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ARTICLES

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Editorial

The months since our last issue, published in June 2025, have revealed significant transformations in the international security environment, characterised by protracted armed conflicts, evolving alliances, and accelerated military modernisation efforts. Escalating hostilities in Europe and the Middle East, alongside persistent instabilities in Africa and the Asia-Pacific, have strained diplomatic frameworks and heightened the risk of wide-ranging confrontations. Concurrently, record levels of defence spending and advancements in hybrid capabilities underscore multipolar competition, where state and non-state actors increasingly exploit technology to pursue strategic objectives. Recent sources portray a world in which traditional alliances contend with emerging coalitions, hybrid threats proliferate, and nuclear postures evolve in ways that challenge existing arms control regimes.¹ This overview reports on key developments across regions and themes, emphasising their implications for international stability, and the scholarly discourse on military affairs.

Armed conflicts persisted as a central concern, with the Russia–Ukraine War still demonstrating attritional warfare amid evolving international support on both sides. Russian advances in eastern Ukraine, particularly around Pokrovsk and Kharkiv, reflected a strategy of incremental gains.² By late August, Ukrainian responses, including drone strikes on Russian refineries, had disrupted approximately 17 per cent of the Russian refining capacity around Moscow, leading to regional fuel shortages. The integration of foreign forces and the suspension of specific United States (US) aid packages under the new Trump administration highlighted uncertainties in Western commitments, even as European nations assumed greater roles in coordination through groups, such as the Ukraine Defence Contact Group.³ Diplomatic efforts, such as US–Russian talks in August and postponed summits in October, aimed at ceasefires, but encountered obstacles over territorial concessions and enforcement of sanctions.⁴

In the Middle East, instability arose from ongoing hostilities. The fragile truce between Israel and Hezbollah endured intermittent violations through airstrikes in Lebanon, driven by Israeli impatience regarding the disarmament of Hezbollah. At the same time, Iranian procurement of sodium perchlorate from China enabled round-the-clock missile production, exacerbating fears of renewed confrontations with Israel.⁵ The collapse of the Assad government in Syria in late 2024 created vacuums that persisted into 2025, with groups, such as Hayat Tahrir al-Sham (HTS), influencing transitional processes amid Israeli strikes and Turkish pressures on Kurdish forces. Under President Ahmed al-Saraa, leader of the HTS (and formerly designated as a terrorist leader), Syria joined the US-led international coalition against the Islamic State group, and strengthened political and economic ties with the United States, shortly after the United Nations (UN) Security Council had lifted economic sanctions on Syria.⁶ Gaza saw continued incidents of Israeli

attacks, with humanitarian gestures, such as the return of the remains of Palestinians, juxtaposed against settler violence and infrastructure damage.⁷ These dynamics not only strained regional alliances but also intersected with global energy security, as Houthis maritime attacks continued to disrupt shipping lanes.⁸

Asia-Pacific security challenges manifest in territorial disputes and militant activity. Clashes in the South China Sea, including a mid-October incident near Pag-asa Island where a Chinese coastguard ship rammed a Philippine fisheries vessel, underscored assertive maritime claims, and prompted reaffirmations of US defence obligations.⁹ Border tensions between Afghanistan and Pakistan escalated with Tehrik-e-Taliban Pakistan attacks and cross-border airstrikes, culminating in a ceasefire mediated by Qatar and Turkey, although new militant factions emerged.¹⁰ In Myanmar, a Chinese-brokered truce between the ruling military junta (known as the Tatmadaw) and the Ta'ang National Liberation Army (TNLA) enabled the Tatmadaw to redirect troops, equipment, and resources from the stabilised northern Shan State front to other active conflict zones across the country.¹¹ Violence in the Indonesian Papua region involved deadly confrontations between separatists and security forces.¹² North Korean ballistic missile launches and troop contributions to Russia further destabilised the Korean Peninsula, signalling deepening ties with Moscow.¹³

Currently, Africa faces over 50 active armed conflicts, which represents an approximate 45 per cent increase over the last five years, aggravating humanitarian crises on the continent.¹⁴ African developments revealed multifaceted instability, with the Sudan civil war reaching a pivotal moment through the capture of el-Fasher by the Rapid Support Forces in late October, displacing thousands and intensifying humanitarian needs.¹⁵ In Mali, the Al Qaeda-linked group, JNIM,¹⁶ continues its siege of the capital Bamako, cutting off fuel supplies, and applying increasing pressure on the military junta in its search for legitimacy – raising the risk of another military coup.¹⁷ Jihadist rivalries in Nigeria claimed around 200 lives, while piracy resurged in Somalia.¹⁸ These events amplified calls for external intervention.

Broader thematic trends include surging military expenditures and arms modernisation. Global spending reached \$2,7 trillion in 2024, with projections for 2025 indicating continued growth, particularly in Europe, where North Atlantic Treaty Organisation (NATO) members, such as Poland and Romania, exceeded targets.¹⁹ Nuclear forces expanded, with the Chinese arsenal nearing 600 warheads, and Russia modernising its strategic nuclear forces and updating its doctrine. Arms transfers remained robust, dominated by the United States and France, while non-state actors accessed advanced drones and missiles.²⁰ The European Union Defence Readiness Roadmap and the NATO Hague Summit resolutions emphasised collective capabilities, including rapid troop movements and the integration of artificial intelligence (AI) into warfare.²¹

Hybrid threats, encompassing cyber intrusions and drone incursions, gained prominence. The authorisation of drone shoot-downs by Belgium in response to suspected Russian activities exemplified defensive postures, while global discussions on AI ethics advanced through UN resolutions.²² Environmental and health security intersected with military affairs, as outbreaks and natural disasters strained operational capacities, such as typhoons

that affected military readiness in the Philippines and Vietnam.²³ These developments collectively signal a fragile international order, where diplomatic avenues have to counterbalance military escalations to foster stability. Against this backdrop of evolving global security dynamics, the contributions in this issue of *Scientia Militaria* offer timely perspectives that resonate with contemporary challenges.

This second regular issue for the year reports on the multifaceted dimensions of military history, psychology, law, foreign policy, and security reforms, offering a bridge between historical legacies and contemporary defence challenges in South Africa and beyond. By integrating archaeological insights with modern operational resilience, procurement regulations, diplomatic dynamics, and institutional rivalries, the contributions underscore the interdisciplinary nature of military scholarship. This collection not only advances understanding of specific contexts but also highlights broader implications for policy and practice in an evolving global security landscape.

Building on historical perspectives, the first article is authored by Anton C van Vollenhoven, an extraordinary professor of History at North-West University. With over 35 years of research experience, his primary focus lies in the archaeology of the Anglo-Boer War. This contribution examines Steinaecker's Horse, a volunteer unit aligned with British forces during the Anglo-Boer War (1899–1902). Comprising local Lowveld inhabitants – including Swazi, Pedi, and Shangane individuals – alongside a minority of British soldiers, the unit operated in the Lowveld and Swaziland to intercept Boer communications with supporters in Portuguese East Africa. Several outposts were established to facilitate this objective. Recent investigations have addressed the scarcity of historical sources through archaeological excavations, yielding artefacts that illustrate soldiers' daily lives, environmental adaptations, and interactions with indigenous communities. This archaeological lens not only reconstructs historical events but also reveals social dynamics in colonial warfare. With this research, Van Vollenhoven contributes to a nuanced understanding of multicultural military engagements.

Shifting from historical archaeology to contemporary psychological dimensions, the second article is by Charles H van Wijk, a clinical psychologist practising in Simon's Town, South Africa, and a research fellow in the Department of Industrial Psychology at the Stellenbosch University Faculty of Military Science. His prior work examined adaptation to isolated, confined, and extreme environments. Here, he discusses psychological readiness as a pivotal element for mission success and personnel well-being in the South African Navy. The investigation reported on here particularly addressed the demanding submarine context. Key factors are robust clinical mental health, adaptability, and integration with support systems. The study centred on the aftermath of the SAS *Manthatisi* accident in September 2023. In his research, Van Wijk analysed submariners' resilience and associated risk-protective factors. The findings underscore the necessity of rigorous pre-service selection, ongoing screenings, and prompt interventions to sustain operational readiness. Insights from this event highlight the value of resilient individuals capable of rapid recovery. The study concluded that sustained psychological support and resilience cultivation are essential for submariner efficacy. This work extends beyond naval operations, as it offers broad applications for high-stress occupational environments.



Transitioning to legal frameworks, the third article is by Ernst Heydenrych. He serves as Academic and Quality Manager in the Faculty of Law at Boston City Campus and as research fellow in the Department of Mercantile and Public Law at the Stellenbosch University Faculty of Military Science. Derived from his LLD dissertation under Geo Quinot and Michelle Nel, this article summarises and extends the fourth chapter of Heydenrych's dissertation. Although public procurement research in South Africa is prevalent, defence procurement remains understudied despite its fiscal and operational significance. This gap is alarming amid extensive discretion granted to contracting authorities and endemic fraud, corruption, and irregularities within the Department of Defence and the South African National Defence Force. The article delineates "acquisition" and "procurement" as distinct forms. It identifies challenges, such as persistent budget reductions, cost containment, delays, and corruption. The article also evaluates the *Public Procurement Act* (No. 28 of 2024). Recommendations advocate for robust policy implementation to eradicate malpractices, build capacity, and ensure legal compliance. These steps optimise system efficiency. By proposing combined assurance mechanisms for accountability, Heydenrych's contribution addresses oversight deficiencies, and fosters a resilient defence sector aligned with national priorities.

Moving to the diplomatic arena, the fourth article is by Riaan Eksteen, a research associate in the Department of Political Studies and Governance at the University of the Free State Faculty of Humanities. This article scrutinises South African foreign policy amid the shifting dynamics of President Donald Trump's second term. South Africa has grappled with adapting to these changes, profoundly influenced by domestic realities. The assertive negotiations and prioritisation of economic, national, and security interests of the Trump administration have strained global partnerships. The "America First" doctrine prompted withdrawals from commitments, affecting bilateral ties. Exacerbated by the South African incomplete understanding of US political nuances, policy divergences have led to misinterpretations. Notable escalations include the March 2025 declaration of the South African ambassador as persona non grata and tariff impositions, with potential congressional sanctions looming. While relations may evolve, current ambiguities persist. The analysis emphasises informed engagement and comprehensive political comprehension. It further provides critical lessons for navigating superpower influences in African diplomacy.

Concluding with regional security analyses, the final article is by Mokete Pherudi, a research fellow at the Centre for Gender and African Studies within the Faculty of Humanities at the University of the Free State. Post-Cold War and independence-era reforms bolstered security apparatuses across nations. These reforms included the Lesotho Defence Force (LDF), the Lesotho Mounted Police Service (LMPS), and the National Security Service. These initiatives intensified tensions between the LDF and LMPS. The tensions evolved into rivalry after the 1966 independence and impeded mandate fulfilment. Pherudi examined the origins of conflict, including intra-LDF divisions, manifestations, remedial measures, and governance repercussions. Recommendations advocate for inclusive reforms to promote stability and collaboration. These reforms address politicisation and enhance institutional efficacy. The study demonstrated the perils of securitised politics, and the findings offer pathways for sustainable African governance.

Scientia Militaria takes pride in this rigorous, diverse assemblage of articles, spanning temporal and thematic spectra. The issue culminates in five book reviews by Fanga Agbor Martial, J David Thompson, Craig Bailie, Hussein Solomon and Piet Bester. The journal is grateful to the efforts of these authors, the peer reviewers, book publishers and reviewers. Engagement through reading, critique, and new article submissions advances collective innovation in military and security studies, reinforcing the role of the journal in scholarly discourse.

The Editors

Anri Delport  & *Evert Jordaan* 

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The Archaeology of the Outposts of Steinaecker's Horse, a British Volunteer Unit during the Anglo-Boer War (1899-1902)

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Abstract

Steinaecker's Horse was a volunteer unit which fought on the side of the British during the Anglo-Boer War. The members of the unit consisted of local inhabitants of the Lowveld (now part of Mpumalanga) including Swazi, Pedi, and Shangane soldiers, but a few British soldiers joined their ranks. They operated in the Lowveld and Swaziland with the main aim of preventing the Boers from contacting supporters in Portuguese East Africa. The unit established a number of outposts for this purpose. The history of Steinaecker's Horse has been studied over the past few years. Historical sources on the unit are scarce and thus they were supplemented by archaeological excavations. The artefacts excavated provide information about the lifestyle and everyday circumstances of the soldiers, as well as their interaction with local people. It seems that outposts were placed close to existing communities, probably so that these people could be employed as scouts, servants, cooks, and hunters. Together with artefacts linked to British soldiers, such as ammunition and porcelain, objects linked to local people have been identified at all sites. These include ceramic pottery, glass beads and traditional weapons. Furthermore, the amount of faunal remains excavated at these outposts indicate that the inhabitants supplemented their diet by eating game. Since most of the occupations held by members of Steinaecker's Horse before the war are known, some of the excavated artefacts can be linked to such professions, which may have served the unit. This includes inter alia tailors, barbers, blacksmiths, cooks, and musicians.

Keywords: Steinaecker's Horse; Anglo-Boer War; Lowveld; Archaeology; Outposts; Daily activities; Lifestyle; Artefacts

Introduction

The Anglo-Boer War (also called the Boer War or the South African War)¹ has frequently been studied by historians. The war took place between 1899 and 1902 and was fought between the British Empire and the two Boer republics, Transvaal (Zuid-Afrikaansche Republiek) and the Orange Free State.² The purpose of the article is not to discuss the war, but to focus on the volunteer unit, Steinaecker's Horse, specifically from an archaeological perspective. During the war, little time was actually spent on warlike activities such as fighting by Steinaecker's Horse. The question therefore is how the soldiers spent their time in between any military encounters in which they may have been engaged. The hypothesis of this study was thus to determine the lifestyle, daily activities, and everyday circumstances at the different outposts of the Steinaecker's Horse Unit. This can be

mostly determined from the cultural material excavated at these sites, although the limited historical sources available also provided information. The aim of the article is thus to provide a reconstruction of activities engaged in at the different outposts of Steinaecker's Horse, as can be established from archaeological material.

Background

A short background on the unit is necessary. After the British forces captured the capital of the Transvaal, Pretoria, on 5 June 1900, fortified posts were established at tactical points all over South Africa. The purpose thereof was to protect routes such as railway lines and roads and other tactical points.³ This included the area known as the Lowveld, of what was then called the Eastern Transvaal (now Mpumalanga). The main aim of fortifications here was to guard communication routes, especially the Eastern Railway Line between the Transvaal and the Portuguese territory.⁴ For this purpose, the British erected several blockhouses along the railway line.⁵

On 24 September 1900 General R Pole-Carew reached Komatipoort on the border with the Portuguese territory. This resulted in the evacuation of all Boer positions near the Portuguese frontier,⁶ with the British stationing a garrison at Komatipoort to patrol the eastern border. Here several forts were erected by the Steinaecker's Horse Unit,⁷ a volunteer military unit operating in the Lowveld and Swaziland.⁸ The fortifications consist of one fort, five blockhouses and at least four sangars.⁹ The unit was under the command of Francis Christian Ludwig von Steinaecker (Figure 1), a former Prussian-German soldier with vast military experience.¹⁰



Figure 1: Lieutenant-Colonel FCL von Steinaecker.¹¹

Before the war he resided in Port Shepstone (now in KwaZulu-Natal) and when the war broke out, he joined the Colonial Scouts.¹² Early in 1900 he persuaded General RH Buller to allow him and a number of men to blow up the Komatipoort railway bridge in order to restrict the movement of the Boers. Although they did not succeed, a culvert close to Malelane was demolished and the campaign was thus regarded as being a success. This impressed Buller, who allowed Von Steinaecker to raise a voluntary unit named Steinaecker's Horse. The main aim of the unit was to patrol the Portuguese border.¹³ Steinaecker's Horse was officially established on 7 November 1900.¹⁴

The unit eventually had a strength of 450 men mainly consisting of local people from the Lowveld. It included British subjects and Boer citizens, as well as people from countries like Germany, the USA and Australia, but a number of regular British soldiers also joined the unit.¹⁵ Von Steinaecker remained the commanding officer of Steinaecker's Horse for the duration of the war. The unit was only disbanded after the war, on 17 February 1903.¹⁶

Historical information on the role of Steinaecker's Horse during the War

It is necessary to discuss the operations of the unit during the war, as obtained from archival and other historical sources, as it provides insight into the nature of their activities and offers context to the life at such an outpost. As not much information could be obtained, a full account is provided.

Even before officially establishing the unit, Von Steinaecker and the few men he had with him raided stores and villages in the area. None of the sources indicate why this was done, but presumably it was to obtain goods or simply a result of petty crime. Looting was nevertheless frequently carried out by the British soldiers.¹⁷ Goods were for instance also taken by Von Steinaecker and his men from Ringler's store close to Komatipoort on 13 October 1900. It is said that Colonel Von Steinaecker told Ringler that he was neutral during the war as he was a German subject. This was a lie as he was a naturalised British citizen. They found weapons, ammunition and three horses, which Ringler admitted belonged to Boers, as well as two full Transvaal State Artillery uniforms. As Ringler was an outspoken pro-Boer he was captured and later deported.¹⁸

Early in 1901 the unit became known as Steinaecker's Horse.¹⁹ Von Steinaecker made his base at Nomahasha in Swaziland (now called Eswatini). In March of that year the unit raided Bremersdorp (now Manzini in Eswatini) and captured eight Boers, as well as some wagons and supplies.²⁰ A detachment of the corps stayed in the town until 24 July 1901 when the town was besieged by the Boer commando of General Tobias Smuts and Hans Grobler.²¹

Von Steinaecker, being warned of the coming attack, fled the town the previous night, leaving his men to defend the village as best they could. He however failed to nominate a detachment commander. Captain HO Webstock, who was in charge of the town detachment, claimed the honour, but was overruled by Captain AD Greenhill-Gardyne, who was detached to Steinaecker's Horse from the Gordon Highlanders and who was the only officer with regular military experience. Under conflicting instructions, Steinaecker's Horse retreated during the night of 22/23 July 1901, after which the Boers captured the

town. The Boers burned the small town and released a Swazi prince held by Steinaecker's Horse.²² During the attack four members of Steinaecker's Horse were killed, four wounded and seventeen taken prisoner. Captain Greenhill-Gardyne, second-in-command of the unit, managed to escape with the rest of the men.²³

It seems that Steinaecker's Horse was reputedly engaged in controversial activities, such as looting.²⁴ This was aimed at local inhabitants, including farmers and stores. A safe full of jewels was for instance looted from Bremersdorp.²⁵ Another incident was that of money taken from a store owner, Mr Gustav Schwab, who had stores in both Bremersdorp and Oshoek.²⁶ The unit also raided various settlements, including Hhohho and Oshoek. They burgled the store of George Hutchinson and in the process burned important historical documents regarding the history of Swaziland. The store of BB Stewart at the foot of the Ngwenya range was also raided by them and a large amount of money stolen from him.²⁷

The unit regularly confiscated livestock from local farmers, especially herds of cattle.²⁸ Sergeant Harry Wolhuter indicates how they took possession of a herd of cattle belonging to a prominent Boer leader, Abel Erasmus, and took it to one of their outposts, Sabi Bridge.²⁹ Once they even confiscated cattle on the Portuguese side of the border, which was a contravention of international treaties. The Portuguese Governor complained to the British, who then had to compensate the owners.³⁰

Officially both the Boers and the British agreed not to involve local Black people in the war.³¹ Despite this, Steinaecker's Horse armed these people which sometimes had tragic outcomes.³² This was indeed the case at the Battle of Fort Mpisane, perhaps the most important of Steinaecker's Horse's military encounters with the enemy. Fort Mpisane was one of the various forts that Von Steinaecker had erected in the Lowveld,³³ and together with Steinaecker's Horse some pro-British local people manned the fort. The battle occurred on 7 August 1901 when Boer forces from the Lydenburg Commando under Commandant Piet Moll attacked the fort.³⁴

The British eventually surrendered to the Boers, and although the battle had little effect on the outcome of the war, it did seriously damage the operations of Steinaecker's Horse in the region.³⁵ During this confrontation the officer in charge of the fort, Captain HF Francis, and many of the Shangané³⁶ troops, were killed.³⁷ In fact, many of these Shangané troops captured were executed by the Boers, as their participation in the war was in contravention of the agreement between the Boers and the British that no Black people would be allowed to partake in the War.³⁸

Apart from making use of local people as troops, in general the unit did not have good relationships with the local non-fighting people. Although they were sometimes assisted by the Swazi, some Swazi people were opposed to Steinaecker's Horse because they captured Prince Mancibane, as they suspected him of pro-Boer sympathies.³⁹ In another incident Lieutenant E Holgate had a Swazi executed for allegedly spying.⁴⁰

At least once members of Steinaecker's Horse captured foreigners under suspicious circumstances which led to an investigation by the British military. From archival documents it is clear that the foreigners were not armed, but that they did not stop when

asked to do so. After their capture letters were also written by their consuls to the British, as they had apparently received their clearance from the Boers and were all on their way home to their respective countries of origin.⁴¹ In another incident, a British subject, Bill Sanderson, was captured by members of Steinaecker's Horse and accused of working with the Boers. His livestock were seized, and although he proved to be innocent, he was never compensated.⁴²

There are however also positive accounts of the operations of Steinaecker's Horse. Lord Roberts even made mention of one of the successes of the unit after they captured 16 Boers trying to smuggle ammunition into Swaziland from the Portuguese territory on 8 November 1900. This was the day after the unit was officially established and presumably refers to a success by Von Steinaecker and the few men that he had under his command at the time. In addition, at the end of August 1901, a small party of Steinaecker's Horse, under the command of Captain Greenhill-Gardyne, captured 11 Boers with wagons loaded with equipment and in February 1902, Captain JB Holgate and 16 men captured 18 Boers on the Swaziland border.⁴³ Towards the end of the war, members of Steinaecker's Horse under the command of Captain D Forbes of the Lebombo Intelligence Scouts, also attacked a commando of Boers in Swaziland. The Boer commander, Commandant NJM Vermaak, was killed and the women and children that had accompanied him were captured.⁴⁴

Such incidents led to Steinaecker's Horse having a reputable standing with the British military authority. In fact, when another unit was raised for service in the Pietersburg Lowveld, they were named the Steinaecker's Horse Special Squadron. However, apart from the name, this unit, under the command of Colonel JW Colenbrander,⁴⁵ had no connection to Steinaecker's Horse.

