a scholarly understanding of militaries and specifically their roles and functions in a foreign policy context. The latter pertains to militaries in general but also to the South African military in particular regarding its role and function as a foreign policy instrument of the South African government.

Introduction

Conventional wisdom holds that militaries as instruments of foreign policy are only to be used when other instruments (e.g. diplomacy or economic means) have failed. This implies that, as a technique of last resort, the military instrument involves the use of armed force. Moreover, in the post-Cold War international system (specifically in the 1990s), it was often contended in political circles that the utility of military means was of decreasing importance.[1]

In the case of South Africa particularly, political developments around the historical transition of 1994 deliberately placed limitations on and reduced the use of the

military instrument. This coincided with the adoption and consolidation of a new foreign policy framework in the early 1990s, which commenced in earnest after the change of government in April 1994. It also coincided with a reformulated and non-partisan value synthesis and was especially evident in a redefined view of South Africa's global position and a reformulation of the national interests. In this context, the reduced role of the military was instrumental in the introduction of a foreign policy that revived diplomacy and regionalism to denote a break with the previous era of regional destabilisation by the apartheid government and its military. In other words, in contrast to the pre-1994 position that was characterised by regional isolation, unilateralism, militarisation and the primacy of the military instrument, South Africa's post-1994 policy – at least in principle – moved towards a position of international participation, regional co-operation, multilateralism and the primacy of the diplomatic instrument in the country's foreign policy.

Yet, towards the end of the 1990s, a re-emergence of the military instrument in South African foreign policy was clearly the order of the day, albeit in a limited and qualified manner. This means that the South African National Defence Force (SANDF) gradually re-appeared as a role player of significance and clearly featured as a more important although not a dominant fixture of South African foreign policy. This was primarily the result of a new appreciation of South Africa's national interests and an increasing political need to contend with the prevalence of unacceptable levels of regional conflict and instability, specifically from an international and regional peacekeeping perspective. Since regional peace and security became cornerstones of South African foreign policy, new opportunities opened up for the extension of the ancillary use of defence diplomacy.[2]

Twenty years into a democratic constitutional order, the SANDF is a unique instrument of power at the disposal of the South African government. The SANDF, whose capabilities must be commensurate with the country's international status, strategic posture and inescapable continental leadership role, is required to make "a vital and unique contribution that complements South Africa's diplomatic efforts and enhances South Africa's influence within wider international developments".[3] In positioning the country to meet these demands, the political decision-makers as well as the SANDF's planners and strategists must determine the ways, as well as the conditions, under which military force will be applied to pursue national strategic interests and ultimately attain governmental objectives. The current South African defence planning debates and related processes are dominated by analyses, perspectives and interpretations of the recently tabled *2014 South African Defence Review*, as this document is paramount to the current and future roles, functions and force design of the SANDF.

In a scholarly context, theoretical approaches in international relations (IR) are useful to develop a better understanding of how militaries in various contexts are used as foreign policy instruments and how militaries' roles and functions are politically influenced or determined. This is also true of the SANDF as a foreign policy instrument of the South African government. In view of the above, this article reports on the utility of the major theoretical approaches in IR in understanding the role and functions of the SANDF as a military instrument.

Background

Defence planning and decisions on strategic matters are complex and require the consideration of and insight into a wide variety of factors and dynamics. The military instrument of power has traditionally been viewed and accepted as one of the four primary instruments of state power and foreign policy, the other three being diplomacy, economic techniques (ranging from sanctions to foreign aid) and psychological techniques (propaganda).[4] These instruments of state power are usually applied in combination with one another, and it is commonly accepted that the military should be applied as a last resort, depending on the situation.[5] The military instrument of power comprises many permutations across the spectrum of conflict and can be applied in a variety of deployment types such as collaboration, defence diplomacy, coercion and engagement. These variations in deployment types demand sufficient institutional flexibility in the structures of militaries to be configured and equipped optimally to meet the challenges presented by the various types of deployments. The ability of states to achieve national security policy aims will therefore also largely depend on whether and how well their militaries adapt to changing strategic, political, budgetary and technological environments.[6]

IR scholars continually formulate and develop concepts, paradigms, models and theories in a bid to explain the complexities of the prevailing international security environment, as well as the actors functioning in the international security landscape. It is commonly accepted that the theories and concepts associated with social sciences and IR as a discipline (in the field of political sciences) cannot provide definitive 'cause-and-effect' answers to the complex issues related to the study of human relations. However, they provide particular insights into and perspectives on the social environment that condition our understanding of the social world.[7] The utility of theoretical approaches in IR can be found in the fact that they provide 'lenses' that can be applied to enhance our understanding of the social dynamics of the world we live in.