During the war 39 members of Steinaecker's Horse died, of which only 11 died during skirmishes with the enemy. Other causes of death included malaria, being caught by lions and crocodiles, suicide and falling off a horse.⁴⁶ A number of the 337 members of the unit received special mention after the war, and 327 of them qualified for the King's South African medal.⁴⁷ Since this medal was never issued without the Queen's South African medal,⁴⁸ one can assume that these members had also received the latter. Eight members of the unit were mentioned in the despatches of Lord H Kitchener.⁴⁹ Von Steinaecker himself received mention in the London Gazette of 17 June 1902.⁵⁰ Apart from Von Steinaecker, Lieutenant JA Bailie was the only other member of Steinaecker's Horse who received the Distinguished Service Order, on 8 August 1901. On the same date, Sergeant WS Haines received the Distinguished Conduct Medal.⁵¹

The Archaeological Research

During the research on Steinaecker's Horse, a number of outposts were identified. These are mostly located in the Kruger National Park and include Bremersdorp, Nomahasha, Signal Hill on the Kalishan Mountain, Komatipoort headquarters, Fort Mpisane, Kilo 104, Muntshe, Crocodile Bridge, Outspan, Nwanedzi, Mbiyamithi Spruit, Salitje, Bottelkop, Northernmost Outpost, Sabi Bridge (Skukuza), Ngotso Mouth, Gaza Gray Outpost, Sabi Poort, Gomondwane and N'wamuriwa. Seven of these were excavated and three more documented between 1998 and 2020.

The excavation of the sites and the documentation of features, structures and artefacts thereon gives an insight into aspects such as the people present at these outposts, contact with local communities, and social differentiation. Furthermore, it assists in obtaining an idea of the lifestyle, daily activities, and everyday circumstances at the Steinaecker's Horse outposts. This relates to both intangible as well as material culture.⁵²

Intangible culture

Intangible culture includes aspects such as faith, communication, the arts, recreation, and inter-cultural influence. These issues can only be indirectly deduced from certain artefacts. Thus, the intangible is to be deduced from the tangible objects. One aspect relates to finding cultural objects associated with the White soldiers of Steinaecker's Horse and the Black soldiers and local inhabitants present on the sites respectively. Historical sources also corroborate the presence of different groups on the sites.⁵³ Artefacts normally associated with one group (e.g., indigenous pottery) at an area associated with another group, indicate mutual influence.

Glass beads (Figure 2) and pendants show another intangible dimension. Apart from being used for personal adornment, they may have also served the purpose of being a lucky charm. A good example here is the fake lion dew claws found at the Makhadzi site (Figure 3) with holes indicating their being worn as pendants.



Figure 2: Glass beads from the Gaza Gray Outpost.⁵⁴



Figure 3: Three fake lion dew claws together with eggshell and faunal material from the Northernmost Outpost of Steinaecker's Horse.⁵⁵

Remains of musical instruments is another example (Figure 4). Music is frequently used in social activities, or by an individual, sitting around a campfire and playing an instrument,⁵⁶ likely while longing for something else. Remains of Jew's harps and mouth organs were for instance identified.⁵⁷ One of the members of the unit, Trooper BT Train, indicated his occupation as musician.⁵⁸



Figure 4: Remains from food tins, an oil lamp, musical instruments, and a buckle excavated at the Ngotso Mouth site.⁵⁹

Social and everyday activities are also examples of the intangible. A number of champagne bottles with heads clearly cut off were found at Sabi Bridge. The ritual of cutting the head off a champagne bottle with a sword is unique to the cavalry, and since Steinaecker's Horse was a mounted infantry unit, this makes sense. It can also be linked to camaraderie which runs much further than a single military unit, since cavalry units from different armies also practised this ritual.

Material culture

Of course, the tangible is much more obvious from archaeological artefacts, as will be indicated below.

Food and drink

On most of the sites a large number of the remains of food tins (bully beef, fish, and ham) were identified (Figure 4). This indicates that that Steinaecker's Horse was well provisioned with military rations. Other artefacts found show that food distributed to them included Bovril, sweet oil, baking powder and a variety of sauces, e.g., Worcestershire sauce. Rations were provided frequently from military stores and included pickles, whisky and other groceries.⁶⁰ For instance, this included various tinned meat, biscuits, jam and fishpaste.⁶¹ Wolhuter indicates that Steinaecker's Horse was also provided with tinned vegetables and fruit.⁶² Baking powder tins suggest that they baked on site, and since a number of members of the unit indicated their trade as being bakers, this is no surprise. This includes Troupers CM Hay, E Morgan, and WH Williams.⁶³

The soldiers of Steinaecker's Horse did supplement their diet with fresh meat and eggs (Figure 3). Faunal remains from steenbok, zebra, blue wildebeest, and impala were excavated. It is known that members of the unit hunted and that this was the only source of meat at certain outposts.⁶⁴ A few members of the unit indicated their trade as being butchers, for instance Troopers FA Carrington and A Tempest.⁶⁵ Ammunition excavated that was not of military origin includes cartridges from shot guns, but military weapons may also have been used for hunting.

Faunal material from domesticated species were also excavated and include sheep, cattle, and goat. These animals were obtained from the local people, but were also confiscated from farmers.⁶⁶ Fish bones were identified, as well as those from birds like guineafowl and pheasant. Shells from tortoises, land snails and eggs indicate that these were also consumed.

Some of the ceramic and glass objects found had a household function. They include dinner plates, cups, saucers, cooking pots, egg cups and wine glasses. Metal objects associated with food include parts of pots, knives, forks, spoons (Figure 5), coffee pots, a grid and enamel plates. Food was likely prepared on open fires. At the Northern Outpost, a cooking shelter was excavated, and at Komatipoort remains of a primus stove was found. Water provision was very important, both for cooking and hygienic purposes. At Komatipoort two large water tanks were identified. Handles of buckets were also unearthed at some of the other sites.



Figure 5: Remains of spoons excavated at Ngotso Mouth.⁶⁷

Ceramic and glass shards excavated give information on the liquid refreshments available to the soldiers. Alcoholic beverages (Figure 6) include gin, rum, whisky, brandy, schnapps, wine, champagne, and beer, while non-alcoholic drinks are represented by soda and mineral water, ginger beer and Rose's lime cordial. The large number of objects in this category is an indication that drinking was a popular activity on site. Rum was in fact part of the daily rations given to the British troops.⁶⁸ Gin was also believed to be a counter to malaria. A section of a cork, the lead seals of liquor bottles (Figure 7) and wire from champagne bottles were also found. Soda water was produced on site. At the Northern Outpost small CO² cylinders were excavated (Figure 7). One of the members of the unit, Trooper HW Warcup, indicated his trade as being a producer of mineral water.⁶⁹



Figure 6: Bottles from alcoholic beverages found at the Sabi Bridge Outpost. Note the wire around the head of the champagne bottle fragment.⁷⁰



Figure 7: CO2 cannisters, a toothpaste tube, a section of a syringe and lead seals excavated at the Northernmost Outpost.⁷¹

Transport

At the Northern Outpost and at Sabi Bridge, parts of the undercarriage of small carts were found. This was probably used to transport ammunition or other supplies. Faunal material from donkeys indicate that these animals were present on site and that they were probably used as draught animals. It is known that ox wagons were used to carry supplies between the different outposts.⁷²

Since Steinaecker's Horse was a cavalry unit, they would have used horses. A historical photograph shows some of the officers of Steinaecker's Horse on horseback, while artefacts associated with horses were identified at Sabi Bridge. These include horseshoe nails, metal rings, buckles from bridles and pliers used for removing nails from horseshoes. The unit did have veterinarians, for instance Lieutenants JW Edward and EC McCrystal.⁷³

Many objects associated with the railway were found at Sabi Bridge. It is known that the members of the unit used the railway to transport provisions between this site and Komatipoort.⁷⁴ A coco pan which may also have been used to transport provisions, was found at Komatipoort.

Technology

Most of the artefacts excavated can be linked to technology and are discussed under other sections. Remaining aspects include the provision of light. The handle and cover of a paraffin can and lamp were found at the Northern Outpost, and the remains of an oil lamp at Sabi Bridge (Figure 4). Many pieces of wire which could have had a variety of functions, were excavated. A section of copper wire found at Sabi Bridge may have been used in a mechanism to blow up the blacksmith workshop, as it is similar to explosive devices of the time (apparently the workshop was blown up after the war).⁷⁵

Axe heads (Figure 8) excavated at the Northern Outpost, were used to chop wood for the purpose of obtaining firewood, building material or repairing equipment, and to build a branch-fence around camp. A number of hoe blades were found, and were probably linked to agricultural activities, but it is unlikely that the soldiers would have planted crops. It was thus probably used by local people who were employed as servants at the outposts.



Figure 8: Axe heads, files and tailor's scissors found at the Northernmost Outpost.⁷⁶

Personal care

Some of the excavated artefacts can be linked to the personal hygiene of soldiers. Two examples are fragments of Odol mouth wash containers and toothpaste tubes (Figure 7). The cover of a shoe polish tin was found, something that definitely can be expected in a military context.

Remains of medicine bottles and ointment containers were identified. Some of the illnesses that the soldiers had to cope with were malaria and black water fever,⁷⁷ but based on the large quantities of liquor bottles on the sites, it seems that they rather believed in the medicinal power of gin to ward off fever. Remains of syringes (Figure 7) were also found, and it is known that the unit had a number of surgeons, including Captain AJ Campbell and Lieutenant AN Grieve.⁷⁸ They also had pharmacists, namely Corporals W Jasper and WJ Wright,⁷⁹ as well as a dentist, Corporal A Baagoe.⁸⁰ The only kind of medicine that could specifically be identified from bottle fragments is Eno's fruit salt, indicating that stomach problems were one of the ailments with which the soldiers had to cope. Refuse middens at the outposts, as well as a specific storage area for empty bottles at Sabi Bridge, are an indication of containing refuse, which may have assisted in controlling illness. However, at Steinaecker's Horse, this was not the case, and hygiene may have been a problem. In fact, it is known that sanitary conditions were not always maintained at British camps.⁸¹

Clothing and paraphernalia

A large variety of objects related to clothing were found. These include cufflinks, as well as many different buttons, some with a definite military origin. Buttons made from wood or bone were probably manufactured on site. Beads, bangles, earrings, parts of pocket watches and finger rings are examples of paraphernalia. Remains of shoes were also

identified, including the heel irons from military boots. Buckles (Figure 4) from belts and braces, made from copper, bronze and iron, were also excavated.

Two tailors' scissors (Figure 8) found at the Northern Outpost suggest that clothes were mended. Other objects in this regard included pins, needles made from bone, and an awl. The unit had tailors as members, for instance Troopers CJ Gooden and AW Sinclair.⁸²

Handwork

Mending clothes is of course a form of handwork. Making buttons and needles etc. are also handwork activities in which the members of Steinaecker's Horse were engaged. Three fake lion dew claws made from bone, and a coin with holes to carry it around the neck are also examples. Rings and bangles also may have been produced on site.

Ceramic pottery found may have been manufactured on site, but again would likely have been associated with local inhabitants. A hand-made arrowhead which was identified at the Northern Outpost is also probably a locally produced artefact.

Some of the nails excavated were hand-made, whilst others were bent to serve as hooks (e.g. for hanging clothing). Others were bent to form fishhooks, as fishhooks bent from wire were also found (Figure 9). These were likely done by the soldiers in order to fish. Two files (Figure 8) excavated at the Northern Outpost, were probably used to make other objects, while pocketknives could also have been used for this purpose (Figure 10). Wire with sharpened points is not only a product of handwork, but may also have been used as a tool in making other objects.



Figure 9: Fishhooks and nails from the Northernmost Outpost⁸³



Figure 10: A pocketknife excavated at Sabi Bridge⁸⁴

Architecture

The architecture of Steinaecker's Horse is probably not unique, as it would be similar to typical military buildings of the time. These were mainly prefabricated buildings made from corrugated iron.⁸⁵ Examples are the blockhouse at Sabi Bridge and buildings at Komatipoort.⁸⁶ These buildings nevertheless had stone, brick, and concrete foundations which the soldiers had to build themselves. A number of builders were members of the unit, including Troopers W Cartwright, TH Moore, and G Povall.⁸⁷ Since most of the buildings identified were at least partially formally built, it can be assumed that these soldiers were responsible for the erection thereof.

The blacksmith workshop at Sabi Bridge was partially made from bricks and also had wooden beams. It likely also had a corrugated iron roof. Another building at this site had walls made from corrugated iron, wooden posts, and clay. Metal sleepers from the railway were also utilised. These are unique features as an adaptation to their circumstances. The building may have been used as offices, garrison's quarters, or a mess hall. Structures without formal floors were also excavated here. They include three storage areas with walls made from wooden poles and clay.

A hut and cooking shelters at the Northern Outpost were also made from clay and wooden posts. This hut and a large building excavated at Sabi Bridge had earth floors, an indication of adaption to local building styles. Further indications of architecture include window glass, a window latch and the remains of a wooden door, sections of locks, hut clay, nails, screws, and washers.

At Komatipoort various examples of architecture were identified. These include blockhouses, a fort, steps, footpaths, water furrows, storage rooms, and a stable etc. Stone was mainly used in construction. Artefacts indicating the use of tents consist of the eyes from sails and tent pegs. It is known that tents were issued to British soldiers.⁸⁸

Trades and occupations

Different trades and occupations have been mentioned above. The most important tasks of the members of Steinaecker's Horse were of course to be soldiers. Military activities would have included doing patrols, target practice, standing guard and being involved in skirmishes. Most of the ammunition excavated are from military rifles (Lee Metford, Lee Enfield, Maxim, and Martini Henry) and confirm these activities. Having firearms probably meant that a gunsmith was needed. Trooper JM Mills was indeed one.⁸⁹

There are many associated activities needed to keep a military unit going. One of the excavations at Sabi Bridge seems to have unearthed a quarter-master's store, suggesting that such a person with personnel must have been present. Woolmore indicates that Lieutenant JW Dallamore was the quartermaster of Steinaecker's Horse.⁹⁰ Control over equipment and the handling thereof, as well as dispatching provisions to the different outposts would have been part of their duties. A small weight excavated may be linked to these activities. One of the duties of Sergeant Harry Wolhuter was to transport provisions and equipment between the different outposts.⁹¹

Although Woolmore lists the trades of each member of the unit, it does not mean that they were necessarily utilised in the same capacity. He mentions for instance the following occupations: builders, blacksmiths, barmen, auditors, fire-fighters, engineers, policemen, wagonmakers, electricians, glass cutters, miners, cooks, musicians, and barbers.⁹² Since Steinaecker's Horse was a mounted infantry unit one can expect trades linked to horses. Trooper JA Barnes was a blacksmith, Troopers S Cooper and RC Edlin horse breakers, Trooper J Cox a horse trainer, Troopers G Dillman and JH Healy saddle makers and Trooper FJ Lambe a saddle and bridle maker.⁹³

A large number of soldiers had construction trades, and one can assume that they assisted in building activities. Wolhuter, who was a farmer and hunter before the war, nevertheless indicated that he assisted in the building of the blockhouse at Sabi Bridge.⁹⁴ Tom Boyd and Clinkers Willis were the train drivers between Sabi Bridge and Komatipoort.⁹⁵ Blacksmith activities were also practised here and can be seen in hammer and anvil stones on site.

There must have been cooks to prepare food for the unit. One of these was Trooper CO White.⁹⁶ An associated activity to food preparation is the sourcing of food, and fishing and hunting served this purpose. These food sources had to be slaughtered, and it is known that there were a number of butchers in the unit, for instance Trooper A Tempest.⁹⁷ Pocketknives may have been used for this purpose. Fauna material from small animals such as frogs indicate that these had to be captured. They were probably used as bait when fishing.

Another task was carrying water to site, seen from handles from buckets that were excavated. Tailors' scissors indicate the mending of clothes, which was likely done by

members of the unit who served as tailors. Artefacts associated with writing were also found. These include fragments from ink containers, a paper clip and the point of a flood pen. These could have been personal items, but may also have been used for official correspondence of the unit.

Other objects found indicating trades were shovels, picks, chisels, and a crowbar. The remains of purses found at Sabi Bridge were likely used to pay wages. There would, therefore, have been a paymaster and Woolmore indeed indicates that the unit had several paymasters like Lieutenant A Gray.⁹⁸

Protection and defence

Since Steinaecker's Horse was a military unit, activities of a military nature would have been the order of the day. Target practice, patrols, sentry duty and skirmishes were already mentioned. The ammunition found, many which were of military calibre, is an indication of these activities (Figure 11). Standing guard of course had more than a military function, as they had to guard against wild animals as well. On a number of occasions lions attacked both men and horses.



Figure 11: Ammunition excavated at Sabi Bridge.⁹⁹ From left to right and top to bottom - Martini-Henry, Lee Metford/Enfield, 12 bore shotgun, Lee-Metford/Enfield, Maxim, Maxim, Lee Metford/Enfield.

Some of the buildings at Komatipoort had a distinctive offensive or defensive function. These include blockhouses, canon positions, a fort and trenches. A few military structures were however identified at the other outposts. A photograph of Sabi Bridge indicates that there was a blockhouse.¹⁰⁰ The main function of the blockhouse would have been to

protect the bridge over the river. Together with a camp on both sides of the river it would have been difficult to attack. At N'wamuriwa military trenches were discovered. Other artefacts of military origin include uniform buttons, heel irons from boots and hinges from ammunition cases.

Other

Metal hoops from wooden barrels and crates were found at various sites. Barrels had many functions, but were nothing more than storage containers, as were wooden crates. At Sabi Bridge a hoop was found at the blacksmith workshop, indicating that a barrel filled with water was located here to cool warm iron.

Small bronze crosses found here were probably decorative elements on purses used for payment of wages. Two coins (Figure 12) excavated also indicate the presence of money on site, which may have been used to purchase personal items.



Figure 12: Two sixpence coins from the Sabi Bridge site. Note the holes in the first one, likely made to be able to wear it as a pendant.¹⁰¹

Some of the soldiers smoked. The remains of kaolin pipes and the brass lids of such pipes were identified. The tail of an ornamental animal, made from bronze, was also found. It was probably used by someone who wanted to decorate his living quarters.

Conclusion

Steinaecker's Horse played an important role in the Lowveld during the Anglo-Boer War. It is interesting to note that their outposts were mostly located close to existing communities, and that the placement thereof was perhaps to a lesser extent influenced by military-tactical reasons. On the other hand, the communities lived close to known routes and thus the camps were strategically placed on possible routes that the Boers could have utilised.

By analysing and interpreting the different cultural objects excavated on the sites, an explanation of life at such a military outpost can be given. At many of the sites, the artefacts reflect social and racial differentiation. This refers to the types of artefacts identified, as well as to different locations within one site. Thus, it seems that the officers were separated from the men. Also, the White soldiers of Steinaecker's Horse stayed separate from the local inhabitants and Black soldiers at these sites. This can be seen from artefacts such as indigenous pottery, glass beads and even traditional weapons at certain sections of the sites, as opposed to other sections where European type ceramics (porcelain and stone ware) were found, together with the remains of glass bottles, military buttons, and ammunition from the time.

Military artefacts excavated are proof of these sites being linked to the Anglo-Boer War. Apart from these military artefacts, the archaeological material assists in forming an idea of the daily life at these sites. It can be used to make assumptions about the activities which the soldiers and other people on site were engaged in, and provides insight into the daily activities at such an outpost. Archaeological research thus brings insights and new perspectives into Steinaecker's Horse. As such it is an example which can be utilised in other research projects and sites associated with the Anglo-Boer War.

Endnotes

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Submarine Psychology: A South African Perspective on Assessing Readiness after Adversity

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Abstract

Psychological readiness is a critical component for the success of the mission of the South African Navy, as well as the wellbeing of their personnel. The study on which this article reports, explored psychological readiness within the unique and demanding context of submarine duty. Key psychological factors for readiness include good clinical mental health, adaptability, and effective interfacing with support systems. From the 1970s, SA military psychologists have been involved in the selection of submariners, focusing on traits, such as motivation, intelligence, interpersonal skills, and personality. More recently, positive psychological constructs, such as sense of coherence, psychological hardiness, and mental toughness, were also identified as important for coping with the isolation and stress inherent in submarine operations. The current research specifically examined the aftermath of the SAS *Manthatisi* accident of September 2023, highlighting the psychological resilience of submariners and risk and protective factors associated with their post-accident adaptation. Initial screenings showed the presence of adjustment difficulties and other mental health challenges, but by seven months, most submariners had returned to their baseline mental health, demonstrating resilience and effective coping strategies. The importance of thorough pre-service selection, regular psychological screening, and timely interventions were emphasised as key to maintaining operational readiness. Insights from the accident furthermore underlined the need for resilient personnel who can withstand adverse events and speedily return to duty. The study concluded that ongoing availability of psychological support and the cultivation of resilience and adaptability are essential for maintaining the readiness and effectiveness of submariners.

Keywords: Adaptability, Coping, Mental Health, Psychological Readiness, Resilience, Submarine Operations.

Introduction

In September 2023, the South African Navy (SAN) submarine SAS *Manthatisi* tragically lost three sailors during a training exercise. In light of the emotional impact on the submarine squadron, the incident led to a reconsideration of the local understanding of readiness of sailors in general to continue with operations after adverse events. The aim of this article is to offer a South African (SA) perspective on the psychological readiness for submarine operations, set against the backdrop of the tragic events of September 2023.

The above aim will be pursued as follows: the article starts with a brief discussion of the concept “psychological readiness”, and then provides a brief overview of the involvement of psychologists with the SAN submarine service in order to discuss evolving

understandings of readiness in this context. This overview will be twofold. Firstly, it will touch on historical selection and psychological characterisation of submariners as pertaining to personal readiness; and secondly, it will describe the current involvement of the Institute for Maritime Medicine (IMM) with regard to the psychological wellbeing (and thus readiness) of SAN submariners.

The events of September 2023 and the post-accident psychological adaptation of the submarine squadron are reported as a case study, and discussed within the framework of psychological readiness for submarine operations after adverse incidents. Risk and protective factors – both short-term (seven weeks) and medium-term (seven months) – are presented in the context of adaptation and return to readiness after adverse occupation-specific events. The article concludes with insights gained and lessons for practical implementation.

Psychological Readiness for Duty

“Fitness for duty” – medically speaking – refers to a state of health relative to employment demands.¹ More formally, being (medically) fit for duty means that an employee’s physical, emotional, and mental condition would allow them to perform essential job duties in a proper, safe, and competent manner.² This locates “fitness for duty” within the context of workplace health and safety. In the common use of language in armed forces, the term “fitness” is however more often associated with physical conditioning (e.g. how many push-ups someone can do or how far they can run), and thus does not easily fit into psychological nomenclature.

In the context of military operations, the term “psychological readiness” is sometimes offered as an appropriate alternative. “Psychological readiness” refers to a composite set of mental attributes and capacities that enable sailors, medical personnel, aircrews and soldiers to meet the environmental, interpersonal, and operational challenges inherent to military service. In essence, it captures the mental state and preparedness of service members to function effectively under stress and uncertainty – whether during active combat, long deployments, or routine military life. Psychological readiness is multifaceted and comprises several key components:

- *Conation* – the mental energy and focus required to carry out a task to completion.³ While this may overlap with motivation, “conation” refers to the neuropsychological capacity to apply consistent and purposeful mental effort over time.⁴ It reflects the drive and determination to stay engaged, particularly in monotonous or taxing circumstances – a critical trait in the highly structured and high-pressure environment of submarine duty.
- *Emotional stability* – the ability to maintain predictable and balanced emotional responses, even when confronted with trauma, stress, or a crisis.⁵ Emotional stability is marked by the absence of mood volatility and extreme emotional reactions. In practice, this often correlates with the absence of diagnosable psychiatric conditions, and indicates a high degree of psychological self-regulation.

- *Adaptability* – the ability to adjust quickly and effectively to changing circumstances, environments or roles.⁶ Adaptability is supported by several resilience-related attributes, such as:
 - *Psychological resilience* – the ability to bounce back from adversity, trauma, or stress, and to maintain psychological wellbeing. This involves flexible thinking, emotional regulation, and the capacity to respond positively to internal and external stressors.⁷ A number of factors contribute to how well people adapt to adversities, predominant among them:
 - the ways in which individuals view and engage with the world (also called “life orientation”);
 - the availability of specific coping strategies; and
 - the availability and quality of social resources.
 - *Mental toughness* – the capacity to persevere in the face of adversity, hardship, and uncertainty. Sometimes also called “grit”, mental toughness entails working strenuously to overcome challenges and maintaining effort and interest over time¹ despite failures, adversities, and plateaus in progress.⁸ Mental toughness has been associated with performance success in military settings,⁹ including SAN surface ships and submarines.¹⁰
- *Coping skills* – the availability of and confidence in techniques and strategies to manage stress, anxiety, and other emotional challenges. This is often associated with psychological self-regulation.
- *Support systems* – access to resources, such as family and/or peer support, mental health services, and leadership support, to help service members cope with psychological stressors. Reference to support systems also refers to the quality of such resources.

Other organisational and operational factors may also contribute to readiness, although they typically fall outside the scope of the individual or personal psychological dimensions of this article.

“Mission readiness”, for instance, refers to a person’s confidence in their training, experience, and equipment. Related concepts, such as “unit cohesion”, or the “collective will to fight”, also play a role. These elements belong to the domain of industrial and organisational psychology, but remain deeply intertwined with individual mental readiness.

In the context of the SAN submarine service, psychological readiness takes on a heightened significance due to the unique stressors of the undersea environment – including extreme confinement, isolation, sensory monotony, and reliance on a small crew for extended periods. The IMM in Simon’s Town, South Africa, is contracted to provide medical and associated health services to the SAN submarine service. At the IMM, readiness for submarine duty is framed through the following psychological considerations:

¹ “Grit” refers to a personality construct, and is different from “conation”, which refers to a neuropsychological or biological construct.

- *Clinical mental health* – individuals need to be free from any psychopathology that could impair functioning in a confined, high-stakes environment. This incorporates measures of cognition and emotional stability, ensuring that individuals can maintain focus and regulate their emotions under pressure.
- *General adaptability*, which includes:
 - A resilient life orientation, indicating a generally optimistic and adaptable worldview;
 - An adaptive personality, that can facilitate the mobilisation of coping strategies; and
 - The capacity to activate appropriate coping skills and resources.
- *Interfacing with support systems*, which in turn need to be responsive, meaningful, and enduring.

These indicators are evaluated routinely by means of the IMM biennial Maritime Specialist Psychological Screening (MSPS), which is described later in this article. Broad organisational factors, for example perceived organisational support, belief in leadership, and confidence in equipment; or aspects, such as group cohesion and the collective will to fight, fall under the scope of industrial and organisational psychology, and are not assessed at the IMM, whose mandate is to operate from a health promotion position.

South African Submarine Service and the Discipline of Psychology

The understanding of psychological readiness for submarine duty has evolved over time alongside the historical involvement of the discipline of psychology within the submarine service. Initially, psychological readiness was understood through the lens of selection, and terms, such as “suitability” of candidates, were used to reflect this. The more recent understanding is described within the current involvement of the IMM Mental Health Clinic. This will be described later in the article.

Selection during the Daphne Period (1966–2000)

During the early second half of the twentieth century, in line with international experience, psychological readiness was closely associated with the selection of suitable submariners. In 1966, the SAN therefore commenced with the selection of naval officers and ratings for the then newly created submarine service. Earlier studies were done by psychologists from the National Institute for Personnel Research and South African Defence Force,¹¹ and have been summarised in an earlier article.¹² During the period 1970 to 1990, psychological selection mainly focused on five aspects, namely motivation, intelligence or academic ability, interpersonal relations, personality, and technical aptitude, which – in combination – were understood to reflect psychological readiness. Reports from that time noted that *realistic expectations* strongly predicted good adaptation to submarine service¹³ – an issue that remains a challenge in modern-day selection.

While the above psychological assessments used standard protocols, one unusual test was developed specifically to simulate the operational demands of a submarine environment. The Climate Room Tension Test was intended to assess performance under conditions of

continuous physical discomfort and tension.¹⁴ This test worked as follows: a small group of candidates were placed in a room where environmental conditions were controlled from the outside. Temperature was maintained at 30 °C, humidity at between 88 per cent and 90 per cent, and speakers fed a recording of compression hammers at 88 decibels into the room. Candidates had to complete tasks that were dependent on group cooperation and interaction, while a panel of observers rated their cooperation, response to tension and frustration, leadership, and acceptance by the group through a one-way mirror. While a novel approach to assess readiness, the test was time-consuming and labour-intensive, and there is no record that it was used after 1970.

Psychological selection for submarine duty was suspended in the 1990s, with mental health assessment continuing as part of the Comprehensive Submarine Medical Assessment at IMM.

Overview of Earlier Descriptions of Psychological Characteristics of SAN Submariners

Over time, several psychometric analyses that explored the characteristics of active-duty submariners advanced the evolution of understanding of psychological readiness by the IMM. Reports describing the adaptive characteristics of submariners considered constructs, such as personality, mental health and psychological functioning, as well as constructs from positive psychology, such as resilience, sense of coherence, and mental toughness. These reports on SAN submariners are in the public domain, and are summarised here to demonstrate how they informed current perspectives on psychological readiness.

Personality

There is some debate on the usefulness of including personality as part of psychological readiness deliberations.¹⁵ Environmental demand theories however describe people with particular personality characteristics to gravitate towards particular occupational environments.¹⁶ Personality thus indirectly shapes psychological readiness, as specific configurations of personality traits may underpin adaptability-in-context. The presence of four personally traits have been demonstrated to support individual readiness for submarine duty,¹⁷ namely:

- *Adventurousness.* Often perceived as a blend of emotional toughness and readiness to roll up one's sleeves and get to work, adventurousness is particularly appropriate for submariners in two ways. Firstly, it presents a largely constitutional predisposition to low physiological reactivity to threat,¹⁸ which would enable good performance and wellbeing, despite submarine sailors' understanding of the inherent dangers of submarine duties. Secondly, adventurousness fosters resilience in interpersonal contexts, enabling submariners to cope with the emotional strain of long-term, close-quarters living under stressful conditions.¹⁹
- *Dispositional confidence.* This trait reflects a stable sense of self-assurance, calmness, and importantly, a strong sense of self-agency – that inner belief that people can influence outcomes in their environment through personal effort.

- *Group orientation.* This trait is associated with good cooperation within groups, and with sufficient sensitivity in social interaction – a critical requirement for adjusting to the close-knit social structure of life on board submarines and the constant exposure to the social interaction that is prevalent.²⁰
- *Precision and exactitude.* This trait involves self-discipline, meticulous attention to detail, and even a degree of compulsiveness.²¹ The demands of submarine duty may require an exceptionally high degree of precision, and training and sea duty further ingrain the meticulous checking of equipment and adherence to operating procedures – all vital requirements for situations where small errors could have catastrophic consequences.

Further, a seminal analysis, using data of submariners according to the Minnesota Multiphasic Personality Inventory-2, confirmed that effective submariners score within adaptive ranges for both mental health and personality functioning.²²

Constructs from Positive Psychology

The Institute for Maritime Medicine (IMM) has a long history of using constructs from positive psychology in their work with submariners.²³ Constructs, such as sense of coherence, psychological hardiness, and mental toughness, offer complementary insights into the readiness of submariners for sea duty.

- *Sense of coherence* (SoC) refers to an enduring dispositional orientation that views life as understandable, manageable, and meaningful, which in turn enables individuals to mobilise effective coping resources in the face of tension.²⁴ Enhanced SoC has been associated with high adaptive coping in military contexts,²⁵ and with certain adaptive personality traits common to SAN submariners.²⁶ A high SoC appears to enable submariners to mobilise those resources in their environment that would support adaptive personal coping and, by extension, psychological readiness.
- *Psychological hardiness* comprises three interrelated components, namely commitment, control, and challenge. Hardy individuals view difficult situations as opportunities for growth rather than threats, and are especially resistant to the adverse effects of personal and environmental stress.²⁷ Well-adapted submariners scored high on measures of hardiness, and tended to display an associated personality profile characterised by high agreeableness, high conscientiousness, and low neuroticism, which have been associated with enhanced readiness for submarine duty.²⁸
- *Mental toughness* is related to hardiness, and comprises four components, namely commitment, control, challenge, and confidence, and is strongly associated with perseverance,²⁹ known colloquially as *vasbyt* (to hang on). Again, individuals who score high on measures of mental toughness share the same personality traits as those high in hardiness,³⁰ reinforcing the consistency of the personality profile supporting psychological readiness for submarine operations.

Emotional disposition

Emotional disposition refers essentially to one's typical emotional state or "trait emotions", and has proved to be predictive of psychological adaptation in submariners. Originally derived from the Trait-State Personality Inventory, emotional disposition allows for a forward-looking assessment of psychological readiness, especially when predicting how individuals may fare during future deployments or stressful assignments. Submariners who display positive emotional dispositions also report positive mental toughness,³¹ which illustrates the interplay between affective traits and overall resilience in determining psychological readiness.

Coping strategies

Globally, both problem-focused coping strategies and interpersonal sensitivity have been associated with superior coping during submarine missions.³² Submariners from the SAN reflect this trend, reporting problem-solving approaches (e.g. planning, taking action) as their preferred styles. They also use cognitive coping approaches (e.g. positive reframing, religion) effectively as additional coping styles. This is particularly useful in situations where they might not be able to change their external environment. Equally interesting are the coping styles they do not endorse, namely behavioural disengagement (e.g. giving up, not persevering), as well as denial of their situation.³³

While these tendencies represent dispositional coping styles – in other words, the way in which they would typically cope – across different situations, real-time adaptations to the submarine environment suggest dynamic flexibility. Over long deployments, SAN submariners increasingly rely on cognitive coping tools, such as humour, acceptance, and positive reframing. As the duration of deployment stretches, self-distraction also becomes a prominent coping strategy, allowing individuals to shift focus away from internal stressors, and find temporary mental relief.³⁴ This shift in coping strategies reflects an essential element of psychological readiness: adaptability across time and circumstance.

Two specific coping styles stand out as especially relevant within SAN submarine culture, and are reflected in other submarine services as well:³⁵

- *Dispositional confidence* was discussed earlier in this article, and refers to a person's sense of agency, a belief that their own actions might influence outcomes in their environment.³⁶ Such a disposition acts as critical coping resource to sustain constructive psychological performance and wellbeing during submarine operations.
- *Rational denial* refers to the unspoken consensus among submariners that openly discussing the risks of disaster is unhelpful.³⁷ This is not a denial of danger but rather a selective suppression of such awareness in day-to-day consciousness. Submariners appear to acknowledge the hazards of their profession, but consciously choose not to dwell on them, adopting a mind-set of "light fatalism" – acceptance of risk without fixation. While this mechanism supports functional coping during routine operations, it can be disrupted in the wake of real-world incidents – such as the SAS *Manthatisi* accident – when threats may become too immediate or tangible to ignore. Both these coping

characteristics are strongly associated with enhanced psychological readiness for submarine operations.

Recurrent social stressors

Social stressors may occur irrespective of individual coping styles or self-efficacy, and are generally not directly germane to psychological readiness. When individuals have difficulty resolving such stressors appropriately, its reoccurrence may however compromise long-term adjustment. Such stressors are referred to as “recurrent social stressors” (RSS), and their presence suggests difficulty in mobilising appropriate coping resources, leading to failure to manage or resolve concerns adequately. Unlike acute or isolated stressors, RSS reflect persistent interpersonal issues that fail to resolve over time, and which may resurface under strain.

An analysis of SAN submariner data from 2015–2017 showed that 60 per cent of sailors removed from active duty due to poor adjustment had unresolved RSS.³⁸ Moreover, all additionally flagged cases during that period also involved RSS as a contributing factor. This finding suggests that repeated failures to navigate social stressors may be indicative of broader limitations in abilities to activate and mobilise coping strategies and resources, which should be considered when determining psychological readiness for submarine operations.

Overview of Current Involvement of the IMM Mental Health Clinic

The IMM in Simon’s Town provides medical and related health support for submariners.³⁹ The psychologists at the IMM mental health clinic have a threefold engagement with the submarine service, namely:

- Mental health screening during the initial comprehensive submarine-specific medical assessment;
- The MSPS incorporated into the routine biennial comprehensive submarine-specific medical assessments; and
- Ad hoc psychotherapeutic interventions throughout the careers of submarine personnel, when requested.

Initial Comprehensive Submarine-Specific Medical Assessment

New candidate submariners are required to undergo a comprehensive submarine-specific medical assessment to obtain an “S” medical classification² when joining the submarine branch, with a repeat “submarine medical” every two years until they reach 40, and thereafter annually for the rest of their career. The initial assessment includes a mental health screening component, which has as its main purpose the identification of major mental health challenges, prior to candidates’ deployment to the submarine squadron, and to advise the confirming medical authority accordingly. This evaluation mainly assesses for risk of psychiatric syndromes, although personality factors incompatible with submarine operations would, in theory, also raise concern. As there is currently no mechanism to exclude such candidates, this is, however, generally not considered.

² In the SAN, an “S” medical classification refers to medical fitness for submarine duty.

Biennial Maritime Specialist Psychological Screening

The biennial Maritime Specialist Psychological Screening (MSPS) is used to identify current mental health challenges in order to facilitate their resolution and promote adaptive coping in general, and to advise the confirming medical authority accordingly. Where appropriate, identified submariners are referred for a psychotherapeutic intervention, in order to maintain their active-duty status. As far as could be ascertained, the IMM is the only facility in sub-Saharan Africa where MSPS is offered. The overarching screening is prescribed in part by occupational health and safety legislation, and the MSPS is seen as part of occupational mental health monitoring and promotion. The MSPS is thus guided by occupational mental health sensibilities, and attempts to answer the question whether “this person is able to do this work at this time”, and without undue risk to the health and safety of self or others (within a military operational context).

The focus of the MSPS is twofold: to consider psychiatric symptomatology, which is generally not expected, and then to follow a salutogenic (or health-promoting) approach to facilitate continuous good adaptation. A salutogenic approach entails a focus on what keeps individuals mentally healthy. This is typically done by the individual exploring their strengths and resources, and developing their skills to mobilise those resources.⁴⁰ The exact psychometric protocol used for mental health monitoring has changed over the years, with emotional disposition featuring strongly in the period 2000 to 2020, and clinical symptomatology moving to centre stage from about 2017–2018 onwards. This happened as part of a requirement to integrate various forms of occupational mental health monitoring and military mission readiness assessments more closely.

Ad Hoc Psychotherapeutic Interventions

Throughout a submariner’s career, their psychological readiness can be supported through formal psychotherapeutic intervention. Such interventions may be in response to referral through their divisional system, from a medical officer, from a psychologist (typically after an MSPS), or – most often – self-referral. Interventions are tailored to individual needs, and form part of the regular outpatient service at IMM.⁴¹

Through all three mechanisms – entry, routine, and ad hoc interventions – psychological readiness for submarine operations is determined by a relative absence of clinically debilitating psychopathology (i.e. good emotional stability), the presence of adaptive functioning-in-context, and the ability to mobilise personal and social coping resources when required.

Submarine Accident of September 2023 and its Aftermath: A Case Study on the Assessment of Readiness after Adversity

As an extension of the routine involvement of the IMM mental health clinic, the events of September 2023 and their psychological impact are reported as a case study, to highlight risk and protective factors associated with adaptation and return to readiness after adverse occupation-specific events.

Background

On 20 September 2023, the South African Navy Type 209 diesel-electric submarine, SAS *Manthatisi* (S101), conducted a vertical replenishment (VERTREP) exercise while underway off the west coast of the Cape Peninsula, amidst strong winds and heavy seas. During the course of the afternoon, three senior sailors died of injuries sustained after being washed overboard during the exercise, while another five submariners (including a rescue swimmer deployed by helicopter) spent many hours in the water before being rescued by the National Sea Rescue Institute (NSRI). All five eventually made a good physical recovery. The deceased were the executive officer (Lt Cdr Hector), Chief of the Boat (Master Warrant Officer Mathipa), and the chief of the boat under training (Warrant Officer Mojela).⁴² The boat returned to her home port of Simon's Town the next day.

This incident bore resemblance to an event in December 2006 where four crew members of the USS *Minneapolis–Saint Paul* (SSN-708) were washed overboard by heavy seas in Plymouth Sound, England. Here, too, the Chief of the Boat was one of two fatalities. Similar anecdotal accounts of sailors being washed overboard from SAN submarines in heavy seas during operational deployments have been circulating going back to the Daphne era (although without fatalities).