The development of the post-apartheid South African defence policy as well as the planning and strategising processes of the Department of Defence (DOD) and the SANDF has, since the start of democracy in 1994, been dominated by the quest for establishing and maintaining a defence force which, as part of the broader security sector landscape, would be relevant to the contemporary as well as the future conflict and threat environment. This requires of the defence force to be appropriately structured and prepared to be successfully applied as a 'tool' in the foreign relations 'tool box' – along with the other instruments of foreign policy, namely diplomacy, economic cooperation, information exchange and social networking. Great emphasis has been placed on the development of South African defence policy and on the definition of the 'defence function' in a modern democratic African state. The importance of this is clear from the fact that the South African Minister of Defence and Military Veterans in July 2011 constituted a high-profile Defence Review Committee and mandated it to look critically at South Africa's defence policy once again. This review of defence matters stems from the rapid and fundamental changes that have occurred in the strategic environment over the last number of years and the reality of the SANDF increasingly falling out of step with specific reference to its "roles and mission sets assigned by the government to the defence force".[8]

Theoretical approaches in IR and their relevance to the South African military

IR theories differ in their scope and scale. As theories, they are basically intellectual frameworks comprising interrelated values and assumptions. In IR, these theories comprise broad approaches to the analysis of world affairs, each of which constitutes a distinctive 'lens' on world affairs.[9] The question can be raised as to how, and if, theoretical approaches in IR can contribute to an improved understanding of the role and functions of militaries. There are concrete or specific theories, such as Realism, but not even realist theories guarantee a clear and accurate analysis of foreign policy.[10] Moreover, Vale points to the frequently posed question of whether the military should not be deemed to fall outside the domain of social theory, given that "they [due to the unique nature of their role and function] operate in an averred 'real', rather than feigned, state of exception".[11]

Upon scrutiny, one can certainly find arguments for the role of theories and their relevance in the argument about theoretical lenses to explain military developments and other events. Steve Smith, as quoted by Bilgin, states that "theories do not simply explain or predict: "They tell us what possibilities exist for human actions and intervention and define not merely our explanatory possibilities,

but also our ethical and political horizons".[12] Theories can therefore identify the processes through which ideas are reified into institutions and then treated as reality, because they reject an objectivist conception of the theory–practice relationship and instead view theory itself as constitutive of the very reality it seeks to explain.[13] Theories, should therefore, not be accepted as 'truths'; they merely provide us with particular 'optics' or frameworks for analysis that can enable us to have a better and deeper understanding of the world in which we live. Vale also reminds us that, while theory assists us to view the social world, it also makes us realise the limitations of that which we know.[14]

The sections that follow provide a brief consideration of some of the most prominent theoretical approaches in IR that inform and underpin security studies, specifically with a view to applying these approaches to the roles and functions of the SANDF as a foreign policy instrument.

The Realist approach

Perhaps the most pervasive assumptions underlying security studies are those that are associated with the theoretical approach of what is generally known as 'Realism'. It is impossible to discuss Realism in relation to all its ideas, attitudes and nuances in this article, but suffice to say that Realism is a school of IR theory that prioritises national interests, competition, security and state power as central in shaping the way in which states interact with one another. Realists contend that the international system and security environment are the most important determinants of state behaviour. They also believe that states act independently of each other and that their sovereignty should be deemed as sacred.[15] Realists therefore view power and competition to be the currency of international politics and argue that global dynamics are dominated by states that act in the pursuance of self-interest and the quest for power.[16]

It is impossible to summarise the body of ideas and orientations associated with Realism in IR, but classical realists generally accept a world subdivided into independent sovereign states as being the order of the day, if not the permanent condition of the international community. They are sceptical about the possibilities of permanent peace, and perhaps the main reasons why realists entertain minimal expectations of state behaviour can be linked to their conceptions of human nature. Human nature is viewed as inherently destructive, selfish, competitive and aggressive, and the international system is torn by conflict and full of uncertainty and disorder, and is thus anarchic.[17]

Buzan explains anarchy in Realism as follows: "Since the claim of sovereignty automatically denies recognition of any higher political authority, a system of sovereign states is by definition structured as anarchy."[18] The importance that is ascribed to the sovereignty of states perpetuates and reinforces the anarchic international system by the actions of individual states that are intent on maintaining their independence and sovereignty. Although the quest for and maintenance of individual state sovereignty contribute to the maintenance of the anarchic international system, this quest and maintenance also ensure that states remain self-sufficient and competitive in their relations towards each other.[19] In such an anarchical, self-help system, states are inevitably preoccupied with national security, sovereignty, territorial integrity and the utility of military power.[20] According to realists, it is therefore the anarchic and competitive nature of the international system that generate imperatives for state action. This, in turn, compels modern states to balance power externally through alliance formation and internally through mobilisation and military organisation.[21] In most cases, military power is considered to be one of the most tangible manifestations of state power. Realists therefore argue that competition for power is part and parcel of the anarchic international system. In the anarchical world of Realism, conflict is therefore inevitable, leaving states with no escape from the threat of war.[22] Realists, consequently, are preoccupied with maintaining national security against external military threats, the primary focus of most militaries. By and large, this outlook reinforces the focus upon the primary role of militaries – that of fighting regular wars against peer or near-peer opponents.

A readiness for regular warfighting continues to serve as a general underpinning for the military preparedness of modern armed forces in the early 21st century. However, this realist–warfighting interface is not uncontested. Despite the continued importance of military power, Buzan points to empirical evidence that indicates that the growing pressure of global interdependence among states is mitigating the risks of violent conflict between national states, and therefore changing realists' view of both the world and the use of military force.[23] Due to changes brought about in the international security environment, the classic realist view as described above was altered in order to describe the application of state power in a new multi-polar world order accurately. This process has resulted in the new permutations of the classical Realism theory, namely 'Neorealism' or 'Structural Realism'.[24]

Without expanding on the variants of realist theorising in a present-day context, contemporary Neorealism is mostly associated with the work of Kenneth Waltz and his publication, *Theory of international politics* (1997). Waltz's work continues to emphasise the dominance and importance of the national state and the

anarchic nature of the international system. However, Neorealism no longer presents the uncontrollable human quest for power as the driving force in the behaviour of states in the international system. Instead, neorealists are convinced that it is the very structure of the international system, whether bipolar, unipolar of multipolar, that most affects state behaviour and choices made by governments.[25] The abilities of states to deftly employ the respective elements of state power as a holistic and focused manifestation of state craft in the context of the international political system will ultimately determine a state's position and standing in this international structure. For armed forces, this shift reinforces notions of a defence policy moulding armed forces to become adept for employment alongside other elements of state power and confinement to primarily warfighting roles.