In the week following their return to Simon's Town, voluntary psychological debriefings for affected submariners took place, and addressed those members who were identified, or who identified themselves, as in need of such interventions.⁴³ A mass memorial service was held a week after the incident, with various members of the submarine squadron participating. Formal funeral services were also held for the three deceased submariners, with full military honours, in their respective home communities. The submarine squadron was intimately involved in these arrangements, and participated in large numbers during each event.

Seven weeks after the incident, a psychometric screening was conducted to determine the readiness of submariners to return to active operational duty, and to, where appropriate, make recommendations to facilitate this. As a result, a number of individuals were offered further psychological counselling. A second and final psychometric screening was conducted about seven months after the accident.⁴⁴ In accordance with routine practice at IMM, the psychometric data were analysed to understand post-accident psychological stress responses and subsequent psychological readiness of the submariners better. The findings below describe short- and medium-term risk and protective factors, as well as the course of adaptation and return to readiness after this adverse occupational-specific event.

Methodology

All members of the submarine squadron who were available at the time, participated in the screening. The data for the current analysis came from three sources, and were accessed for this study with the participants' written consent. To protect the privacy of the participants, no source data are presented, only the outcomes of the analysis. Ethics permission for the analysis was provided by Stellenbosch University Health Research Ethics Committee (N20/07/078, dd 29 January 2024).

First, IMM maintains an archive of MSPS records, which were used to place the participating submariners' current experiences into their personal historical context. Data included:

- History of RSS (unrelated to submarine service) or other family–work interface concerns (i.e. previous family issues that interfered with work performance);
- History of multiple and/or recent losses (defined as the loss of a family member or close friend within the preceding three months, or the loss of multiple family members or close friends during the preceding year);
- History of previous psychological trauma (in preceding three years; although not clear what qualified as “trauma”); and
- Scores on the Connor–Davidson Resilience Scale-10 collected during their previous MSPS cycle.⁴⁵

Second, quantitative data were available from the psychometric survey during week 7.⁴⁶ The assessment included a composite clinical screener to identify maladaptive psychological stress responses (namely adjustment disorder, major depressive disorder, and post-traumatic stress disorder [PTSD]), as well as clinical interviews.

Third, quantitative data were available from the psychometric survey administered at seven months.⁴⁷ The battery included the same composite clinical screener to identify maladaptive psychological stress responses, as well as the Coping Self-efficacy Scale⁴⁸ that measures an individual's confidence in their coping strategies when it comes to handling challenges and stressors. Positive associations between coping self-efficacy and physical and mental health outcomes have previously been reported in military samples.⁴⁹

The IBM SPSS 29 was used for statistical analysis, which comprised descriptive, chi-square, and regression analyses to determine associations with risk and protective factors, and likelihood ratios.

Psychological Responses to Collective Traumatic Events

Before describing the psychological stress responses after the submarine accident, a brief consideration of psychological responses to collective traumatic events (e.g. mass tragedies, disasters) in general, may be helpful.

Individuals may present with widely different responses to collective traumatic experiences. In spite of this, for the majority of people there appears to be a typical course of psychological symptoms after disasters, namely that post-disaster symptoms of mental health problems are reported soon after such events, but are also resolved relatively soon thereafter.⁵⁰ For smaller segments of society, symptoms may persist for some time, or for others, these may be delayed and only present later. Table 1 below lists a range of different trajectories (of psychological adaptation) following exposure to severe stress.⁵¹ The SAN estimates are discussed in the section ‘Course of Post-Incident Mental Health’ later in this article.

Descriptive name	Nature of trajectory	General population estimates ⁵²	SAN submarine accident 2023 estimates (after seven months)
Resistance	No or mild stable symptoms	54%	75,0%
Resilience	Initially moderate or severe, followed by sharp decrease	10%	22,5%
Recovery	Initially moderate or severe, followed by gradual decrease	9%	0%
Chronic dysfunction	Moderate or severe and stable symptoms	13%	2,5%
Delayed dysfunction	Initially mild symptoms, becoming severe only after a period of time	14%	0%

Table 1: Different trajectories of psychological adaptation after exposure to severe stress

The prevalence of psychological symptoms after disasters depends on many factors, including the degree of exposure and availability of post-disaster social support.⁵³ Historically, low rates of PTSD and other clinical disorders have been reported from French, Norwegian, and US submariners following submarine-specific accidents.⁵⁴ Analyses showed that previous and subsequent traumatic life events tend to exacerbate the severity of post-traumatic stress responses to a single-accident submarine event.⁵⁵ The low rates of long-term adverse reactions are regularly attributed to the fact that submariners volunteer for this service.⁵⁶

Risk and Protective Factors for Psychological Readiness at Seven Weeks

Based on the standardised psychometric screening algorithms, a number of submariners met criteria for acute stress reactions (e.g. adjustment disorders, PTSD) and were offered further psychological counselling.⁵⁷ In only half of the cases counselling focused primarily on submarine-related concerns; the other half primarily focused on unrelated personal life management difficulties (i.e. RSS) triggered by the incident. By about eleven weeks after the incident, only a small number were still receiving continuing support (for reasons not directly related to submarines), with the rest managing their concerns appropriately. Individual processing of grief – for the entire submarine community – continued.

Psychological responses after the incident were moderated by several factors.⁵⁸ For example, chi-square analysis revealed that difficult short-term adjustment was significantly associated with:

- A history of pre-incident difficulties (existing adjustment challenges unrelated to submarines, most typically RSS);
- A history of multiple and/or recent losses;
- A history of previous trauma in the preceding three years; and/or

- Co-occurrence of other significant phase-of-life adjustments (e.g. new parenting).

Given the known risk posed by previous traumatic experiences,⁵⁹ it was noteworthy that almost a quarter of the submariners who participated in the screening reported a history of trauma in their personal life in the preceding three years – a figure comparable to SA population statistics.⁶⁰ Statistical analysis also indicated that previous trauma significantly increased the likelihood of submariners screening positive for an adjustment disorder, but not for other psychological disorders.

Submariners who reported a history of family crises that interfered with performance at work in the preceding three years were also at significantly increased risk of adjustment disorder. In contrast, higher scores on the resilience scale (collected previously) were associated with a significantly smaller likelihood of adjustment disorder.⁶¹ The risk of poor post-incident adjustment posed by family concerns point to the critical role that military social workers can play by proactively supporting submariners and their families in their adjustment throughout life.

Risk and Protective Factors for Psychological Readiness at Seven Months

Seven months after the incident, all cases of PTSD had been resolved, and only a small number of the participating submariners still experienced adjustment difficulties. These figures are fairly typical for similar groups,⁶² and the mental health profile of the squadron could be considered to have returned to its original pre-incident status. Positive mental health outcomes were associated with enrolment into psychological counselling.⁶³

The submarine sample mean score on the Coping Self-Efficacy Scale⁶⁴ was significantly higher than any available international or SA civilian samples,⁶⁵ indicating a high sense of coping efficacy among the submariners. Further, lower scores on the coping self-efficacy scale were associated with a significantly higher likelihood of adjustment disorder.⁶⁶

At seven months after the incident, only one risk factor was still statistically associated with adjustment difficulties, namely a history of pre-incident difficulties. Any remaining concerns about the longer-term psychological readiness thus represented RSS that were unrelated to submarine duty.

Course of Post-Incident Mental Health

Table 1 above presented the general population estimates for the course of psychological adaptation after exposure to severe stress. Based on the same criteria used for the general population,⁶⁷ it was estimated that the majority of the squadron displayed either a “Resistance” or “Resilience” profile. Encouragingly, no “Delayed dysfunction” profiles were observed by seven months after the incident. The SAN estimates presented in Table 1 are only that – estimates calculated using probability statistics, and are included in the table to illustrate the relative distribution of profiles.

Compared to general population expectations, the SAN estimates in Table 1 suggest a positive collective mental health status seven months after the incident. This could be attributed to a number of factors. As noted earlier, SAN submariners are resilient individuals,⁶⁸ and the resilience scores from their most recent MSPS before the incident were significantly higher than the average for general civilian populations.⁶⁹ Resilience, per definition, refers to the ability to “bounce back” after adversity, and this was clearly demonstrated in this group. Further, submariners participate in a biennial MSPS, which would have facilitated good premorbid adaptive functioning. High group cohesion (associated with the tight-knit submarine squadron), and substantial post-incident support from the Fleet and their own families, were identified from their screening responses as instrumental in their adjustment after the incident. Lastly, intensive psychological intervention to those in need supported their good recovery.

Current Issues Regarding Psychological Readiness for Submarine Operations

Against the background of the case study, a number of insights regarding psychological readiness for submarine operations came to the fore.

Current state of Readiness

At the time of the incident, members of the submarine squadron were certified as medically fit, and thus presumably possessed adaptive personality configurations, resilient life orientations, and good mental health. A more detailed view of the collective status of the squadron at seven weeks emerged however when assessed against the three criteria for psychological readiness: clinical mental health, general adaptability, and responsive support systems. Several cases of concern were identified, although most had been resolved by seven months.⁷⁰

By seven months, the situation had stabilised considerably. Clinical mental health levels were within normal range, and submariners reported effective mobilisation of their personal and social support systems.⁷¹ This resulted in adaptive functioning and high confidence in their coping strategies, and indicated good psychological readiness for operational duty. That so few cases of concern – out of the whole squadron – remained by seven months is a testament to the ability of members of the squadron to mobilise their coping resources – both individually and collectively – to recover from their shared tragedy.

Take-Home Insights and Lessons

A number of insights were gained from the experience following the submarine incident:

- The collective state of psychological readiness of any ship or submarine is contingent on the timing of such assessment. In the above example, screening at seven weeks did not offer a convincing estimate of the longer-term psychological readiness of the squadron. In contrast, screening at seven months provided a more accurate indication of long-term adjustment than at seven weeks. The seven-week screening was however crucial in identifying

individuals in need of targeted support, which in turn facilitated the eventual positive outcome. The optimal time to assess psychological readiness may depend on many circumstances, including the severity of the collective adverse experience, the availability of both post-incident personal family support and formal mental health assistance, the degree of organisational recognition of the incident, and the time-sensitive nature of operational responsibilities.

- Targeted selection remains vital to ensure appropriate baseline personality and other psychological configurations that would promote psychological readiness for submarine operations. Appointing individuals with the prerequisite personality traits adaptive to the context of submarine operations, as well as with a resilient orientation to life, is critical. This would support both the continuing mental wellbeing and the psychological readiness of submariners to continue their operational duty competently and safely.
- An appropriately structured and resourced biennial MSPS remains critical to maintain continuous wellbeing and psychological readiness. The MSPS supports timeous identification and referral of cases requiring intervention, and salutogenically facilitates effective coping and enhancing adjustment throughout submariners' careers.
- The apparent protection – against more severe forms of poor mental health outcomes – offered by higher resilience has two practical implications. Firstly, it emphasises the importance of evaluating psychological resilience and directing sailors with lower resilience towards appropriate service providers to assist in strengthening their resilience. Secondly, the protection offered by resilience provides motivation for resourcing initiatives to develop resilience in group settings, for example through coping skills and resource activation training. In addition, the involvement of military social workers in assisting submariners to develop both family resilience and other support systems outside of their immediate workgroups, remains a priority.
- The role of previous traumatic experiences as risk factor for poor mental health outcomes was confirmed in the SAN submariner sample.⁷² The confirmation of this risk factor has two practical implications. Firstly, it highlights the importance of the biennial MSPS to screen for the existence of recent traumatic experiences, and then to direct such sailors to the appropriate support services. Secondly, it suggests the need for close monitoring of such individuals after adverse occupational-specific events to ensure early identification and management of maladaptive psychological responses.
- The presence of RSS was again associated with poor adjustment in this sample. This can also be viewed as an indicator of poor psychological readiness in general. Timeous management of RSS by military social workers could both reduce the risk of poor post-adverse incident outcomes, and enhance the general reliability of personal readiness.
- Screening after traumatic or adverse occupational-specific incidents typically focuses on PTSD as the main indicator of psychological outcomes, also in submarine accidents.⁷³ It may however be productive to broaden such screening

to include other maladaptive outcomes, such as adjustment disorder (and others), which may offer a more accurate reflection of the actual mental health status of the group than PTSD alone.

- Optimal psychological intervention after adverse incidents – as in this example – requires early and sustained professional involvement. This in turn requires substantial resources, which may not always be available, but the outcome after seven months does suggest that such expenditure of resources is worthwhile.

Future Research Directions

Future research could explore the synergy between clinical and organisational psychology in the SAN. For example, the MSPS promotes psychological resilience, which in turn enhances team cohesion, morale, and operational continuity. These qualities indirectly support leadership and role performance, suggesting that clinical interventions may benefit broader organisational stability. Examining the interaction between individual mental health and unit efficacy, as well as its effect on overall organisational performance, presents a valuable direction for future studies.

Conclusion

Psychological readiness for operations at sea is a crucial aspect of the ability of submarine personnel to perform their duties effectively and ensure mission success, while safeguarding their own mental wellbeing. At IMM, three criteria are used to assess this. Firstly, good clinical mental health – visible in the absence of psychopathology that would interfere with performance on a submarine – is imperative. Secondly, good adaptability – reflected in a resilient life orientation, adaptive personality configuration, and the capacity to mobilise coping skills and resources – remains vital. Thirdly, the presence of responsive support systems continues to be indispensable.

This article presented risk and protective factors that contributed to the adaptation and return to readiness of submarine personnel after an adverse occupation-specific event. Early risk factors (seven weeks after the event) included a history of pre-incident RSS, multiple or recent losses, previous trauma exposure, and the co-occurrence of other phase-of-life adjustments. Higher scores on a resilience measure emerged as a protective factor. By seven months after the event, a history of pre-incident RSS remained a risk factor to psychological readiness, while coping self-efficacy, and enrolment into psychological counselling were associated with good adjustment.

The collective psychological status of the SAN submarine squadron seven months after a tragic incident displayed a remarkable level of resilience, and reflected a readiness to continue operational duties. Against this background, the recent submarine incident underscored the necessity of timely psychological assessments and the value of a supportive infrastructure to facilitate mental health resilience. The SA perspective on psychological readiness for submarine operations highlights the complexity and importance of mental health and other psychological constructs in demanding military environments. Lessons learned include the need for targeted selection, ongoing mental health screenings, and robust support systems.

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South African Defence Procurement: Challenges and Developments Thirty Years after Democracy

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Abstract

Research on South African public procurement is common, but defence procurement has received limited attention so far, despite its significant financial and operational impact. This is concerning considering the substantial discretion granted to defence-contracting authorities, and the ongoing issues of fraud, corruption, and tender irregularities within the Department of Defence and the South African National Defence Force. Given the constitutional requirement for public procurement to be fair, transparent, and cost-effective, there is a need for increased focus on the regulation of defence procurement. Accordingly, this article distinguishes between “acquisition” and “procurement” as the two forms of defence procurement in South Africa; identifies key challenges, such as the continued reduction in the defence budget by government; cost containment, project delays, and corruption; and reflects on the effect of the new Public Procurement Act (No. 28 of 2024). The article also offers recommendations for addressing these challenges and improving the defence procurement system, thus ensuring adherence to fairness, transparency, and efficiency. The research findings emphasised the importance of effective policy implementation to combat fraud and corruption, improve capacity, and align procurement practices with legal requirements; thus, enhancing the overall effectiveness of the South African defence procurement system.

Keywords: Defence Procurement, Department of Defence, South African National Defence Force, Procurement Challenges, Defence Budget, Public Finance Management Act (No. 1 of 1999), Public Procurement Act (No. 28 of 2024).

Introduction

South African (SA) public procurement is the subject of regular and robust research.¹ Compared to this, SA defence procurement, however, has not received the same level of attention.² This is rather concerning, given that defence-contracting authorities generally have a ‘wider than usual margin of discretion’³ than their civil public procurement counterparts, and defence spending comprises extremely large amounts of money.⁴ The defence environment is also known for its secrecy,⁵ and the Department of Defence (DoD) and the South African National Defence Force (SANDF) have been plagued by tender irregularities and allegations of corruption since its inception.⁶ Finally, the constitutional imperative that public procurement be done in accordance with a system that is ‘fair, equitable, transparent, competitive and cost-effective’⁷ requires public procurement practitioners and, especially those in academia, to increase their focus on SA defence

procurement regulation and policy.

Considering the above, and given that more than 30 years have passed since the creation of the SANDF,⁸ as well as the introduction of the new Public Procurement Act (PPA) (No. 28 of 2024), now is the opportune time to take a close look at SA defence procurement, and in particular, the challenges that the DoD and SANDF continue to face within this environment. This research therefore built on my previous research,⁹ and aimed to contribute to filling the gap that exists regarding research on defence procurement regulation and policy in South Africa.

Accordingly, the first part of this article briefly comments on the research framework and methodology adopted to develop the research presented in this article, and on the limitations of the research. The second part of the article explains the difference between the two categories of SA defence procurement. In the third part, several challenges within the SA defence procurement environment are identified and discussed. The penultimate part considers the influence of the regulatory regime in South Africa on defence procurement, with a specific focus on the new PPA. The article concludes with several recommendations for addressing some of the identified challenges. Important considerations taking into account the regulatory changes introduced by the PPA are highlighted. This evaluation is summarised in the schematic diagram below for ease of reference.

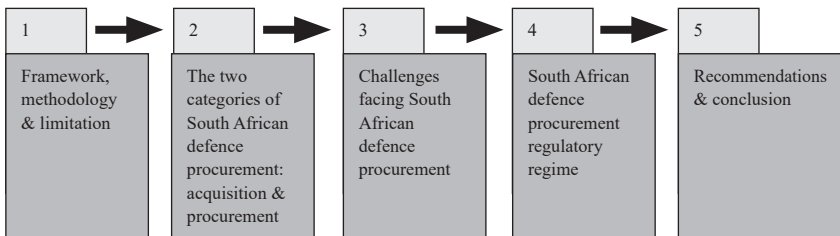


Figure 1: Schematic diagram for reference

Normative Framework, Research Methodology, and Limitations

The normative framework for the current research may be found in the principle of legality (or rule of law),¹⁰ the Constitution of the Republic of South Africa, 1996 (the Constitution), the statutes directly applicable to SA public procurement, as well as the broader idea of regulatory theory.¹¹ Accordingly, public procurement sits within the normative framework of law, which differentiates public procurement from other areas. Specifically, section 217 of the Constitution is applicable, which specifies that the procurement of goods, services and works required by the state to perform its functions is rooted in constitutionalism.¹² This is the foundational framework within which the current research was compiled, and against which the article must be considered.

Furthermore, the analysis reported on in this article followed the doctrinal legal research methodology. This method tends to dominate legal research design,¹³ and ‘encompasses legal problem or issue identification and formulation, finding and analysing the relevant legal materials, and the production of a research product in the form of briefs, memoranda, court pleadings, judgments, legislative Bills, [and] academic texts’.¹⁴ Ultimately, this method is ‘tacit within the [legal] discipline’.¹⁵

Finally, it is necessary to highlight the limitations of the study on which this article reports. Given the limited research within the field of SA defence procurement regulation and policy, the study did not entail a comparative analysis with other jurisdictions. Rather, it focused solely on the SA context and the challenges experienced in the defence procurement environment to contribute to scholarship in the area. Additionally, the challenges posed by national security, secrecy, and transparency are also not discussed, as there was insufficient scope within this study to do so.

Acquisition versus Procurement

According to Uttley,¹⁶ the armed forces of a state normally procure two categories of items, namely:

- Major weapons systems that are ‘purchased infrequently in small quantities at high unit costs’;¹⁷ and
- ‘[S]tandard’ civilian products that are ‘routinely purchased in large quantities at low unit costs.’¹⁸

South Africa is no exception, and distinguishes between category 1 and category 2 matériel.¹⁹

Category 1 matériel comprises ‘major weapons systems’ or so-called ‘hard defence goods’,²⁰ and is defined as:

[M]aterial, components, product sub-systems and products that are *configured into a military system* that forms part of a defined military capability. A military system is designed and developed directly to military requirements and acquisition standards; contracted upon military authority; managed on a through life concept [*sic*] by a military authority for military use/purposes, and depends upon militarised logistic support that ensures its intended systems integrity.²¹ [author’s italics]

In relation to category 1, the terms “military systems” and “armaments” cannot be separated. **Armaments** are ‘equipment designed, modified, adapted or intended to equip security forces, or maintain and support military or security operations’.²² Armaments are part and parcel of the military systems, and category 1 matériel is acquired through the process of **acquisition**.²³ The funds for acquisition are budgeted for on the Financial Management System (FMS) of the DoD,²⁴ which is supplied by the Special Defence Account (SDA).²⁵ The operating funds however come from the General Defence Account (GDA), also budgeted for on the FMS.²⁶

Category 2 matériel is defined as:

[C]ommercial equipment, components, parts and supplies available on the open market [...]. Category 2 Matériel is items and systems which are designed and developed primarily for the commercial market and is not configured to form part of a military system. These items may be used, operated and supported without any adaptation in the military environment.²⁷ [author's italics]

Commercial goods and services are obtained through the **procurement** process, by means of GDA expenditure, as budgeted for on the FMS.²⁸

The effect of the above is that “defence procurement” is an umbrella term denoting two distinct processes. I, therefore, define SA defence procurement as follows:

It is an overarching term denoting two distinct procedures within the context of the South African military. It can refer to either the acquisition of category 1 matériel (primarily armaments and military systems) or the procurement of category 2 matériel (commercial goods and/or services).²⁹

The challenges identified and discussed in the next section can be found in either the acquisition or procurement environment, or in both. Accordingly, it is important that readers understand the challenges taking into account the background and explanation provided here.