As far as Realism and defence policy are concerned, one could argue that in terms of realist perspectives, the military dimension of foreign policy is conceived of in rather narrow military and national security dimensions. According to Schoeman, this perspective on the role of the state deems the national security of a state as the most important foreign policy goal and requires the military to protect the sovereignty and territorial integrity of the state. This, in turn, implies that states must be able to apply the military instrument of power in the event that coercive measures are required in defence of the country.[26]

Notwithstanding the universal utility and value of classical Realism, the essentially narrow definition of the concepts of security and defence has proved to be misaligned with broader, more holistic post-Cold War conceptualisations of peace and security. The broadening and deepening of the post-Cold War understanding of security has resulted in new conceptualisations, such as human security and the responsibility to protect.[27] In other words, the post-Cold War era has for the past few decades borne witness to a shift in emphasis away from the state-centric security perspective as described above, to that of a holistic and inclusive conceptualisation in support of broader human security objectives. In the case of South Africa, the primary function of warfighting in defence of state sovereignty remained paramount in the priorities attributed to the SANDF by the 1996 White Paper on Defence.[a] Over time and reaching a culminating point in 2011, operational realities forced a revisit of the primacy of the realist–warfighting strands in defence policy. As political calls for and deployments towards secondary or non-

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[a] Also known under the title 'Defence in a Democracy: White Paper on National Defence for the Republic of South Africa, May 1996', See Self Defence, Chapter 5.

conventional roles continued to grow, so did the realisation for an updated defence review.

In the South African context, there is a continued acknowledgement of realist leanings in international state behaviour in general, as is evident from the 2014 South African Defence Review.[28]

> Conflict and war has mostly been the result of states pursuing their interests to the detriment and insecurity of others… Although political and economic integration has made progress in recent years, states jealously guard their national sovereignty and territorial integrity, and will continue to secure and protect these through the maintenance of powerful military capabilities. Significantly, military power continues to be exercised alongside both economic and political power. While most states in the post-cold war era have reduced their military spending, some have strengthened and expanded their conventional capacity, allowing traditional major powers to sustain their military dominance. Accordingly, military strength continues to provide powerful states with the means to embark on unilateral acts of force and even armed aggression in pursuit of their own national interests.

Yet, one can hardly describe or label South Africa's foreign policy and defence planning as explicitly or even largely realist. In fact, observers such as Human Rights Watch argue that sudden policy shifts in the South African government's foreign outlook were evident since 1994, apparently driven by differing or swaying views within its cabinet. Specifically, this relates to realist assessments of the country's immediate political and economic interests on the one hand, and liberal views premised on human rights considerations on the other.[29]

In this context, it would be inaccurate and oversimplified to place South Africa in any particular theoretical categorisation regarding its defence policy preferences. Although section 200(2) of the Constitution places the emphasis on the role of the defence force as primarily in defence of the national security of the country, section 201 – against the background of the preamble, which underlies the core principles of the country's foreign policy – also allows for involvement in international peace missions as part of South Africa's international obligations. Since 1994, South Africa's foreign policy can be characterised as a "foreign policy of peace"[30] – which is primarily associated with a theoretical approach in IR, known as Idealism/Liberalism.

Idealism/Liberalism

Realism has always been challenged by the contending theoretical approach of Idealism, which provides a very different point of view to the processes involved in defence planning and the military as a foreign policy instrument. Since its formulation after World War II, the theory of Idealism, originating from the older tradition of Liberalism, has always been divergent in its views on international politics.[31] This theoretical approach supposes that individuals have rational qualities and the conviction that humans, despite their self-interest, are able to cooperate and construct a more peaceful and harmonious society. Idealism thus places emphasis on the importance of actors other than the state in international relations. Because of this, Idealism is often described as antithetical to Realism. This notion is, however, not very correct. Immanuel Kant,[b] the philosopher whose political thought was shaped by the central importance of morality (which is key in how liberals see global politics), accepted Thomas Hobbes' realist description of conflict among states, but also went far beyond Hobbes' description. Kant envisaged that the respective members of the 'pacific state' (pacific union of liberal states) would maintain their sovereignty, but that membership would be oriented to internationally and domestically improving cooperation, economic interdependence and the acceptance that international law and organisations will be applied to overcome the challenges posed by the international system.[32]

In brief, Idealism is generally accepted as a liberal attitude or course of action that opposes all established forms of authority considered as restrictive to individual freedom and social progress. Idealism has always accentuated the importance of liberty, equality and common destiny among individuals, and prioritises the pursuit of principle over the need for power.[33]