Prevailing Challenges within the South African Landscape

General

Globally, at least six widely encountered challenges or trends can be identified across the defence procurement system of more than one state.³⁰ Of these six challenges or trends, at least four also appear within the SA context,³¹ in conjunction with other challenges. The discussion below therefore aims to highlight and discuss briefly the key challenges or trends that exist (or continue to reappear) within the SA landscape.

Budget

The defence budget is a vital component of defence procurement, seeing that it is the defence budget, which provides the funds for the acquisition and procurement of goods and services.³² With an annual allocation of less than 1 per cent of the gross domestic product (GDP), the defence budget has been cut to the bare bone over the last decade,³³ despite the globally accepted norm that at least 2 per cent of the GDP should be allocated to defence spending.³⁴ In the light of the above, the Minister of Defence and Military Veterans has for a number of years complained that the DoD lacks the resources necessary to fulfil its mandate, a statement repeated by the Minister in more than one Annual Report.³⁵ It is also repeated by the Secretary for Defence and the Chief of the South African National Defence Force (CSANDF) in the DoD Strategic Plan 2020–2025.³⁶ The Minister specifically notes in the 2019–2020 Annual Report that the lack of funding has a direct impact on the acquisition projects of the DoD:

We are however now in a situation where the Defence budget has been cut beyond the bone – the Special Defence Account [...], is nearing its demise. This means that major acquisition projects for the landward forces and maritime forces are under serious threat from non-completion.³⁷

In the 2021–2022 Annual Report, it is noted that:

The downward trend over multiple years in the Defence budget allocation has not yet been abated. This [...] will have a detrimental effect on the Department of Defence, and [...] the South African National Defence Force, as well as the Defence industry.³⁸

Notwithstanding the above, several experts suggest that changes in the economy cannot be ignored, and that the DoD must bear some responsibility for the management and allocation of the defence budget.

First, Abel Esterhuysen, John Stupart and Clive Coetzee write that the DoD must reconcile itself with the fact that it will not receive more funds.³⁹ According to Esterhuysen, the 2015 *Defence Review* was drafted in 2014 when the SA ‘economic outlook was sustainably better’.⁴⁰ Moreover, the Review itself was ‘deliberately drafted without considering the costs and threats facing the country’.⁴¹

Second, Esterhuysen argues that placing the blame for the DoD (and SANDF) problems on a lack of funds implies taking the ‘easy way out’.⁴² The DoD is not likely to get an increase in funds. In this regard, the Minister of Finance has responded in 2021 to recommendations by the Portfolio Committee on Defence and Military Veterans (PCDMV) for additional funding for:

- Border security;
- The Special Defence Account; and
- The mid-life upgrade of South African Navy vessels by stating, ‘there is little scope to provide additional funding at this time and fiscal constraints require departments to identify opportunities for reprioritisation’.⁴³

Third, Esterhuysen argues that the division of the budget is incorrect, because, as a guideline, defence forces accept that, irrespective of the size of their budget, it should be divided into more or less equal portions between personnel, operational, and capital expenditure.⁴⁴ At the time, however, almost 80 per cent of the SA defence budget went towards personnel expenses, with limited money available for capital projects.⁴⁵ While this percentage has decreased since, compensation of employees (CoE) was estimated at 64 per cent of the budget for the 2023–2024 financial year.⁴⁶ In the same article, Esterhuysen suggests that the SANDF should look to its failure to implement an ‘up-or-out personnel management system’.⁴⁷ In this regard, in a typical hierarchical personnel system, most uniformed personnel should have left service by the age of 30. Yet, in 2025, South Africa had ‘69 392 “active” personnel in the national defence force, with an average age of 39’.⁴⁸

Fourth, Lindy Heineken highlights the negative consequences of rank inflation.⁴⁹ This refers ‘to having too many people in the senior ranks disproportionate to the numbers in the lower ranks. *This makes the cost of the top band personnel excessive.*’⁵⁰ Similarly, Darren Olivier noted in 2025 that information about the SA military personnel ‘exposes a critical structural imbalance in the SANDF, with an inverted junior/senior officer structure, poor NCO [non-commissioned officer] ratios, and far too few junior enlisted compared to other forces’.⁵¹

Finally, the SANDF has been criticised for failing to put forward innovative strategies to maintain and operate the armed forces within the current budget. According to a PCDMV statement, ‘despite previous commitments the committee noted the repeated failure to deliver a fresh, effective strategy to reverse the decline’.⁵²

Accordingly, it would seem as if personnel are getting too old, the size of the personnel complement is too large, too much is spent on CoE, and there is an accountability failure on the part of the DoD and SANDF. Ultimately, several budget issues are personnel-related.

It is, however, a fact that a further reduction in the defence budget will have severe and negative consequences for the DoD. Janse van Rensburg noted in 2021 that the decline of the budget ‘is really problematic in the maintenance of a professional military force’.⁵³ In this regard, the Minister of Defence and the DoD are right to emphasise the strain placed on performance through the decline of the budget. In 2022, former shadow Minister for Defence, Kobus Marais, noted that the budget should increase over the Medium-Term Expenditure Framework (MTEF) to 1 per cent of the GDP to help address the decline of the SANDF.⁵⁴ In 2024, Moses Khanyile, the Director for Centre for Military Studies, provided a presentation to the PCDMV titled “Addressing Contemporary Challenges in the SANDF”, which ultimately required the committee to ask:

- Whether the SANDF is fit for purpose in relation to current operations;
- What the actual budgetary requirement for the SANDF is; and
- Whether there is a risk of total collapse of the SANDF.⁵⁵

In addition, Khanyile emphasised that 2 per cent of the GDP is a national norm for a sustainable defence force.⁵⁶ Finally, in 2025, James Kerr analysed the reasonability of an increase in SA defence spending to at least 1,5 per cent of the GDP, and the potential stabilising effects this may hold for SA defence.⁵⁷

Accordingly, the reduction in the SA defence budget remains the biggest challenge in terms of defence matters generally, and in terms of defence procurement specifically.

Cost-Containment and Project Delays

Adding to the budget woes of the department is failure by the DoD to contain the costs associated with procurement and acquisition. SANDF procurement staff at unit level often complain about the length of procurement processes and constant delays.⁵⁸ Two key examples illustrate this point.

First is Project Hoefyster that was supposed to deliver 264 Badger vehicles⁵⁹ to partially replace the aging Ratel fleet.⁶⁰ The project came into effect in June 2007 with delivery expected in May 2012.⁶¹ This was then supposed to be followed ‘by phase two – industrialisation and production of 238 Badgers – with a completion date of November 2023’.⁶² By May 2020, the project was 45 months behind schedule,⁶³ and by 2022, no vehicles had been delivered to the South African Army.⁶⁴ By 2022, a total of R7,6 billion had been spent on the project; ‘R1,5 billion spent on the design and development phase, and R5 billion on the industrialisation phase’.⁶⁵ To date, the Armaments Corporation of South Africa SOC Ltd (Armscor) (the acquisition agent of the DoD) values the project at approximately R16 billion. Given these challenges, Armscor at some point recommended cancellation of the project.

In August 2022, the PCDMV was however informed that Armscor and Denel had in fact reached an agreement on the way forward,⁶⁶ and in February 2024, the committee was informed that, based on the decision taken by the Project Hoefyster control board in April 2023, the contracts for both phase one and phase two were to be amended.⁶⁷ In November 2024, the Chief of the South African Army however announced that:

Where we are standing with all the role players Hoefyster has been deferred in the simple terminology [...] it has been paused, not stopped.⁶⁸

The Project Hoefyster woes thus continue.

Second, Project Hotel was supposed to provide, inter alia, for the construction of a hydrographic survey vessel. Despite the contract being signed in 2017, by May 2020, it was 11 months behind its scheduled completion date of November 2022.⁶⁹ While Armscor updated the completion date in February 2022 to April 2023,⁷⁰ the date was once again extended to the ‘end of 2023, or early 2024’ in October 2022.⁷¹ This did not materialise and by May 2024, the overall project progress was at ‘75% of completeness’, with the vessel itself only ‘55% complete’.⁷²

Accordingly, South Africa, like other states, appears to experience the same trends in terms of cost containment and delays.⁷³

Tender Irregularities, Fraud, and Corruption

From the Strategic Defence Procurement Package (the so-called “Arms Deal”) in 1999⁷⁴ through to the procurement of the immune booster, Interferon, from the Republic of Cuba in 2020,⁷⁵ the financial state of the DoD is worsened by the continued prevalence of tender irregularities,⁷⁶ fraud, and corruption. The SA media regularly report on this challenge,⁷⁷ and in May 2022, the Provost Marshal General, Rear Admiral Mokgadi Maphoto, revealed defence corruption and fraud (not just relating to defence procurement) amounting to R2,243 billion in total.⁷⁸ Furthermore, the DoD Annual Report for 2023–2024 indicates:

[Irregular expenditure] to the amount of R338 million was incurred during the year under review [with, among others] [...] R171 million [...] incurred when the Department procured Goods and Services without following the South African Procurement Legislation [and] R46 million [...] incurred when the

Department entered into a lease agreement without following a transparent procurement process.⁷⁹

It is difficult to comprehend the inability of the department to address this challenge or to explain if one considers the points below.

First, the DoD acquisition and procurement policies, in conjunction with the Armscor acquisition policies, list the clear step-by-step processes that must be followed when contracting for goods, services and works.⁸⁰

Second, the majority of instances of irregular expenditure are within the ‘uniformed officers’ Department’,⁸¹ and not the Defence Secretariat.⁸² This means within the SANDF, where uniformed personnel are subject to strict military discipline⁸³ that requires lawful orders to be obeyed and rules to be followed.⁸⁴

Finally, the DoD issues a Department of Defence Instruction (DoDI) with each of its internal policies that govern procurement of commercial goods and services and the acquisition of armaments. These DoDIs contain important principles regarding defence procurement integrity, conflicts of interest, and accountability. More importantly, these DoDIs comprise written legal military orders under section 19(5)⁸⁵ of the Military Discipline Code (MDC)⁸⁶ with which uniformed personnel involved within this specific environment must comply.⁸⁷ It is, therefore, unclear why financial misconduct relating to procurement and acquisition occurs, or why there seems to be a culture of disregard for proper procurement procedures and rules.

Training, Experience, and Capacity

The DoD also appears to have a shortage of skills, affecting the ability of the department to deal efficiently with defence procurement. In a briefing to the PCDMV on 26 October 2016, the Chief of Logistics (C Log), Lt Gen Morris Moadira, said that the biggest challenge in the DoD was a skills gap, often resulting in irregular expenditure.⁸⁸ In this regard, the compliance unit of the DoD Internal Audit Division and Supply Chain Management (SCM) compliance unit reported on 8 June 2022 that a number of procurement units that had a standing mandate to procure, lacked the basic SCM training to do so.⁸⁹ Further, some of the units operated without bid committees,⁹⁰ had inadequate ‘tools of trade’,⁹¹ operated without proper delegation,⁹² and duties were not segregated properly between officials.⁹³

While this is in line with global trends,⁹⁴ it also highlights that the DoD is not complying with the Public Finance Management Act (PFMA) (No. 1 of 1999): Treasury Regulations for Departments, Trading Entities, Constitutional Institutions and Public Entities 2005 (PFMA NT Regulations 2005).⁹⁵ Regulation 16A5.1 specifically requires competent and trained staff in line with the ‘requirements of the Framework for Minimum Training and Deployment issued by the National Treasury’. Similarly, functioning without bid committees is in violation of Regulation 16A6.2.

Payment of Invoices within 30 Days

Regulation 8.2.3 of the PFMA NT Regulations 2005 provides:

Unless determined otherwise in a contract or other agreement, all payments due to creditors must be settled within 30 days from receipt of an invoice or, in the case of civil claims, from the date of settlement or court judgement.

In 2011, National Treasury issued National Treasury Instruction No. 34 of 2011,⁹⁶ which states that, with effect from 1 February 2012, all national departments must –

[P]rovide the National Treasury each month with exception reports on the number of invoices and the value thereof that have not been paid within thirty (30) days from receipt together with reasons for not making the payments timeously.⁹⁷

Finally, paragraph 3.10 of the National Treasury Instruction Note on Enhancing Compliance Monitoring and Improving Transparency and Accountability in Supply Chain Management⁹⁸ states that the payment of invoices outside the prescribed 30-day period is viewed as a violation of Regulation 8.2.3, and may be reported by the Auditor-General of South Africa (AGSA) as part of their audit function. National Treasury also releases an annual report on compliance with the payment of invoices.⁹⁹

The last decade has seen the DoD report several challenges in this regard. In September 2013, the Secretary for Defence, Dr Sam Gulube, informed the Standing Committee on Appropriations that the DoD had made the payment of invoices within 30 days a priority,¹⁰⁰ and that he had ‘made himself available for contact directly should suppliers be too afraid to raise the payment issue for fear of victimisation’.¹⁰¹ In October 2016, the C Log commented, that ‘the payment of suppliers within 30 days’ remained a challenge, and that so-called “payment forums” had been established.¹⁰² In June 2021, the PCDMV once again heard that ‘the main challenge faced by the Department was the payment of invoices within 30 days’.¹⁰³ Finally, for the financial year 2023–2024, National Treasury indicated:

The Department of Defence reported the highest number of invoices paid after 30 days which amounted to 84 934 invoices or 78% of the total invoices paid after 30 days by national departments in the 2023/24 financial year.¹⁰⁴

This amounted to R1,407 billion.

These facts illustrate that the DoD is in violation of Regulation 8.2.3, and appears to have made little progress in resolving the matter.¹⁰⁵ If urgent action is not taken, the DoD appears likely to persist in its failure to comply with the relevant financial prescripts.

Regulation

A Fragmented System

South African defence procurement does not have its own regulatory regime. In the words of Phoebe Bolton, '[s]ubject to a few exceptions, the same legislation and rules apply to civil goods and services, dual-use or grey-area goods and services; and hard-defence goods and services.'¹⁰⁶ The DoD must, therefore, comply with the ordinary public procurement regulatory regime, several internal DoD policies, as well as legislation, such as:

- the Armaments Corporation of South Africa, Limited Act (No. 51 of 2003);
- the Defence Act (No. 42 of 2002);
- the Defence Special Account Act (No. 6 of 1974); and
- the National Conventional Arms Control Act (No. 41 of 2002).

Even if the PPA therefore reduces the fragmentation of the ordinary (civil) public procurement regulatory regime, defence (military) procurement regulation will always maintain a certain level of fragmentation considering the various statutes and policies that apply within this environment.

In addition, the current regulatory regime presents various challenges for the DoD, and the future is uncertain in light of the introduction of the PPA.¹⁰⁷ This is considered below.

Department of Defence Internal Regulation

Apart from the broad legislative mandate that applies, defence procurement is also regulated by numerous internal policies, as shown above.

Category 1 matériel acquisition is subject to:

- The Ministerial Directive on Acquisition of Armaments in the Department of Defence;
- The Policy on the Acquisition of Armaments in the Department of Defence (a DoDI); and
- The Department of Defence Handbook for the Acquisition of Armaments in the Department of Defence and in Armscor (DAH B 1000).¹⁰⁸

Category 2 matériel procurement is subject to:

- The Policy on Procurement and Sales in respect of Commercial Goods and Services (a DoDI);
- The Joint-Defence Publication on the Process and Procedures for Procurement and Sales in respect of Commercial Goods and Services (PPCGS); and
- The Functional Planning and Budgeting Guidelines of the Matériel Governance Risk and Compliance Directorate.¹⁰⁹

While the DoD has managed to update the internal policies and procedures applicable to category 1 acquisition continuously, the same cannot be said of category 2 procurement.¹¹⁰ This introduces the first challenge presented by regulation.

Challenges under the Current Regulatory Regime

The first challenge is that the DoD finds it difficult to keep up with the changing pace of the current regulatory regime. Since the commencement of the Preferential Procurement Policy Framework Act (No. 5 of 2000) on 3 February 2000, there have been four separate sets of regulations, namely the 2001,¹¹¹ 2011,¹¹² 2017,¹¹³ and 2022 Preferential Procurement Regulations.¹¹⁴ This challenge is especially evident within the context of category 2 matériel procurement.

By August 2023, the category 2 matériel procurement DoDI and PPCGS had not been officially updated since 1 August 2004 and still “officially” referred to the 2001 Regulations.¹¹⁵ Other policies that apply within this area, including the Functional Planning and Budgeting Guidelines of the Matériel Governance Risk and Compliance Directorate,¹¹⁶ were nevertheless updated over time.¹¹⁷

To accommodate the changes introduced to defence procurement as a whole by the 2022 regulations, the DoD introduced the DoD Interim Policy on Preferential Procurement in the DoD in January 2023.¹¹⁸ This policy was implemented by means of DoD Implementation Instruction: 03/2023 Process and Procedures for Preferential Procurement in the DoD dated 23 January 2023, and SANDF (C Log) Implementation Instruction: Implementation of DoD Implementation Instruction No. 03/2023: Process and Procedures for Preferential Procurement in the DoD dated 26 January 2023.¹¹⁹ The latter instruction was issued by the C Log specifically in relation to category 2 matériel procurement. This leads to the next challenge.

The second challenge is that the DoD wholly deviates from Regulation 16A4.1 of the PFMA NT Regulations 2005, which provide that:

The accounting officer or accounting authority must establish a separate supply chain management unit *within the office of that institution's chief financial officer*, to implement the institution's supply chain management system.
[author's italics]

Considering this provision, the Secretary for Defence must establish the SCM unit (category 2 matériel procurement) within the office of DoD Chief Financial Officer (CFO), who is then supposed to report to the Secretary for Defence as Accounting Officer (AO). Contrary to other departments of state, the DoD CFO however fulfils no role within the SCM function.¹²⁰ Rather, the C Log, who is responsible for logistics, assumes overall responsibility for the SCM function.¹²¹ While placement of SCM under the C Log appears to be accepted military practice,¹²² it poses a challenge from a regulatory and financial point of view, as there is no specific statutory provision that recognises this authority of the C Log. The AGSA and the PCDMV have therefore criticised the circumvention of Regulation 16A4.1.¹²³

Developments (and Challenges) under the Public Procurement Act

Categories of Procurement

The Public Procurement Act (PPA) (No. 28 of 2024) defines procurement in terms of different types of procurement. According to section 1 of the PPA, “procurement” means:

- (a) ‘the acquisition of goods or services for construction, repair or maintenance of infrastructure or capital assets;
- (b) the acquisition of goods or services, other than goods or services referred to in paragraph (a);
- (c) the acquisition of infrastructure or capital assets; and
- (d) the letting or disposal of assets.’

Accordingly, the PPA recognises three basic types of procurement, namely goods and services for consumption; infrastructure and capital assets and goods or services related to infrastructure and capital assets; and the letting and disposal of assets.¹²⁴

It should be noted that the SA defence procurement system includes all three of the above-mentioned types of procurement. Through category 1 acquisition and category 2 procurement, the system allows the DoD – and particularly the SANDF – to acquire everything from food, clothing and buildings (sometimes also leased through the Department of Public Works and Infrastructure), to specific military capabilities (and their maintenance) in order to be an operationally deployable military force.¹²⁵

Furthermore, section 8 of the PPA requires a procuring institution to conduct procurement in accordance with the Act and to develop and implement an effective and efficient procurement system in accordance with the provisions of a prescribed framework.¹²⁶ Ronald Watermeyer, Jonathan Klaaren, and Samuel Laryea, however, claim, ‘[the Act] is weak on guiding principles for the procurement framework, leaving much of the shape and nature of the procurement framework to be developed through regulations and instructions, and not through statute’.¹²⁷ The authors also argue, ‘[d]ifferentiated regulations according to type of procurement are very much on the table’, and suggest that section 63(7)(a) ‘permits the Minister to make regulations for different categories of procurement’.¹²⁸ This poses an important question for the current researcher, namely should the Minister of Finance consult with the Minister of Defence and Military Veterans, the Secretary for Defence and CSANDF, as well as practitioners and academic scholars, and use this power to draft and implement a set of regulations unique to the military environment?

In plain terms, should there be a specific set of regulations that cater for the uniqueness and multifaceted nature of defence procurement, and which recognises it as an additional type of procurement?

It was beyond the scope of the current study to provide an answer to this question; however, it is an important one to consider in future research.