Idealists view war and conflict as international risks that demand collective or multilateral intervention to mitigate their devastating effects or to prevent risks from occurring at all. For idealists, the solution to war and conflict is to be found in the mobilisation of the international society to eliminate those institutions that make war possible.[34] International organisations, such as the United Nations (UN) and the North Atlantic Treaty Organisation (NATO), or even international regimes such as

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[b] Some scholars argue that liberals misunderstood Kant and that he should not be cited in the liberal school of IR theory. However, the present study considers him for his treatise on "Perpetual peace", which today can serve as the essential norm of behaviour for states, especially the major powers, within the world arena.

the Bretton Woods system, and the General Agreement on Tariffs and Trade, were created, both to maintain a balance of power, as well as to regularise cooperation between nations.[35] Liberal thinking in international relations reached its high-water mark during the interwar period of the 20th century, as liberal thinking was founded on the notion that warfare is an unnecessary and outmoded way of settling disputes between states. With the birth of the UN, liberalism again influenced policy-making elites and public opinion in a number of states after World War II – although these flames of hope were soon extinguished by the return of the Cold War politics. However, after the Cold War, there was a resurgence of Liberalism as Western state leaders proclaimed a new world order.[36]

While realists focus on war and peace, the central focus of idealists is cooperation. For some years at least, the relevance of Idealism for South African foreign policy was that the post-1994 South African government made a serious attempt not to present itself as a regional hegemon – even though the country has always been perceived as such and has been expected to take a leading role in the economic and security situation on the continent. The post-1994 South African government has thus been favoured by the benefits and burdened with the downside of its economic profile on the continent. In this regard, circumstances have increasingly forced South Africa to take on a leadership role in resolving national or regional problems, and once having addressed these, to subsequently assist the continent in managing its development challenges.[37] This also had a significant effect on the roles and functions of the SANDF since 1994. The SANDF was expected to pursue peaceful relations with other states and maintain a defensive posture while avoiding "any aggressive intentions" towards any other states.[38] At the same time, the SANDF had to be mindful of government's acknowledgement that domestic and international expectations had grown steadily regarding South Africa's role as a responsible and respected member of the international community and that these expectations included "a hope that South Africa will play a leading role in international peace missions".[39]

Alden and Schoeman contend that South Africa is currently exercising a stronger hand in continental affairs, which relates to its leadership role as mediator-integrator, bridge, anti-imperialist agent, developer, and regional leader and protector on the continent. This role is now finding expression in a stronger hand in continental leadership and a more assertive foreign policy, which can be traced to a number of initiatives that were initiated in 1999 under the Mbeki presidency.[40] On the one hand, this suggests a realist leaning in South Africa's foreign policy outlook in terms of the country projecting itself as a regional leader. On the other hand, it also suggests that South Africa is willing to exercise a leadership role in a

multinational context in the framework of liberalism, specifically neoliberal institutionalism, which concentrates on the role of international institutions and actors in mitigating conflict. Both these projections hold implications for the country's armed forces. More realism or more liberalism with its accompanying impact entails matters to be resolved through considered adjustment and contemplation of their wider impact on South Africa's defence policy.

As far as defence policy is concerned, South Africa's leaning towards Idealism has been expressed in a number of important post-1994 policy documents. Importantly, the *1998 South African Defence Review* committed the SANDF to multilateral and regional security cooperation within the Southern African Development Community (SADC) as a particular priority (Chapter 4 of the Defence Review), but also within the ambit of international law and related conventions and treaties (Chapter 1). The 1998 Defence Review further explicitly committed the SANDF to international cooperation and participation in the field of multinational peace support operations (Chapter 5).[41] This leaning towards Idealism is also observable in the following and more recent pronouncement in the South African Defence Review 2014.[42]

> South Africa's foreign policy, shaped by its own domestic priorities, seeks a 'better Africa in a better world'. Economic integration, development, peace and security are cornerstones of this policy. South Africa will thus continue to support regional and continental conflict resolution, strengthen regional integration, significantly increase intra-African trade and champion sustainable development. South Africa's engagement with other states will be one of peaceful relations, adherence to international law on armed conflict and in pursuit of international treaties to which it is party. South Africa recognises that development and stability are inextricably linked and mutually reinforcing, hence the commitment to the promotion of continental and regional security … South Africa also remains committed to the international systems of global governance for the promotion and protection of human rights through equal emphasis on civil, political, social, economic and cultural rights.

Nathan correctly argues that South Africa's foreign policy outlook might sometimes appear as "incongruous behaviour by a democratic country whose foreign policy encompasses the promotion of human rights", especially in view of the fact that South Africa's stance provoked international dismay and criticism when it made an attempt to stand in the way of UN censure of states such as Zimbabwe,

Sudan and Burma/Myanmar. One way to understand this is to explain South Africa's position in terms of the theoretical approach of Constructivism, which boils down to the centrality of particular ideas in South Africa's foreign policy. In this regard, South Africa's principled solidarity with African governments and the anti-imperialist worldview carries a special significance.[43] The next section on Constructivism and the Copenhagen school discusses the role of ideas more fully.

Constructivism and the Copenhagen school

Constructivism has become one of the major schools of thought within the Postmodernist IR discourse since the late 1980s and early 1990s.[44] Constructivism was first mentioned by Nicholas Onuf in his book *World of our making* in 1989, and the concept of Constructivism has since acquired considerable significance in the study of international relations. Franke points out that within little over a decade, constructivism had risen to become one of the top three paradigms in the discipline. Constructivism should not, however, be viewed as a monolithic theory, but should rather be understood as a theoretical framework that has been ascribed to a wide variety of approaches to international relations ranging from Alexander Wendt's scientific Realism to post-structural constructivism.[45] In addition to analyses about security, Constructivism has also been applied to other issues such as political economy and international organisations. In fact, McDonald points out that, despite the attention given to some security issues, the extent to which constructivists have developed a theory of international security is limited. This tendency distinguishes constructivists from Critical theorists (as discussed in the next section) who define security in terms of its commitment to emancipation as well as realists who view the world through the lens of power politics, states and competition.[46]

In the discipline of IR, Constructivism supports the notion that significant aspects of international relations are determined by historical events and social issues rather than by inevitable outcomes of human nature or other essential characteristics of world politics and power. The central, shared assumption of constructivist approaches to security is that security is a social construction.[47]

Essentially, constructivists argue that the world is constituted socially through inter-subjective interaction, that role players and structures are mutually constituted, and that conceptual factors such as norms, identity and ideas are generally central to the composition and dynamics of world politics.[48] Constructivists argue that understanding how actors develop their interests is of importance and key to explaining international phenomena. This further means that

"interest formation" centres on the social identities of states or other relevant actors. In brief, identities inform interests, which in turn inform actions.[49]

In formulating foreign policy, constructivists argue that, although it might seem self-evident that foreign policy should serve to defend and advance national interests, the nature of these interests are not self-evident and they do not derive simply from a state's objective place in the international world order or system. Rather, a country's national interests are socially derived and historically contingent, reflecting an interpretation of the world and the country's place in that world.[50]

While the realist–liberal institutionalist debate has been primarily concerned with studying the barriers to cooperation, constructivists concentrate on how, under certain conditions, transnational forces and state interactions can cooperate and are able to generate the trust, reciprocity, shared knowledge and common identities necessary to transform global politics and overcome Hobbesian 'anarchy'.[51] Alexander Wendt rejects the realist notion that egoistic state behaviour is independent of time, place and culture and that states are unable to surmount the security dilemma because it is embedded in the state system.[52] Constructivists argue that an actor shapes his/her own social context of shared values and norms, and that these in turn shape the actor's interests, identity and behaviour (actions and interactions as expounded in a state's foreign policy). These actions and interactions are based on international and domestic rules, norms and values.[53]

Constructivism thus offers useful (alternative) theoretical views and perspectives to analyse and explain current developments in international affairs. First, the usefulness of constructivism lies in the fact that it explains change by focusing on the power of ideas (such as values, norms and rules) in defining ranges of actions and interactions between states. Ideas have, in fact, been pivotal in shaping the vision, goals and strategies of South Africa's foreign policy. In view of the above, Nathan explains that ideas have shaped, and continue to shape, South Africa's global vision and foreign policy goals. The latter is specifically associated with the African Renaissance, anti-imperialism and equitable global relations, as well as ethical and normative principles such as human rights and the adherence to international law. Nathan further argues that the claim that ideas are determinants of foreign policy does not imply that ideas are more important than interests in shaping foreign policy. He maintains that since "ideas and interests are dichotomous", the linkages and interfaces between ideas and interests should be valued as fertile grounds for empirical investigation and theoretical reflection when seeking to find explanations for decisions on government policies and the varied responses of different countries to common problems.[54]

In this context, the 2014 South African Defence Review makes it clear that South Africa's evolving international endeavours "recognises two canons", namely Pan-Africanism and South–South solidarity, and that the country's national security is rooted in:[55]

- an understanding of South Africa being integrally part of Africa, striving for African unity and integration, and African prosperity; and
- South–South solidarity as a firm opposition to colonialism and neo-colonialism in all their forms.

Within the above framework or paradigm, South Africa also actively supports and pursues regional and continental processes that aim at responding to and resolving crises on the continent and beyond.[56]

The open and process-oriented approach of Constructivism can account for the general intensification of security cooperation initiatives across the globe, of which the interactions in the European Union (EU) and the African Union (AU) are examples. Franke explains that Constructivism was developed in part to overcome the inability of rationalist approaches to explain collective action, including the resolution of security dilemmas. Constructivism goes much further than the dominant theories of security cooperation in portraying international relations as social constructs susceptible to limitless reformulation over time rather than as static concepts fixed to definable and unchanging conditions. In analysing the current international security environment, the Constructivist approach offers a useful theoretical lens through which to examine new evolutionary patterns of international relations, as well as their institutional manifestations.[57]

Constructivism can be considered as a source for the post-modern movement in IR, and some have gone so far as to attribute the rise of cultural studies to Constructivism. This approach has given rise to several theories and frameworks for theoretical analysis that focus on the role of factors pertaining to norms and identity, the social construction of world politics, as well as on the development of theories or frameworks and schools of thought for the study of security in the Constructivist tradition. One of these schools of thought has come to be known as the Copenhagen School of Security Studies, which merits specific attention.