The Role of the Chief of Logistics

Section 1 of the PPA holds that AO means ‘in relation to a department ... the accounting officer as defined in section 1 of the Public Finance Management Act’. Section 1 of the PFMA refers to section 36(2)(a) of the PFMA, which states, ‘[the] head of department must be the accounting officer for the department.’ Within the DoD, this means that the Secretary for Defence serves as AO. Under the new PPA, the Minister of Finance must prescribe a framework (see section 24(1)) within which a procuring institution, such as the DoD, must develop and implement a procurement system (section 8(1)(b)), and the Secretary assumes overall responsibility for making decisions on behalf of the DoD under section 7 of the PPA.

Importantly, section 8(1)(b) read with section 24(3)(b) of the PPA prescribes that the procurement system must provide for ‘institutional and governance arrangements’. This formulation is broad enough for one to argue that the PPA no longer requires the SCM function to fall under the purview of the CFO. Indeed, the new PPA would allow for the Secretary for Defence to continue delegating the SCM function to the C Log without it presenting the same regulatory challenges as before.

Definition of National Security

The inclusion of national security in the PPA is a new development in SA public procurement regulation. While not new to the defence environment, it is a term with which ordinary public procurement practitioners per se would not be familiar.¹²⁹ This begs the question, where does the definition in the PPA come from? Is it a definition that Treasury drafted on its own, or was inspiration drawn from other legislation? If it is the latter, why is there no cross-reference?

The definition of national security appears to be drawn from, among others, the National Strategic Intelligence Act (NSIA) (No. 39 of 1994). The only difference is the layout of the definition in the two Acts. The failure to include a cross-reference could nonetheless lead to interpretation errors, as it is the first time that this concept appears in procurement legislation.¹³⁰ A cross-reference to the NSIA, for example, could have assisted in giving procurement practitioners both broader context and meaning in terms of the concept and its implications going forward.

Definition of Military Veteran

Section 1 of the PPA holds that “military veteran” ‘means any South African citizen who rendered military service to any of the non-statutory military organisations which were involved in South Africa’s Liberation War from 1960 to 1994’. Again, the question can be asked whether Treasury on its own decided what constitutes a military veteran for purposes of preferential procurement, or whether the definition comes from other legislation.

In this regard, Treasury appears to have drawn the definition from section 1 of the Military Veterans Act (No. 18 of 2011), which defines a military veteran as:

[A]ny South African citizen who –

- (a) rendered military service to any of the military organisations, statutory and non-statutory, which were involved on all sides of South Africa’s Liberation War from 1960 to 1994;
- (b) served in the Union Defence Force before 1961; or
- (c) became a member of the new South African National Defence Force after 1994, and has completed his or her military training and no longer performs military service, and has not been dishonourably discharged from that military organization or force [...].

A further definition can also be found in clause 4.6 of the Broad-Based Black Economic Empowerment Defence Sector Code of Good Practice in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act (No. 53 of 2003) as amended by Act 46 of 2013 (Defence Sector Code), which defines “Black Military Veterans” as:

[A]ny Black South African citizen who:

- 4.6.1 rendered military service to any of the Non-Statutory Military Organizations, which were involved in South Africa’s Liberation War from 1960 to 1994;
- 4.6.2 served in the Union Defence Force before 1961;
- 4.6.3 became a member of the new South African National Defence Force after 1994; [...].

These definitions read together indicate that the PPA definition is problematic for several reasons. First, Treasury has seen it fit to recognise only part (a) of the definition in the Military Veterans Act, and to limit this to citizens who served in the non-statutory forces.¹³¹ Meaning only those who served in Umkhonto we Sizwe (MK), i.e. the armed wing of the African National Congress, and the Azanian People’s Liberation Army (APLA), the paramilitary wing of the Pan Africanist Congress (PAC), is to be recognised for preferential procurement purposes. Second, those soldiers who served in the old South African Defence Force as well as the so-called TBVC¹ statutory forces are excluded from preferential procurement.¹³² Third, soldiers who both joined and retired from the SANDF after 1994, are excluded as well. Finally, the comprehensive definition of “Black Military Veterans” in the Defence Sector Code appears to have been ignored entirely.

The differences between the PPA and other legal instruments are irreconcilable, and likely to cause obstacles for fair and lawful administration of the PPA going forward.

Notwithstanding the above, the recognition of members of the non-statutory forces as military veterans also comes with the well-known challenge of determining whether the person served in the non-statutory forces. In 2015, Ian van der Waag noted, ‘[t]he non-statutory forces did not maintain detailed personnel records and the use of noms de guerre

¹ “TBVC” refers to Transkei, Bophuthatswana, Venda, and Ciskei, and is a term used to refer to the armed forces of four former homelands or “Bantustans” under the SA apartheid system.

was common practice.¹³³ Similarly, in relation to the Department of Military Veterans (DMV) database, Heinecken noted in 2019, '[t]he verification of all military veterans on the database is an ongoing concern. [...] The integrity of the database is also an ongoing concern as no electronic platform exists, which increases the potential for the abuse of the system.'¹³⁴ In this regard, the 2022–2023 Annual Report of the DMV states, '595 files of Non-Statutory Forces (NSF) members were processed by the National Military Veterans Verification Panel. The set annual target was 1 440 and therefore there is a deficit of 845 unprocessed files during the 2022/23 financial year.'¹³⁵

It is, therefore, safe to say that it is going to be difficult to determine whether a person claiming to have served in the non-statutory forces, and that they should therefore receive a tender for preferential procurement purposes, was indeed a member of the non-statutory forces.

Recommendations

Considering the general and regulatory challenges identified above, it is necessary to consider possible remedial action to address these challenges.

Before discussing specific recommendations, it should however be mentioned that the biggest obstacle to the effective functioning of the SANDF remains the SA defence budget. Of the five principles listed in section 217(1) of the SA Constitution, the defence budget, together with its severe constraints, puts more emphasis on the need for cost-effectiveness in the defence procurement process than it does within the context of ordinary civil public procurement. Indeed, the ever-decreasing size of the defence budget raises the issue of budget pressure to ensure optimal spending.

Considering the above, the following recommendations are made. The first recommendation, which is two-folded, relates to the budget. On the one hand, note should be taken of the fact that the Minister of Defence and Military Veterans has indicated that an increase to 2 per cent of the GDP is required. This has also been emphasised by members of the PCDMV and academic scholars. While the current author will not stipulate a specific percentage, he believes that government has a clear responsibility to consider that further budget cuts and unplanned and non-budgeted items for internal deployment of the SANDF stretches the DoD beyond its means.¹³⁶ The DoD needs a financial injection if it is going to address the decline of the SANDF.

On the other hand, it is vital that the DoD realise that its own hands are not tied. Annual allocation of resources to defence may be beyond its control, but the division of the budget is not. Considering the need to increase financial resources, the SANDF must reduce its personnel complement and its annual expenditure on CoE.¹³⁷ The reduction in CoE should be rechannelled towards operational and capital expenditure. This will allow increased funding for maintenance and/or replacement of the deteriorating military capabilities of the SANDF,¹³⁸ especially within the context of the Air Force and the Navy.¹³⁹

The second recommendation is for an external and independent audit of all SCM units.¹⁴⁰ This is necessary to address various concerns regarding the SCM training of DoD personnel, as well as the capacity of SCM units. A full-scale audit will identify both the physical and financial state of the units and indicate areas for improvement. In making this recommendation, it is necessary to note the 2021–2022 Annual Report, which states:

Although the initial plan was to audit all 73 procurement units, due to resource constraints, priority was given to key procurement units and 11 were audited by end of March 2022.¹⁴¹

The benefit of a full audit, nevertheless, outweighs the resource constraints. It is a once-off action that will provide a complete picture of all SCM Units. This will allow the DoD to formulate a single and consolidated strategy to address all SCM unit constraints.¹⁴² This recommendation also aligns with the view of former Minister of Defence, Thandi Modise, who wrote in the 2022–2023 Annual Report:

The single most prevalent challenge relates to the Defence Procurement System. We simply cannot continue with non-compliance in the procurement of goods and services. We have agreed that any form of corrupt activity must be rooted out and pursued vigorously. *The Acting Secretary for Defence, as the Accounting Officer, has been instructed to conduct a complete and rigorous review of the whole procurement system, to identify the root causes, and to put in place a robust and high integrity procurement system.*¹⁴³ [author's italics]

The third recommendation is that the Secretary for Defence as AO improve consequence management within the DoD and SANDF.¹⁴⁴ While this may seem daunting due to the internal accountability arrangements by the DoD presenting certain challenges for effective consequence management,¹⁴⁵ it needs to be done as a matter of great urgency. This is recommended by Parliament, the AGSA, civil society and others.¹⁴⁶ The AO however does not need to act alone. A well-functioning system of combined assurance involving Parliament, the AGSA, the Public Protector and the Military Ombud could assist.¹⁴⁷ In this regard, it is specifically argued:

Combined assurance requires one to focus on the system itself, not on its individual elements. Procurement is after all an administrative process. In this administrative process, we are not concerned with whether an individual element complied with good governance and the applicable regulatory framework; instead, one asks whether the elements together were able to ensure a fair and impartial administrative process. The same argument should apply to oversight of defence procurement. Instead of focusing on the ability of an individual mechanism to extract full accountability, one should ask whether all the mechanisms working in unison are able to achieve the target.¹⁴⁸

Accordingly, the Secretary for Defence, as well as Parliament, the AGSA, the Public Protector and the Military Ombud should increase collaboration and work in unison to extract full accountability from the DoD for defence procurement activities. Extracting full accountability¹⁴⁹ is 'achieved through all the different mechanisms working together, passing the baton from one to the other until the task of oversight [and consequence management] is complete'.¹⁵⁰

The fourth recommendation seeks to assist with the task of improved consequence management. The DoD should implement a new anti-corruption policy.¹⁵¹ This policy should directly address the continued fraud and corruption within the DoD, including within the context of defence procurement. Furthermore, the new policy must:

- Be accessible to the public on the official DoD website;¹⁵²
- Be undersigned by the Minister of Defence, the Secretary for Defence, and the CSANDF;¹⁵³
- Be in line with the constitutional and statutory frameworks applicable to the DoD;
- State that senior officials are required to lead by example, and that they should set the tone for anti-corruption behaviour;¹⁵⁴
- Define the scope of the fraud and corruption it aims to eradicate;¹⁵⁵
- State the specific accountability measures which the DoD and the SANDF have in place to prevent fraud and corruption; and
- State the consequences for those who have violated the policy and/or have been found guilty of fraud and corruption under the policy.¹⁵⁶

If implemented, the policy will allow for a unified approach to combatting military fraud and corruption and make it possible for both public officials and citizens to know what the official stance of the DoD is on fraud and corruption within the defence context.

Finally, the introduction of the PPA requires the DoD, like all organs of state, to conduct a thorough review of its regulatory policies and procedures. The DoDIs, policies and handbooks, which govern acquisition and procurement respectively, should be brought in line with the new PPA, and the DoD must implement its own procurement policy, including on preferential procurement, as required by section 16 of the PPA.

Conclusion

Defence procurement is a niche area of public procurement in South Africa and has for some time needed scholarly attention. The current study aimed to explore this area of the law and to shed light on the various challenges prevalent in it more than 30 years after democracy.

The DoD and the SANDF face numerous challenges, including a continued reduction in the defence budget; failure to contain costs of large projects and to complete projects on time; a lack of skills, training and capacity; continued tender irregularities; and the non-payment of invoices within the prescribed 30-day period. In this regard, while the budget appears to be the largest stumbling block, it cannot be the sole focus, as the DoD and SANDF have to accept responsibility for the failure to implement effective consequence management and curb defence-related corruption, which drains the coffers.

The introduction of the PPA, nevertheless, presents the DoD and SANDF with an opportunity to address the decline of the armed forces, especially within the context of defence procurement. The DoD must develop policies in line with the new PPA, which

allows for streamlined defence procurement practices that can be implemented effectively. In addition, the department must tend to the eradication of corruption, implement improved consequence management, and hold to account those who commit tender irregularities.

It is with the above in mind that future research in SA defence procurement regulation and policy should focus on the role of anti-corruption measures in the PPA, in conjunction with the Prevention and Combatting of Corrupt Activities Act (No. 12 of 2004). The purpose should be to test the effectiveness of these mechanisms within the defence and broader security environment. In addition, the role of military discipline, as envisioned in the Defence Act (No. 42 of 2002) and the MDC, in ensuring a disciplined force should not be overlooked either.

A well-functioning military with sufficient resources and an efficient (and corruption-free) procurement system is required to tackle the security issues of the day.

Endnotes

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- ¹ P Bolton, 'The Regulatory Framework for Public Procurement in South Africa', in G Quinot & S Arrowsmith (eds.), *Public Procurement Regulation in Africa* (Cape Town: Cambridge University Press, 2013), 192.
- ² Bolton, 'The Regulatory Framework for Public Procurement', 192; Heydenrych, *An Analysis of Defence Procurement*, 5.
- ³ Anonymous, 'Defence Procurement', SIGMA, 25 September 2011, 3. <https://www.oecd.org/en/publications/defence-procurement_5js4vmntfz0p-en.html> [Accessed on 2 March 2025].
- ⁴ The total expenditure indicated in the Department of Defence (DoD), 'Annual Report for the FY2022/2023', 2023, 26. <[https://nationalgovernment.co.za/department_annual/461/2023-department-of-defence-\(dod\)-annual-report.pdf](https://nationalgovernment.co.za/department_annual/461/2023-department-of-defence-(dod)-annual-report.pdf)> [Accessed on 2 March 2025] was R54,6 billion; Similarly, the Medium-Term Expenditure Estimates are R52,5 billion for 2023/2024, R51,8 billion for 2024/2025 and R53,8 billion for 2025/2026. (DoD, 'Annual Performance Plan 2024', 2024, 77–78. <<http://www.dod.mil.za/document/ReportsNav/Reports/Annual%20Performance%20Plan/DOD%20Annual%20Performance%20Plan%202024.pdf>> [Accessed on 2 March 2025]).
- ⁵ L Heineken, *South Africa's Post-Apartheid Military: Lost in Transition and Transformation* (Cape Town: UCT Press, 2019), 75; Heydenrych, *An Analysis of Defence Procurement*, 87–91, 252–263.
- ⁶ Notable examples include the Strategic Defence Procurement Package (SDPP) or "Arms Deal" of 1999, and the procurement of the immune booster Interferon from the Republic of Cuba in 2020 during the Covid-19 pandemic. See Heydenrych, *An Analysis of Defence Procurement*, 217–230, 237–246.
- ⁷ Section 217 of the Constitution of the Republic of South Africa, 1996 (Constitution).
- ⁸ The South African National Defence Force (SANDF) came into existence at midnight on 26 April 1994. Joe Modise (formerly the commander of uMkhonto weSizwe) was the first democratic Minister of Defence, and General Georg Meiring (formerly commander of South African military operations in South West Africa) the new Chief of the SANDF. (L Thompson, *A History of South Africa*, 4th ed. (Jeppestown: Jonathan Ball, 2014), 272).
- ⁹ Heydenrych, *An Analysis of Defence Procurement*; E Heydenrych, 'Re-evaluating Oversight of South African Defence Procurement: Can Combined Assurance Help Extract Full Accountability from the Department of Defence?', *Scientia Militaria*, 52, 2 (2024), 25–51.

- 10 ‘The doctrine of legality, which is an incident of the rule of law, is one of the constitutional controls through which the exercise of public power is regulated by the Constitution. It entails that both the Legislature and the Executive “are constrained by the principle that they may exercise no power and perform no function beyond that conferred upon them by law”. In this sense, the Constitution entrenches the principle of legality and provides the foundation for the control of public power.’ See *Masetlha v President of the Republic of South Africa and Another* 2008 (1) SA 566 (CC) para 80.
- 11 Regulatory theory examines how rules and mechanisms, either public or private, influence and shape behaviour. See CU Uche, ‘The Theory of Regulation: A Review Article’, *Journal of Financial Regulation and Compliance*, 9, 1 (2001), 67.
- 12 ‘Section 217 of the Constitution is the source of the powers and function of a government tender board. It lays down that an organ of State ..., if authorised by law may contract for goods and services on behalf of government. However, the tendering system ... must be fair, equitable, transparent, competitive and cost-effective. This requirement must be understood together with the constitutional precepts on administrative justice in section 33 and the basic values governing public administration in section 195(1).’ See *Allpay Consolidated Investment Holdings (Pty) Ltd and Others v Chief Executive Officer of the South African Social Security Agency and Others* 2014 (1) SA 604 (CC) para 31; ‘The norm-setting constitutional provision on the procurement ... is section 217(1) of the Constitution.’ See *Minister of Finance v Afribusiness NPC* 2022 (4) SA 362 (CC) para 97.
- 13 T Hutchinson & N Duncan, ‘Defining and Describing What We Do: Doctrinal Legal Research’, *Deakin Law Review*, 17, 1 (2012), 85.
- 14 M Nyathi, ‘Re-asserting the Doctrinal Legal Research Methodology in the South African Academy: Navigating the Maze’, *South African Law Journal*, 140, 2 (2023), 375.
- 15 Nyathi, ‘Re-asserting the Doctrinal Legal Research Methodology’, 376.
- 16 M Uttley, ‘Defence Procurement’, in DJ Galbreath & JR Deni (eds.), *Routledge Handbook of Defence Studies* (Oxfordshire: Routledge, 2020), 72. See also the discussion in A Migone, A Howlett & M Howlett, *Procurement and Politics: Strategies of Defence Acquisition in Canada and Australia* (Cham: Springer International, 2023), 1–4, 15.
- 17 For example fighter jets and munitions.
- 18 For example food, stationary and clothing.
- 19 “Military [equipment](https://dictionary.cambridge.org/dictionary/english/materiel) and [supplies](https://dictionary.cambridge.org/dictionary/english/materiel)”. See *Cambridge Dictionary*. 2025. <<https://dictionary.cambridge.org/dictionary/english/materiel>> [Accessed on 25 February 2025].
- 20 Bolton, ‘The Regulatory Framework for Public Procurement’, 192.
- 21 Heydenrych, *An Analysis of Defence Procurement*, 95–96.
- 22 Heydenrych, *An Analysis of Defence Procurement*, 96.
- 23 Heydenrych, *An Analysis of Defence Procurement*, 96.
- 24 Heydenrych, *An Analysis of Defence Procurement*, 96.
- 25 Established under section 1 of the Defence Special Account Act 6 of 1974.
- 26 Heydenrych, *An Analysis of Defence Procurement*, 96.
- 27 Heydenrych, *An Analysis of Defence Procurement*, 96.
- 28 Heydenrych, *An Analysis of Defence Procurement*, 96.
- 29 Heydenrych, *An Analysis of Defence Procurement*, 99.