The 'Copenhagen School' was a label given to the collective research agenda of various academics at the (now defunct) Copenhagen Peace Research Institute in Denmark, centred on the work of Barry Buzan, Ole Wæver and Jaap de Wilde. The proponents of the Copenhagen School of thought support the arguments regarding international relations first posed by Barry Buzan in his book *People, states and fear: The national security problem in international relations*, published

in 1983. This was followed by Buzan, Wæver and De Wilde's collaborative work, *Security: A new framework for analysis,* in 1998,[58] which is still widely regarded as the key statement on the Copenhagen School's approach to security. The intent of the supporters of this school of thought was not initially aimed at developing an alternative theory or framework for the study of security. The concepts and cases related to the Copenhagen School evolved over time and it was only later that the observations and arguments about the operation of security in Europe were presented as a separate framework for analysis. The core theme that supporters of the Copenhagen School pursue is the quest for finding answers to how security works in world politics. This was an important quest as the realities of the post-Cold War security environment demanded reassessments and a broadening of our conceptualisations of security.

The Copenhagen School's approach, which developed in the context of the post-Cold War era, called for the broadening of definitions of security that sought to include a range of pressing and neglected concerns such as environmental change, poverty and human rights on state security agendas. The Copenhagen School simultaneously contributed to these calls for a broadening of the concept and attempted to place analytical limits on it. At the same time, the proponents of the Copenhagen School have not attempted to develop a framework for how security should be defined or how key actors should approach external security dynamics or crises.[59]

According to McDonald, the Copenhagen School focused on how security itself is given meaning through inter-subjective processes and, to a lesser extent, which political effect these security constructions have. Buzan and Wæver have suggested three central concepts of security, namely sectors, regional security complexes and securitisation.[60] Of these concepts, the notion of regional security complexes might be of special relevance to an understanding of South African foreign policy and defence planning.

First published in *People, states and fear: An agenda for international security studies in the post-Cold War world,* Buzan's main argument holds that security complexes of a region are held together not by the positive influences of shared interests but by shared rivalries. Security complexes link states together to the extent that their national securities cannot realistically be considered apart from one another. This amounts to regions and subsystems of security relations among a range of states whose fate is that their locations lock them into some form of geographical proximity with each other. Relationships could be based on genuine friendship as well as on expectations of protection and support. Security complexes

are exposed to four major types of threats and interactions: balance of power contests, lingering conflicts that emerge between neighbouring states, conflicts that arise from transnational threats (e.g. political Islam and international terrorists) and intra-state conflicts. Security complexes are practically defined in terms of mutually exclusive geographic regions such as Europe, the Americas, Asia, the Middle East and Africa.[61]

Buzan's conceptual framework on security complexes can certainly provide explanatory value and meaningful insight when applied to South Africa's foreign policy approach and related defence planning as far as specific defence policy pronouncements are concerned, such as that –

> [s]ecurity is promoted by the AU Peace and Security Council (PSC) through timely and effective response to conflicts and crises in Africa … South Africa will intensify its engagements in the AU and its structures towards building African security and the social and economic development of the continent.[62]

Clearly, South Africa realises, and values the factor of regionalism and directs its foreign policy towards friendship, protection and support with its neighbours, as outlined by Buzan. Buzan's arguments on security complexes likewise provide interesting insights into and serve to highlight the relevance of theory with reference to the following point of departure in the 2014 South African Defence Review regarding the occurrence of intra-state conflict in the developing world in general and African states in particular:

> The vast majority of armed conflicts occur within states, rather than between them. Such intra-state conflicts will continue to feature prominently in the underdeveloped and developing worlds, due to reasons including political intolerance, competition for resources, ineffective governance, corruption, extreme poverty and underdevelopment … Although occurring within states, intra-state conflicts also negatively affect inter-state relations. The consequences of such conflicts in terms of displaced persons, refugees, the trafficking of small arms and light weapons, and the disruption of transport hubs and trade will have profound spill-over effects on neighbouring states.[63]

To this end, the pursuit of joint procurement programmes in the SADC region is regarded as an important initiative from South Africa's perspective and much value is attached to the acquisition of inter-operable equipment as a stepping

stone to regional interoperability. A functional SADC Standby Force is also regarded as of major importance[64] with obvious implications to the SANDF and its defence planning.

Lastly, Marxism and Critical Theory also deserve attention even if it might appear that Marxist theorising is of little or no importance to matters of foreign policy and defence planning in South Africa or further afield.

Marxism and Critical Theory

During discussions about international relations and politics, Marxism is often dismissed as being preoccupied with economics, rather than with politics. After all, Karl Marx essentially identified the relations of production as the fundamental root of the world system. In this context, audiences often perceive Marxism as primarily focusing on domestic rather than international social relations. Rupert argues that this is not an accurate description of the Marxist paradigm and its value, and that the paradigm should rather be understood as a theoretical approach that aims to provide a critical understanding of capitalism as a particular historical way of organising social life. This form of social organisation entails political, cultural and economic aspects, which need to be understood as a dynamic ensemble of social relations not necessarily contained within the territorial boundaries of nation states, but with an international character and influence that transcend national borders.[65] Accordingly, Marxism can yield valuable insights when applied as a lens to provide an alternative view on complex social relationships at all levels – and, ultimately, international relations.

The Frankfurt School of Western Marxism refers to a group of theorists who were originally associated with the Institute for Social Research at Frankfurt University in the early 1920s. This institute was established with the aim of developing Marxist studies in Germany. This school of thought is the original source of what came to be known as 'Critical Theory'. Today, the proponents of this school of thought in some ways continue to promote the spirit of the Marxian critique of the disabling effects of the modern capitalist system, but in other ways they diverge from the mainstream formulae of Marxism.[66] Much of the Frankfurt School of Critical Theory takes critique to involve the uncovering or emancipation of 'humanity' whose autonomy and freedom are bound by ideology.[67] This shift in thought was prompted by some theorists who lost faith in the revolutionary potential of the working class against the background of the triumphs of fascism and the integration of labour into the capitalist system in democratic capitalist countries.[68] In addition to the latter, the Frankfurt School also saw how the Soviet Union was

transformed by a rigid doctrine of economic determinism. Supporters of the Frankfurt School wanted to retain a critical and potentially progressive role for social theory, but were wary of the preoccupation of orthodox Marxism with production and the corresponding emphasis on the historic role of the proletariat.[69]

The Welsh School, also known as the Aberystwyth School, rose to prominence in the early 1990s. The Aberystwyth School was associated with 'emancipatory Realism'[70] and relied upon insights from the Frankfurt School in linking security to Critical Theory. This school of thought based its work on that of the Italian political theorist and activist, Antonio Gramsci (1891–1937), whose paradigm differentiated between Critical Theory and problem-solving theory. Gramsci argued that the difference between the two theories was to be found in the purpose for which theory is built. Critical Theory, on the one hand, is presented as a theory that "stands apart from the prevailing order and asks how that order came about". Problem-solving theory, on the other hand, accepts the status quo and is content with focusing on fixing the anomalies in the prevailing system to make existing relationships and institutions work smoothly.[71] Bilgin points out that the differences between these two theories should not be over-simplified and limited to conclusions that Critical Theory merely dismisses the realities or the problems experienced in the security realm. Neither should it be assumed that Critical Theory merely presents a criticism of problem-solving theories.[72] Critical Theory engages with present problems, but does so against the background and in the context of the historical processes that have produced such problems, while also proposing alternatives that constitute feasible transformation of the existing world.[73]

The Aberystwyth School moved away from statism that treats the state as the ultimate referent object and agent of security to include other referent objects beyond the state.[74] The Aberystwyth School also provides for the broadening of the current understanding of security in order to consider a range of insecurities faced by an array of referent objects. In this sense, according to Booth, proponents of Critical Theory do not securitise issues, but politicise security. This is done to reveal the political and constitutive character of security thinking and to change conceptions about the military and state-focused threats that have dominated traditional security agendas.[75] Proponents of the Aberystwyth School thus redefined the concept of security as a derivative concept and call for politicising security. The politicising of security allows for a questioning of how state elites use security and the merits of policies based on zero-sum, statist and militaristic understandings.[76]

There are concrete or specific theories, such as Realism, which informs the analysis of foreign policy and defence planning, but Marxist and Critical theorists do

not express themselves explicitly on such matters. Their approach and scholarly work serve as a constant reminder that the possibilities of social transformation – and defence planning by implication – should be done through the "development of alternative social orders". Thus, imaginative defence planning cannot and should not merely be about problem solving within the status quo, but should be approached and carried out in fundamental ways that sometimes go beyond "the confirmation and explanation of the current world".[77]

Furthermore, Marxist and Critical Theory can be usefully applied in the analysis of the South African political landscape during and after the apartheid regime. The period between 1948 and 1994 was dominated by the National Party's apartheid regime that was centred on the assumptions of white supremacy. The South African government at the time presented the country's security in terms of Western security – a term that was used to cloak the interests of the ruling white minority. As a result, the security strategy that the National Party adopted was one of forward defence, which was designed to overpower potential threats at home and in the neighbouring region; thus, upholding the status quo and solving problems within the existing framework. Critical theory, in turn, recognised apartheid for what it was – "just another idea reified into being through intersubjective understandings and coalescing practices".[78] Supporters of Critical Theory viewed South African security as being conditional upon a non-racial and freely elected government that would seek security not at the expense of, but together with its people and its neighbours.[79] Critical Theory laid bare the ways in which beliefs or paradigms about white supremacy had facilitated the formation of the apartheid regime and the related policies that maintained the status quo. It also proposed alternative policies that eventually contributed to the ending of apartheid.[80]

According to Vale, Marxist Theory and Critical Theory are still important to South African military planners, not only for the role that Marxism or anti-Marxist views of the apartheid regime played in shaping or defining South African military thought, but also because Marx opened up our understanding of social processes and highlighted the opportunities for social change, which is crucial to the successful development of the South African state.[81] Marxism further provides an alternative perspective to statist understandings of security, which manifest in the tendency to treat it as an end condition, rather than as a process through which human beings establish and build relationships with others to find ways of coexistence without depriving others. Marx's work should therefore be evaluated and valued as a useful framework for alternative views on our traditional conceptualisations of security that were essentially centred on state security or statism.[82]

Lastly, in the South African defence context, critical theorists are inclined to question existing policies or measures as entrance points for future defence planning. They also view any conventional reading or understanding of the social world critically and this critical view extends to defence planners who uncritically accept existing policies or policy tools as entrance points for defence planning. For some critical theorists, this means, for example, to consider defence planning through feminist lenses in order to gain a more critical perspective and in the words of Vale, "… this is just one of the many challenges that social theory presents to professors of military studies".[83] Practically, some observers have indeed been critical from the viewpoint that the first draft of the 2014 South African Defence Review did not mainstream gender into defence policy and thus failed to integrate gender into the major issues discussed in the document[84] − which clearly illustrates the aforementioned approach of critical theorists as centred on the development of alternative social orders.