- 30 (a) Cost-containment and project delays, (b) training, experience and capacity constraints, (c) lack of clear formulation of military requirements and specifications, (d) budget constraints or a continued reduction in allocation of a portion of the national budget to defence, (e) national security and secrecy leading to a lack of available information and (f) corruption. These challenges were drawn from a range of systems, including the United States of America, the United Kingdom, Canada and India. See S Markowski & P Hall, 'Challenges of Defence Procurement', *Defence and Peace Economics*, 9, 1/2 (1998), 3; S Perlo-Freeman & C Solmirano, *Why Arms Procurement Goes Wrong?* (Stockholm: Stockholm International Peace Research Institute, 2012), 1; K Hambleton, I Holder & D Kirkpatrick, 'Ten Chronic Challenges in UK Defence Acquisition', *Defence Studies*, 13 (2013), 361; A Khan & HS Jhaji, 'Challenges of Defence Procurement: A User Perspective', in LK Behera & V Kaushal (eds.), *Defence Acquisition: International Best Practices* (New Delhi: Pentagon Press, 2013), 88; T Taylor, 'Defence Procurement: Overcoming Challenges and Managing Expectations', in R Matthews (ed.), *The Political Economy of Defence* (Cambridge: Cambridge University Press, 2019), 258; AL Kimball, 'What Canada Could Learn from US Defence Procurement: Issues, Best Practices and Recommendations', *School of Public Policy Publication*, 8, 17 (2015), 1; O Kundu, 'Risks in Defence Procurement: India in the 21st Century', *Defence and Peace Economics*, 32 (2021), 343.
- 31 (a) Cost-containment and project delays, (b) training, experience and capacity constraints, (c) budget constraints and (d) corruption.
- 32 DoD, 'South African Defence Review 2015', 2015, 9-33–9-34, 14-16. <<https://static.pmg.org.za/170512review.pdf>> [Accessed on 2 March 2025].
- 33 The budget dipped below 1% in 2016 (0,97%) and has primarily remained below 1% since. See World Bank Group, 'Military expenditure (% of GDP) – Sub-Saharan Africa, South Africa', 2025. <<https://data.worldbank.org/indicator/MS.MIL.XPND.GD.ZS?end=2022&locations=ZG-ZA&start=2014>> [Accessed on 2 March 2025].
- 34 G Martin, 'Real Term Decline in "Disastrous" SA Defence Budget', *defenceWeb*, 21 February 2024. <<https://www.defenceweb.co.za/sa-defence/sa-defence-sa-defence/real-term-decline-in-disastrous-sa-defence-budget/>> [Accessed on 2 March 2025].
- 35 See DoD, 'Annual Report for the FY2018/2019', 2019, 8. <https://www.gov.za/sites/default/files/gcis_document/202002/dod-annual-report-fy2018-19-final-web-layout.pdf> [Accessed on 2 March 2025]; DoD, 'Annual Report for the FY2019/2020', 2020, 7. <https://www.gov.za/sites/default/files/gcis_document/202104/dod-annual-report-2019-20.pdf> [Accessed on 2 March 2025]; DoD, 'Annual Report for the FY2020/2021', 2021, 10. <https://www.gov.za/sites/default/files/gcis_document/202110/defenceannualreport202021.pdf> [Accessed on 2 March 2025]; DoD, 'Annual Report for the FY2021/2022', 2022, 5. <[https://nationalgovernment.co.za/department_annual/408/2022-department-of-defence-\(dod\)-annual-report.pdf](https://nationalgovernment.co.za/department_annual/408/2022-department-of-defence-(dod)-annual-report.pdf)> [Accessed on 2 March 2025]; DoD, 'Annual Report for the FY2022/2023', 9.
- 36 DoD, 'Strategic Plan 2020–2025', 2020, 4, 6. <<https://www.parliament.gov.za/storage/app/media/Docs/tpap/5a2878b3-e7a0-4568-87d8-776234e41173.pdf>> [Accessed on 2 March 2025].
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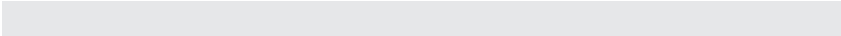
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- 149 “Full” accountability means the ability to extract answerability from the DoD and impose sanctions on the DoD where its actions are deemed improper. Further, “accountability” within the defence context requires a different approach considering national security limitations and the secrecy of information. “Full” accountability goes beyond ordinary accountability (answerability and sanction). It specifically means that no DoD conduct is beyond reproach or excluded from oversight mechanisms. Accountability may be important, but it is “full” accountability that must flow from military oversight’. See Heydenrych, ‘Re-evaluating Oversight’, 27–28.
- 150 Heydenrych, ‘Re-evaluating Oversight’, 43–44.
- 151 Heydenrych, *An Analysis of Defence Procurement*, 351.
- 152 This will promote transparency and allow members of the public to have a reference point regarding the DoD’s stance on fraud and corruption.
- 153 This will indicate that top management support the policy’s implementation.
- 154 This will address the apparent tendency that has developed among senior military personnel to diverge from, *inter alia*, accepted DoD defence procurement procedures.
- 155 This must include defence procurement-related fraud and corruption.
- 156 Heydenrych, *An Analysis of Defence Procurement*, 351–352.
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The Inability of South Africa to Comprehend the Foreign Policy Apparatus and the Political Climate in the United States of America Correctly

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Abstract

This article reports on South African foreign policy in the context of the changing dynamics of Pres. Donald Trump’s second term of office. It contends that South Africa has faced difficulties in adjusting to these developments and new foreign policy imperatives. The foreign policy of a country is profoundly influenced by its domestic realities. The Trump administration has implemented substantial changes in the foreign policy of the United States of America, marked by assertive negotiating strategies and an emphasis on economic, national interest and security priorities, which have compromised international partnerships. Trump’s “America First” strategy has led to a withdrawal from enduring global obligations, affecting ties with other countries, particularly South Africa. Relations between the two countries were further exacerbated by limited understanding by South Africa of the political context of the United States. The disparity between the South African foreign policy initiatives and the realities of United States internal politics has caused misinterpretations of United States intentions. In March 2025, the South African ambassador was declared *persona non grata* by the United States, and the imposition of tariffs on South Africa further strained relations between the two countries. Sanctions being legislated by Congress remain a distinct possibility and would carry inordinate consequences for South Africa. Although the relationship between South Africa and the United States is anticipated to develop, the present circumstances remain ambiguous. The current research highlights the crucial importance of informed participation and a thorough understanding of the prevailing political processes.

Keywords: Executive Orders, *Persona Non Grata*, Ramaphosa, Sanctions, South Africa, Tariffs, Trump, United States of America

Introduction

Over the years, the South African (SA) government has failed several times to understand and interpret policy decisions and events in the United States in their proper context and level of importance. It has also failed to grasp how the foreign policy imperatives of the Trump administration are fundamentally altering geopolitical balances.

President Donald Trump signed the Executive Order (EO) “Addressing Egregious Actions of the Republic of South Africa” on 7 February 2025.¹ Other orders and actions followed, which affect South Africa. The interrelations between international and national environments are crucial in shaping foreign policy decisions. The reciprocal relationship between foreign affairs and domestic imperatives is a reality. A foreign policy would be

almost non-existent without domestic influences. Comprehending Trump's foreign policy requires an understanding of the domestic political landscape in the United States and the influences that shape it. The indiscretions of the SA ambassador resulted in the United States declaring him *persona non grata*. President Ramaphosa's appointment of Mcebisi Jonas as Special Envoy to the United States, his meeting with Pres. Trump in Washington in May 2025, and the imposition of tariffs on South Africa have a direct bearing on the precarious relationship of South Africa with the United States, which shows no sign of improvement. As this is an ongoing development, only events up to 8 August 2025 are discussed here.

The primary objective of the current study was to elucidate the characteristics and challenges of the current United States (US) policy towards South Africa, and the SA responses to it. The research underscored the profound misunderstanding by South Africa of trends in the United States, and the unpreparedness of South Africa to confront the realities of the contemporary US political scene. The expulsion of the SA ambassador, the ill-fated appointment by Ramaphosa of a special envoy to the United States, and the meeting between Trump and Ramaphosa required special attention. The study contextualised all these events and developments concerning Trump's conduct of applying tariffs on South Africa, and possibly legislative responses by way of sanctions, offering critical tools for comprehending the intricacies of US-SA relations.

Key causes contributing to the strained relationship between the two nations were identified and are stated, enabling a comprehensive evaluation of their consequences. The analysis revealed that both the SA government and the African National Congress (ANC) were often unaware of critical events that affected SA diplomatic relations with the United States, resulting in economic consequences and sanctions against South Africa. The dynamic nature of this relationship necessitated a flexible strategy to adapt to changes in the stances and responses of both nations.

Methodology

The current research employed a qualitative methodology to investigate the inability of South Africa to comprehend the foreign policy apparatus and the political climate in the United States correctly, while also misunderstanding the foreign policy dynamics and political landscape of the United States. The qualitative technique was selected for its efficacy in analysing intricate political relationships and the viewpoints of prominent political personalities, including heads of state. Data were collected through an extensive examination of government records, newspaper articles, and political journals that chronicled the declining ties between South Africa and the United States since the start of Trump's second term of office in January 2025.

The research encompassed documentary analysis and archival investigation to reveal elements of the US political system that may be misinterpreted or neglected by the SA government and the ANC. This involved analysing legislative procedures, the enforcement of sanctions, and the impact of Trump's "Make America Great Again" (MAGA) platform on global relations. The study examined the effect of and the way in which SA foreign policy positions, specifically SA relationships with Russia, Iran, and Hamas, along with the critical SA view of Israel, are at odds with US national interests and security.

A thorough literature analysis constituted the foundation of the study, including recent research findings and media reporting from both countries. This review was essential for creating a rigorous process that was theoretically sound and capable of producing genuine findings. It emphasised the significance of comprehensive literature reviews in finding well-examined effects and structuring data for coherent analysis.

Primary sources were utilised to convey the perspectives of leadership from both countries, with official material providing historical context and contemporary pronouncements. This method enabled a concentrated examination of pertinent problems while recognising the necessity for continuous monitoring of political events. The study emphasised the need for political analysts to perform comprehensive and unbiased assessments of these intricate subjects.

The organised, multifaceted methodology employed enabled a thorough identification and analysis of the ramifications of US–SA ties. The literature identified significant authorities involved in this developing political discourse, suggesting that the subject will remain relevant for forthcoming discussions. The research acknowledged the ambiguities surrounding the future of US–SA relations, and their potential influence on the lives of individuals and companies in South Africa, as well as on SA foreign relations. Speculation about future changes is avoided, as it may not yield any beneficial insights at present. The results, however, emphasised the necessity of ongoing surveillance and study of the ever-changing political situation to enhance comprehension of the outcome for both countries.

President Donald Trump’s Foreign Policy Shake-Up

The EOs signed by Trump during the first month of his second term of office mark a turning point in US foreign policy, signalling a retreat from longstanding international commitments and alliances. This shake-up warrants particular attention, with European leaders scrambling to adjust to the changing geopolitical landscape while South Africa is notably unprepared. These developments cover four themes worthy of consideration:

US Foreign Policy Realignment

The above-mentioned EOs mandate a sweeping review of US involvement in multilateral organisations and treaties, reinforcing Trump’s transactional “America First” approach.² On 20 January 2025, Trump issued an EO suspending foreign aid for a 90-day evaluation process to ensure conformity with US interests and values.³ This extensive freeze affected several aid programmes for health initiatives and treatment in several African nations, including South Africa. On foreign aid, the United States is convinced that it has been duped by the global assistance programme for an extended period. The cancellation of the United States Agency for International Development (USAID) programmes was not only an example of the Trump administration targeting progressive expenditures or attempting to alter the financial outcomes of the federal government. It was also of paramount importance to a broader transformation in foreign policy direction. The whole framework through which the United States has historically used soft power is being dismantled, reoriented, and altered. This implies alterations in the approach of the United States to assistance and development initiatives, US promotion of global democracy, and its interactions with other governments.

Western aid cuts are reshaping the geopolitical landscape.⁴ Former stalwarts of overseas development, such as the United Kingdom, have decided that aid at previous levels is no longer politically or economically tenable.⁵ As Western countries reduce their aid budgets, China, Turkey and the Gulf States are increasing their competition for soft power and commercial advantage, also in Africa. The cancellation of almost all US aid, together with cuts in assistance by other advanced Western economies, will have immediate socioeconomic effects, and may also drive radical political change in several developing economies as governments struggle to replace these funds and expertise.

Uncertainty for Europe

The US foreign policy shift has rattled European leaders, particularly in Germany, as they face a reduced US security presence and a push for more self-reliance.⁶ European leaders are rapidly grasping the extent to which their world has undergone significant changes. On 4 February 2025, Trump signed a sweeping EO with the potential to upend decades of US global engagement. The directive mandates a comprehensive review within 180 days of all current multilateral organisations of which the United States is a member, and all international treaties to which it is a party.⁷

Soon afterwards, Europeans became rudely aware of even more shocking news:

Trump's overtures to Putin and his administration's sharp rebukes of Europe have sent shockwaves through the continent. Can the transatlantic alliance be salvaged – and can Europeans take charge of their security as the United States pulls back?⁸

After winning the German election on 23 February 2025, the conservative leader, Frederick Merz, became chancellor in May 2025. He concluded that Europe must become independent from the United States and –

[M]ust navigate a new era without Washington as a close ally. But just as Merz is on the cusp of taking power in Germany, his cherished America has turned from indispensable friend to frenemy. [...] German leaders, including Merz, have been especially slow to accept the new reality.⁹

Politicians in Europe quickly grasped the profound influence of the new US approach to foreign relations and their interaction with the world. The future of European security hinges on the efficacy of its responses to these new challenges. It has become imperative for Europeans to evaluate the latest situation more strategically. Leaders, such as Emmanuel Macron of France and Sir Keir Starmer of the United Kingdom have made special efforts to manage their relations with Trump. They realised that the economic might of the United States is too substantial to evade, isolate or disregard. The concessions granted to Trump by North Atlantic Treaty Organization (NATO) countries over military budget objectives, akin to trade concessions by the European Union, demonstrate an acknowledge this fact.¹⁰ These were significant lessons for SA leadership.

The African Position

Since the beginning of his second term of office, Trump has exhibited a growing penchant for global disengagement. One observer believes it ‘might be too ambitious to hope for a full-fledged US strategy toward Africa’.¹¹ The impact of Trump’s actions reverberated throughout Africa, leaving many leaders astonished, and prompting a period of introspection. Within this context, Shimbali highlights African external dependence.

The aid cut exposes a tentative failure of African leadership. With excellent visibility, it lays bare the fact that Africans are dependent on America and the external community. There are lessons to learn, and highlighting these should be a priority for all Africans in envisioning opportunities for change. [...] It is undisputable that Africa is dependent on the international community. The act of constantly waiting for another country to provide medications and funds for free and for you to employ people with constantly donated funds, signals enormous evidence of dependence. This shows another level of Africa being akin to a street beggar.¹²

Vulnerability of South Africa

The United States is re-evaluating its relationship with South Africa from two perspectives. First, there are concerns over SA foreign policy alignments with China, Russia, and Iran, and its unrelenting negative attitude and actions towards Israel and the Republic of China (Taiwan). The United States is concerned by SA growing alliances with certain states, which are perceived as potentially compromising US national security objectives. Second, and equally important, is Trump’s indication – in no uncertain terms on several occasions – that he disapproves intensely of certain aspects of SA domestic policies and particular incidents in South Africa.

It is essential to realise that Trump is inherently a businessman and, hence, a transactional individual who comparably approaches foreign policy matters. That is why the United States has entered a transformational period in its foreign policy. This trajectory of change is already evident in the new US relationship with the Gulf States, which Trump visited in May 2025. In an interview with *Mauldin Economics*, George Friedman, author and strategist of *Geopolitical Futures*, explains, ‘We can make peace with those willing to work with us.’¹³

Trump drives a hard bargain, applying the same principles and agenda to his foreign policy to effect radical changes. He thrives on keeping his adversaries off-balance and, while hitting hard, he does not give them any chances to adjust or recover, which allows him to maintain dominance in the relationship.¹⁴ From alienating allies to praising adversaries, Trump intends to abandon decades of US foreign policy.¹⁵ The interests of other countries are secondary to that policy. Relationships are based on benefits to the United States and not on a continuation of the status quo. United States foreign policy and engagements therefore relate to the strategic security and economic interests of America. Trump’s protectionist, insular outlook poses a challenge to many countries. He has demonstrated this unequivocally to every country in the world through his policy on tariffs.

Policy on Tariffs

The tariffs Trump announced on 2 April 2025 signify a substantial shift in US trade policy under his administration, and raised concerns over a potential global trade war with unpredictable economic consequences. The announcement represents the completion of Trump's "America First Trade Policy", an EO he signed on his inaugural day in office.

Tariffs are a crucial component of Trump's worldwide strategy to bolster the United States domestically. The Federal Reserve cautioned that Trump's tariffs might exert enduring influences on inflation. Trump was not at all pleased to hear this remark. He is persistently implementing his tariff policy despite several alterations and recurrent delays. His reiterated threats to initiate measures against both significant and minor trading partners show his steadfast will to penalise nations generally for various trade practices and policies he perceives as unjust and harmful to the United States. At the same time, trading partners of the United States have predominantly not resisted Trump's massive tariffs.

With Trump's threats to redouble tariffs on states that defy him, it meant that for most countries, the decision to "chicken out" was not cowardice, but economic common sense.¹⁶

For the European Union, there was a genuine concern that a more confrontational stance towards Washington could spill over into other areas. European dependency on the US security guarantee was a further argument against trade confrontation. In the end, Europe found it lacked the power to pull the United States into a trade pact on its terms and so signed up to a deal it can just about tolerate – albeit one that is skewed in the US favour. But, as one EU ambassador remarked:

Trump worked out exactly where our pain threshold is. Let's look at the past months as a wake-up call. Europe must now prepare itself strategically for the future.¹⁷

In the same article, Bounds, Foy and Hall highlight another lesson for South Africa with reference to urgency and persistence.

Maroš Šefčovič, the EU's avuncular trade commissioner, was dispatched to Washington seven times to propose areas of agreement, deliver homilies on the importance of the transatlantic relationship. In total, Šefčovič held more than 100 hours of frustrating talks with his US counterparts.¹⁸

In recent months, a Japanese negotiator visited Washington almost every other week for meetings with top US officials. But it was only after he had secured a 70-minute meeting with Trump in the Oval Office that the critical US ally was able to strike a deal.¹⁹

It remains a question whether South Africa would be able to learn from others. While other governments have sent ministers and officials to spend days and weeks finalising mutually acceptable tariff structures, South Africa has opted to proceed mainly through long-distance communication, awaiting a template on US requirements, which has resulted in missing important deadlines.²⁰ South African officials were unable to engage adequately with their counterparts and other officials in Washington. 'That is symptomatic of the political *froidueur* between the two countries.'²¹

In the end, the way South Africa handled its engagement with the United States on tariffs caused friction between political parties in the SA Government of National Unity (GNU). The political backlash widened when the Democratic Alliance blamed leaders from the ANC for botching the tariff negotiations.²² Again, Ramaphosa played the blame game, to which he has reverted so often in the past. With it, he only impresses those who want to be impressed. Lately, Minister of International Relations and Cooperation, Ronald Lamola, has also started to blame others for the precarious situation in which South Africa is finding itself in its relations with the United States.²³ When Trump's EO of 31 July 2025 is read, it is clear that South Africa falls in one or more of the groups of countries he referred to very forcefully.

Other trading partners, despite having engaged in negotiations, have offered terms that, in my judgment, do not sufficiently address imbalances in our trading relationship or have failed to align sufficiently with the United States on economic and national-security matters. There are also some trading partners that have failed to engage in negotiations with the United States or to take adequate steps to align sufficiently with the United States on economic and national security matters.²⁴

Understandably, the United States has been in no hurry to address the absence of South Africa when it had to deal face to face with consequential countries, such as Japan, Indonesia, and South Korea, which resulted in essential concessions and applicable tariffs.

As Ravi Pillay has correctly pointed out, the tariffs are just the tip of the spear; what follows is a contest for relevance, resilience and strategic foresight. Pillay continues:

President Ramaphosa says talks with the US are ongoing and he remains optimistic. But optimism is not a strategy. We must be brutally honest: this is more than a trade dispute. The proposed US sanctions bill not only threatens Ageo, it calls for a sweeping review of the entire US–South Africa relationship and scrutiny of ANC leaders. This is the sharp end of what happens when foreign policy is not aligned with economic interests. [...] At present, there is too little integration between our political alignments and economic objectives. [...] But this one demands more than moral appeals or bureaucratic reshuffling. It demands clarity, urgency and unity of purpose. It demands that we treat trade diplomacy as a frontline of national survival.²⁵

These tariffs are bound to intensify the already fragile SA financial and fiscal concerns. Pretoria must be prepared for the long-term economic damage as the United States weaponises trade for political pressure. Negotiations have been complicated by political demands from Trump, which – although not formally part of trade talks – are driving the hard-line stance taken by Washington. The Trump administration listed a series of conditions as part of the bilateral trade agreement negotiations.²⁶

In applying tariffs, Trump is also having an influence on foreign policy on a broader scale. It will serve South Africa well to note the three cases discussed below, involve two of its BRICS²⁷ partners as well. Within a month of taking office, Trump issued a series of strong warnings to both the BRICS bloc collectively, and to its individual member states individually. These warnings focused primarily on the efforts by the BRICS group to reduce reliance on the US dollar and the growing discussion around creating a new BRICS-backed currency.²⁸ That action may still come, but what Trump has imposed on India and Brazil relates to other issues he has with those countries. Until recently, Washington had seen Delhi as a pivotal strategic partner. The US annoyance with India largely centres on the latter buying Russian oil – the most significant supply source of oil to India. As Trump pursues his goals on Russia and trade, the relationship of the United States with India, an increasingly important partner in Asia, is at stake. On 6 August 2025, Trump announced that he would double tariffs on India to 50 per cent as punishment for India continuing to purchase Russian oil.²⁹ Trump coupled the new, punishing tariff level with a threat to impose similar penalties on other countries that buy Russian energy as he sought to use trade policies to pressure the Kremlin into resolving the war in Ukraine.³⁰ Trump also imposed a series of harsh measures against Brazil, including the implementation of a 50 per cent tariff on Brazilian exports to the United States. This is one of the highest tariffs the United States has levied globally in recent years. The stated motivation was not economic, but political.³¹ Trump explicitly linked the tariffs to Brazil prosecuting former Pres. Jair Bolsonaro, a close ally of his who was standing trial. In addition to the tariffs, the United States enacted sanctions against Brazilian Supreme Court Justice Alexandre de Moraes, who presided over the trial. The sanctions imposed on Moraes allow the United States to block property and freeze assets of foreign individuals implicated in corruption or human rights abuses. Moraes's US-based assets were frozen, and visa restrictions were imposed.

The president of Switzerland, Karin Maria Keller-Sutter, visited Washington on 5 August 2025, to persuade the United States to reduce the 39 per cent tariff imposed on her country. Following several encounters, including one with Marco Rubio, Trump's Secretary of State, she returned home without any results.³²

Trump has consistently sought to reform global trade, which he perceives as having deprived America of employment and wealth. With his implementation of the tariff policy, he executes that strategy. His imposition of double-digit tariffs on roughly 100 nations signifies a significant shift from the commercial framework that the United States has contributed to establishing internationally since World War II. Trump's modifications will elevate US tariff rates to levels unprecedented in a century. With these actions, he fulfilled a campaign commitment to use stringent tariffs to recalibrate global trade, to benefit the United States and thereby help to "Make America Great Again".