Evaluation and conclusion

The aim of this article was to report on the utility of the major theoretical approaches in IR in understanding the role and functions of the SANDF as a military instrument. Although there are significant variations among theoretical approaches in IR and their points of departure, they are useful to explain international relations and cannot be regarded as mere academic curiosities. These theoretical frameworks, directly or indirectly, shape perceptions of what matters in international relations as a social activity. At least indirectly, they also inform the choices taken by decision-makers on foreign policy and defence planning.[85] Despite their inherent shortcomings, these frameworks continue to influence current defence and security debates and, ultimately, theoretical approaches in IR provide useful constructs that can be applied to evaluate defence thinking in relation to contemporary threat environments.

In light of the above analysis of the prevailing issues that affect government decision-making, it appears that the policy directions of governments are not only determined by state-centric pursuance of interests (as purported by realists), but that ideas and norms also play important roles in the decisions made by governments. It is evident that South Africa's foreign policy is influenced by the ideas around the promotion of African solidarity or Pan-Africanism and the pursuance of equitable global relations. However, assuming or accepting the point that ideas and norms shape the formulation of foreign and other government policies does not imply that they are more important than issues related to interests as drivers of foreign policy.

Both ideas and interests influence the formulation of policy as drivers of policy writing and are therefore not dichotomous. Nathan rightly argues that particularly the linkages between ideas and interests should be analysed in terms of their influence on foreign and other policies.[86]

Habib points out that existing literature on foreign policy strategies suggests that regional powers, such as South Africa, adopt a number of strategies based on a variety of perspectives, and not necessarily from one dominating theoretical approach or perspective. Regional powers can adopt foreign policy ranging from hard and soft power, to bandwagoning, buffering, binding and niche diplomacy. Case studies from different contexts have also demonstrated that strategies of regional powers cannot be defined in simple categorisations.[87]

This makes defence planning for regional powers such as South Africa one of the most challenging functions of government. Generically, defence planning is premised on an appreciation of the international security environment and the global, social, economic and military forces at work. Defence planning takes into account long-term national and security objectives, and economic factors. In other words, defence planning is essentially a subset of overall national planning in the political, economic and social spheres. It also takes into account the philosophy and ethos animating the national psyche, and is thus shaped by the historical and cultural forces of nations.[88] The aforementioned is also germane to defence planning in the South African context. In this regard, theoretical approaches in IR are useful to enhance a better understanding of how the South African military as a foreign policy instrument needs to operate and plan for various contexts that range from the identification of security threats and contingencies to operating in the diplomatic context as part of the country's comprehensive foreign policy practice on the continent and beyond.

It should be clear that the aforementioned theoretical approaches underpinning the analysis of South Africa's foreign policy and related use of the military instrument of power as foreign policy instrument must be understood in terms of recognising the position or ability of states to pursue multiple strategic orientations simultaneously.[89] Since 1994, South Africa's foreign policy has continuously exhibited great flexibility and occasionally demonstrated (neo)realist leanings, while at the same time promoting (neo)liberal and constructivist orientations in accordance with the country's pursuance of the African agenda. This vacillation between (neo)realist and (neo)liberal stances, coupled with identity and normative orientations in South Africa's foreign policy – and the influence thereof on defence planning – is typical of developing states that aim to find the balance

between promoting and preserving national interests while they simultaneously seek to promote contemporary international norms. In view of the above, theoretical perspectives in the discipline of IR can greatly contribute to a better scholarly understanding of defence planning in South Africa, as well as the role and functions of the SANDF as a foreign policy instrument on the African continent and beyond.

In sum, it should be clear that constructivist-related factors such as identity, norms and ideas became central to South Africa's foreign policy in the post-1994 context. These factors not only shaped the vision, goals and strategies of South Africa's foreign policy, but also affected defence planning, and they continue to influence defence dynamics and related debates. Furthermore, South Africa's defence policy and force deployments reflect shifting government preferences as far as the employment of the military instrument is concerned. In the post-1994 period, stark realist-driven thought on the role of armed forces gradually became a low-keyed policy option, although the primary function of warfighting in defence of state sovereignty remains paramount in the priorities attributed to the SANDF by the 1996 White Paper on Defence. The waning of a realist orientation emerged from a key debate to set out defence in a democracy and to keep in step with the international trend where dominant thought for some time framed the military option as one with little utility in an ever-changing security landscape. In this regard, there was some balance between the declaratory and operational profiles regulating the role of the SANDF as a policy instrument. Thus, as the 21st century commenced, a more idealist-driven employment of the SANDF as a policy instrument emerged with the role of the military growing surprisingly prominent through its secondary roles to promote conflict resolution in international peace missions in Africa.

After the first decade of the 21st century, the SANDF has become an even more important or salient part of South Africa's foreign policy initiatives into Africa, specifically as part of UN peacekeeping operations. Most recently, the role of the SANDF was especially evident in the so-called Battle of Bangui (2013), the creation and operations of a Rapid Intervention Brigade in the DR Congo (2013/14) and its current lead role in the African Capacity for Immediate Response to Crises (ACIRC), which is intended to offer a temporary multinational African interventionist standby force. These salient military-driven policy expressions reveal a more assertive drive in South Africa's foreign policy initiatives, and developments therefore seem to be swaying towards (neo)realism as a paradigm with its lingering undertones of national interests.

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