Over the past several months, Mr. Trump has, except China, been proven right that the U.S. economy is a powerful weapon to wield with its largest trading partners. Europe and Japan ultimately accepted less favorable terms to preserve access to the United States and avoid a painful trade war.³³

Now Trump is spearheading a dramatic reconfiguration of the international trade landscape.

Executive Order of 7 February 2025

The essence of the EO issued by Trump on 7 February 2025 is multifaceted.³⁴ It suspends aid to South Africa, promotes Afrikaner refugee resettlement in the United States, and responds to aspects of SA foreign policy and humanitarian considerations. This EO reflects the US stance against perceived discriminatory practices in South Africa and its broader foreign policy objectives of national interest and security. A specific effect of this EO is the withdrawal of the United States from the Just Energy Transition Partnership (JETP), to which it had initially pledged more than \$1,5 billion in grant and commercial funding.³⁵ In a post on his X account (formerly known as Twitter) on 7 March 2025, Trump reiterated that the United States was ‘stopping all Federal Funding to SA’.³⁶ Ramaphosa’s response to this news highlighted Ramaphosa’s continued disconnection from the underlying motivations behind Trump’s actions. Further, it revealed Ramaphosa’s misconceptions about the factors driving Trump’s foreign policy adjustments. ‘South Africa remained committed to building a mutually beneficial trade, political, and diplomatic relationship with the Trump administration.’³⁷

To many South Africans, it appears however that the government is not treating its conflict with Washington with the urgency it demands. This fear became real when Trump imposed a tariff of 30 per cent on South Africa on 1 August 2025, effective a week later.

Ramaphosa is prone to procrastination.³⁸ He shows no inclination to prevent his presidency from unravelling even more.³⁹ The heart of the SA problem and dilemma is encapsulated in these remarks by William Gumede:

ANC leaders have insisted that foreign policy is the sole prerogative of the ANC. However, ANC officials are not able to read the Trump administration, and have used inappropriate negotiation strategies that have inflamed Trump and Republican leaders. [...] The ANC needs to take responsibility for its overwhelming role in the destruction of South Africa’s relations with the US. [...] unwisely-led country from being devastated by US sanctions, which stem mainly from years of ANC ideological and partisan anti-US policies. They also stem from the party’s continuing insistence on blame-shifting, rather than taking responsibility and becoming more pragmatic.⁴⁰

The outcome of the telephone discussion between Ramaphosa and Trump on 7 August 2025 remains uncertain. They committed to moving forward with more contacts, acknowledging the different trade negotiations in which the United States is now engaged, and recognising that the relevant trade negotiating teams will advance extensive conversations. Minister Ntshavheni, who serves in Ramaphosa’s office, made this unambiguous statement at a news conference on the same day the two leaders had their telephone conversation, ‘We need to be very clear that the transformation agenda of the country [i.e. South Africa] is non-negotiable.’⁴¹

A few days earlier, after a meeting of the ANC National Executive Committee, which is the highest decision-making body of the party between party conferences, the ANC Secretary-General, Fikile Mbalula, declared defiantly that South Africa will not be coerced into reversing its progressive economic transformation agenda or compromising its

sovereignty under the guise of opportunistic foreign trade.⁴² Lamola is on record saying that South Africa will not modify its policy to accommodate Washington, as this is a sovereign matter on which South Africa needs to continue to be firm, and to which the country should adhere. Mbalula also added a brazen comment about sanctions, implying that they do not scare South Africa.⁴³

South African Miscalculations

South Africa is not exempt from any policy review or new policy applications that the United States wants to implement in the interests of the United States. South Africa must realise that it is a minor, even insignificant, player in Trump's game plan. In evaluating the options available to the United States to act against South Africa, the influential Hudson Institute, which has close ties with the White House, has advanced these arguments.

Washington should confront any government that opposes US interests so aggressively. [...] A successful campaign would need to target South African officials responsible for the anti-American measures the government has implemented. [...] The US has a suite of relevant tools, including visa bans and sanctions, and South Africa is a target-rich environment. The ANC is one of Africa's most corrupt organisations. [...] The terrorist financing that flows from and through South Africa could also serve as the basis for sanctions. [...] But if the US does not meaningfully confront the ANC, the party will continue its decadeslong campaign against the West on behalf of the so-called progressive international revolutionary movement. [...] to target key anti-American officials in South Africa to marginalize them and warn others of what will come if they do not change course.⁴⁴

Trump's approach to foreign affairs makes sense when one considers how he has transformed the domestic scene and politics in the United States. For this reason alone, he regards South Africa as having no real consequence. To expect any favours from him or to believe that he will come to the rescue of the country in any way is to dwell in a fool's paradise. What makes the SA case worse is that its government seems to struggle even more to understand or adjust to the seismic changes brought about by Trump's "America First" foreign policy in his second term of office. Trump's distorted view of the Expropriation without Compensation (EWC) Act (No. 13 of 2024) is not the primary reason for his recent harsh words and criticism of South Africa.⁴⁵ His views on South Africa relate to how he perceives SA foreign policy and the way some aspects conflict with and undermine US national interest and security, how SA policies are hostile to decades-long close friends and security allies, and how ties with Iran are strengthened. The relationship between South Africa and Iran has garnered attention due to accusations of military technology transfer, possible nuclear collaboration, and Iran allegedly funding the ANC for driving the case against Israel at the International Court of Justice (ICJ). The Biden administration had overlooked the escalating relationship between Iran and the purported transfer of military technology from South Africa to the Islamic Republic; however, the Trump administration has now seized this issue, and the repercussions for South Africa may be significant.⁴⁶ The relationship between South Africa and Iran may transform regional dynamics in Africa, affect global diplomatic relations, and alter economic and military strategies. Nonetheless, these consequences include the dangers of heightened tensions and possible US penalties.

Several authoritative articles have been published in South Africa and the United States lately, exploring the fundamental differences in these countries in depth.⁴⁷ At its core, this boils down to strategic assessments and geopolitical realities. Friedman remarks on these current realities:

Politicians become presidents because they understand reality. [...] They know the American people at this moment in time. [...] So we have a long history of how very efficient foreign policy leaders, which Roosevelt was, also handled domestic politics in the same way: unprincipled and self-righteous. [...] Trump is trying to prove something in the Western hemisphere. The old rules don't work and won't be followed, so he is a rule breaker. He breaks the norm. He's creating realities.⁴⁸

The imperatives of understanding the inner workings of the US political system and the way foreign policy matters are addressed by Pres. Trump and the two Chambers of Congress have proved to be severely lacking in the SA government in recent times. South African actions reflect the strategic vacuum in which the country conceives and executes its foreign policy. As Trump increasingly voices his displeasure with SA actions and policies, Ramaphosa's continued response declares that South Africa remains committed to building a mutually beneficial trade and political and diplomatic relationship with the Trump administration, assuming business as usual.

The reasons for this inept and ineffective handling of SA foreign relations are manifold, and do not need any discussion in this article. Instead of trying to understand what drives US foreign policy currently, South Africa persistently misreads developments and policies that aim to protect and enhance US interests. Francois Baird drives this point forcefully home in his article:

South Africa is reading the American picture completely wrong. South Africa has no communication problem with the American government; it is a relationship problem in a new order. There is a new order in America and the world. America is in the midst of a revolution during a geopolitical realignment. [...] The appetite to become more like Europe is fading. [...] The geopolitical outlook has also changed. [...] The focus of American policy on, among other things, tariffs, the budget, and diplomacy is being shifted to the new security agenda. [...] Diplomacy is now in support of friends such as Argentina and against foes, of whom the members of the BRICS grouping, for example, can all be seen as enablers of Chinese domination at close range. [...] The Ramaphosa government has clearly, and finally, convinced the Trump administration that South Africa has fallen into the Chinese-Russian-Iranian grip. [...] The core principle of all crisis management is to visualise the worst outcome, plan how to avoid it, and work hard to achieve the best result.⁴⁹

As Baird concludes, dark days are ahead if South Africa does not strategically review its policy and adopt a less confrontational stance toward the United States, addressing the issues that concern the United States and considered harmful and threatening to US national interests and security. Developments since the EO was issued on 7 February 2025 have not advanced SA relations with the United States; on the contrary, they instead

ensured that South Africa stays on the radar of the United States for whatever reason. Suffice it to concentrate on the main disastrous issues.

Indiscretions of Ebrahim Rasool

Rasool did not become a controversial figure overnight; he had already established himself as one before assuming his ambassadorial duties. The open display of his association with Palestine, Gaza, Hamas and Iran was known in Washington, DC, before his arrival. Addressing his mosque in Athlone, a suburb of Cape Town, Rasool explained, 'I believe that I will go to Washington as a representative of a moral superpower in a world that has lost its moral anchors.'⁵⁰

Rasool described the Hamas founder as 'one of the greatest inspirations' and has shown a consistent willingness to embrace terrorists and radicals for decades.⁵¹ Richard Johnson and Sam Westrop list many other associations with which Rasool is linked, and which raised eyebrows.⁵²

In March 2025, Rasool used his diplomatic status to denounce the United States and lambast Trump. No ambassador has a licence to speak in the way he did. He, like all other diplomatic officers, is not above the diplomatic legal principles enshrined in the Vienna Convention on Diplomatic Relations, adopted on 18 April 1961, which have been codified in international law. Foremost, the clear injunction embodied in article 41, paragraph 1 of the Convention, contains this cardinal rule of diplomacy in unequivocal terms:

Without prejudice to their privileges and immunities, it is the duty of all persons enjoying such privileges and immunities to respect the laws and regulations of the receiving state. They also have a duty not to interfere in the internal affairs of that state.⁵³

This paragraph is explicit and free from ambiguity or interpretive difficulty. Although diplomats possess privileges and immunities, they are concurrently obligated by these privileges and immunities to fulfil their duties in accordance with the Convention. Any intervention in the domestic affairs of the host nation is prohibited. Arguably, a diplomat should also, under all circumstances, maintain cordial relations with the host nation to fulfil the mandate of the diplomatic assignment. In instances where diplomats exceed these limits, the host nation has the authority to designate them *persona non grata*, necessitating the sending nation (in this case, South Africa) to withdraw the individual. This procedure ensures that diplomatic immunity is not abused and that the sovereignty of the host nation (in this case, the United States) is maintained.

The goal of the *persona non grata* concept is to ensure justice for both the sending state (the state whose diplomat is being removed) and the receiving state (the state attempting to remove the ambassador). This ensures that both concepts uphold the equality and dignity of sovereign nations.⁵⁴

Rasool had to leave his post on 17 March 2025. The Senate Foreign Relations Committee Chairman, James Risch, remarked, 'I applaud @secrubio for calling out the South African ambassador's disgraceful, anti-American hate speech. Suffice it to say that he is not cut out for diplomacy.'⁵⁵

In South Africa, supporters of the ANC considered Rasool's expulsion undiplomatic and humiliating, because it was aimed at making an example of South Africa. It wanted to send a message to the rest of the developing world that there are consequences for challenging US interests and international and political agenda. From the ranks of the ANC, the response was audacious.

For this, the US has declared him persona non grata, proving once again their double standards on free speech and democracy. But we will not be bullied. [...] South Africa will stand by its diplomats. We will defend our sovereignty. And we will not be silenced by an empire that preaches democracy but punishes truth-telling. South Africa is not a vassal state. We do not take orders from Washington. We will not be intimidated into silence. Ambassador Rasool's expulsion is proof that our stance on global justice is practical – when you are punished for speaking the truth, it means your words carry power.⁵⁶

Addressing the crowd, welcoming him back to South Africa, Rasool, in his arrogant self-assurance, insolently spoke of wearing US action as a 'badge of dignity' and stated that he had 'no regrets'.⁵⁷ This meant he stood by his remarks for which he had been expelled.

While not mentioning any country or organisation by name, Ramaphosa's coded wording left nobody in March 2025 in any doubt about what he had in mind and wanted to convey beyond the borders of South Africa.

As South Africa we stand in solidarity with all those whose right to lead lives of dignity are being undermined by conflict and war. [...] As a country we will continue to repeat our call for a renewed global human rights movement so that the rights and dignity of all people should be upheld.⁵⁸

His remarks followed those of Rasool, who, upon his return to South Africa, again spoke brashly, 'We cannot negotiate away our case against genocide at the ICJ.'⁵⁹

The departure of Rasool was not the last SA official who was ordered to leave the United States. The SA Military Attaché in Washington and its Consul-General in Los Angeles were also ordered to leave the United States. In July 2025, the United States cancelled the "Exercise Shared Accord" with the SA military. The cancellation marks a significant shift in US-SA military cooperation.⁶⁰ At the beginning of August 2025, the Russian naval training ship, Smolnyy, docked in Cape Town harbour for several days after the Department of International Relations and Cooperation (DIRCO) had granted permission for the visit.⁶¹ The third iteration of the tri-nation naval exercise Mosi, between Russia, China and South Africa, was set down for Western Cape waters in November 2025.⁶² These developments reflect the current political climate and the perceived tilt by SA foreign policy away from the United States, possibly jeopardising all future defence collaboration.

For some time already, international obsequiousness (submissiveness) has been wearing thin – even Pres. Joe Biden's administration became impatient with the SA anti-Western posturing – but it took Trump to draw the curtain finally. Trump's freezing of aid to South Africa, with the possibility of sanctions, has a simple moral: actions have consequences. The nostalgic foreign policy of the ANC, rooted in several alliances with Iran, Venezuela

and Cuba, has significantly strained SA relations with the United States. This ideological alignment has led to tangible repercussions.⁶³

The legacy of Nelson Mandela is finally depleted. The 'Madiba magic' that opened international doors and wallets and silenced criticism is no more. The halo of righteousness under which the ANC swaggered on the world stage since 1994 lies shattered.⁶⁴

The only constant permanency in SA foreign policy is the unrelenting support to Cuba, Western Sahara (Polisario), Palestine (Hamas) and Iran. At the Liberation Movement Summit, which was held in Johannesburg on 27 July 2025, Ramaphosa warned that the African continent was once again under threat. This time, he criticised transactional diplomacy, whereupon he reiterated unwavering SA support for the struggles of Palestine, Western Sahara and Cuba.⁶⁵

Nonetheless, there has been little indication of alterations in foreign policy, amendments to problematic laws, or a departure from the pervasive race-based criteria in South Africa. The newly formed GNU is hamstrung in foreign affairs in that the ANC grip on DIRCO prevents any foreign policy reform, and the ANC stubbornly controls all SA foreign policy. The party ensures that mostly party cadres with little business acumen are appointed as ambassadors. In contrast, SA competitors appoint commercially adroit and highly experienced individuals with proper skills to prioritise investment for their companies in their countries above political ideology.⁶⁶

Appointment of Mcebisi Jonas

Ramaphosa's response to the vacancy of the ambassadorial post in Washington was to appoint Jonas as Special Envoy to the United States.⁶⁷ A day after his appointment, Jonas suffered the ignominy of being discredited on several fronts from which he has not recovered to this day. First to surface were his harsh criticisms of Trump, which he had made in a public speech several years ago.⁶⁸ It was not his criticism of Trump that scuttled him. Many others have criticised Trump in equal or even harsher and more derogatory language.⁶⁹ It is his chairmanship of MTN, an emerging market mobile operator headquartered in South Africa, which has clouded his effectiveness. Jonas could not distance himself from that role. Incisive and penetrating questions about the role of MTN in Iran and the relationship with that government remain. The facts about MTN and Iran are public knowledge.⁷⁰ A recent court case in New York has highlighted that relationship.⁷¹ The United States regards Iran as a danger and a threat to its national interests and security. It remains an open question whether the SA government identified and quantified these facts in its due diligence before appointing Jonas. The upshot of this blunder and foreign policy miscalculation has been that Jonas did not accompany Ramaphosa on his visit to Washington. Furthermore, Ramaphosa has subsequently confirmed, on several occasions, that Jonas was actively involved in discussions and finalising positions relating to SA relations with the United States, including tariffs. The presidency was most indignant in its reaction to reports that the United States had not issued a visa to Jonas that would have allowed him to meet officials in Washington. The status of Jonas's assignment remains an unanswered question. In reply to a parliamentary question, Lamola provided

the following answer, ‘The special envoy has yet to travel to the US on official business. However, it must be noted that the sensitive and confidential work of special envoys is never published.’⁷²

This confirmation from Lamola underlines the strained and questionable approach by South Africa to and dealing with the United States. From Lamola’s remarks it was clear that at least one of Jonas’s tasks as special envoy for engaging with the United States would not be happening.⁷³

Ramaphosa’s Visit to the White House

Even before Ramaphosa’s visit to the White House in May 2025, Julius Malema, the leader of the Economic Freedom Fighters (EFF), exacerbated the SA position in Washington by performing his contentious signature song and dance, ‘Kill the Boer, Kill the Farmer’, on the tenth anniversary of his party on 21 March 2025. Both Trump and Rubio took note of it. The latter, who further deemed Rasool undesirable in the United States, remarked that it is ‘a chant that incites violence’.⁷⁴ Ramaphosa must have been aware that the conduct of one of his political adversaries was already known to a sceptical audience in the United States. When Trump therefore played a video showing Malema’s audacious performance of the song on several occasions, Ramaphosa’s body language revealed how uncomfortable he appeared. He had no coherent answer to Trump’s question of why action had not already been taken against Malema. Ramaphosa could not have been surprised to learn subsequently that the United States was demanding action against Malema as one of the preconditions for improving relations. Space does not allow for a further evaluation of the meeting, which Ramaphosa continued to describe as “successful”, only to be contradicted by several sources who were aware of the US assessment of that visit. Gerrit Olivier made these remarks about the visit.

Contrary to the “hallelujahs” from some local media, the recent White House meeting between the two presidents was a damp squib. It did not “reset” relations. Trump was unimpressed; diplomatic relations were not restored, and nothing was said about the punitive measures that had been imposed.⁷⁵

Olivier’s overall conclusion is that ‘not since the dark days of apartheid has the country been humiliated more than it is nowadays’.⁷⁶

South African Action against Israel

The United States deems SA actions against Israel and the close relationship South Africa has with Iran as contrary to US national interest and threatening US national security. After the institution of legal proceedings against Israel at the ICJ, South Africa also supported action by the International Criminal Court (ICC) against the leaders of Israel. Thereafter, South Africa played a central and founding role in the Hague Group.⁷⁷ This Group leads and coordinates multilateral efforts among these states, of which Cuba is a member, to enforce rulings of the two courts already mentioned. The Hague Group regards its involvement as a moral and legal necessity thereby cementing its international profile as a champion of multilateral legal action and accountability in the Israeli–Gaza conflict. Ramaphosa co-authored an ill-considered, ill-advised, and especially ill-timed

article with the leaders of Malaysia and Colombia, as well as the director of the Hague Group. In the article, the authors were highly critical of Israel and the United States. The Group's endorsement of Hamas, a US-designated terrorist group, came as no surprise.

On 29 September 2025, Trump and Israeli Prime Minister Benjamin Netanyahu announced a 20-point peace plan for Gaza, signifying a notable turnaround in US and Israeli approaches. The proposal includes the prompt release of hostages, the disarmament of Hamas, and the formation of a technocratic government. It further seeks a gradual Israeli departure and possible statehood for Palestinians, supported by several Muslim nations, including Turkey.⁷⁸

Trump's plan offers the best pathway out of the tragedy that has unfolded in Gaza. [...] For dragging the negotiations back to reality, Mr Trump and his team deserve praise.⁷⁹

Despite criticism and potential challenges, including the reaction by Hamas and the political environment in Israel, the peace initiative signifies a substantial possibility to alleviate the persistent bloodshed in Gaza, necessitating continuous pressure from international stakeholders for its effectiveness. This development carries substantial strategic and reputational implications for both South Africa and the Hague Group. The ongoing litigation and legal processes at the ICJ and ICC are at risk of being sidelined as the peace plan advances. The endeavours of South Africa and the Hague Group may become insignificant if legal impetus starts to lag behind political realities.

The new peace approach concurrently poses distinct challenges for South Africa. Its anti-Israeli stance is now aligning with a prospective breakthrough initiative, necessitating a careful refinement of legal strategies, advocacy, and diplomatic objectives within a more dynamic international context. South African diplomacy may face a significant obstacle if the country does not adopt a more pragmatic approach to international relations and geopolitics. South Africa must decide whether to engage pragmatically in the evolving peace process to maintain its influence, or to persist mainly in legal and political resistance, thereby risking diplomatic isolation. If the peace process is successful, the SA government may need to modify its rhetoric and approach, particularly as the new effort receives increased backing from the Muslim and Arab populations.

South African Chairmanship of the G20

United States Treasury Secretary, Scott Bessent, did not attend a G20 meeting of finance ministers and central bank governors held in South Africa in July 2025, which is currently the G20 president. The annual G20 meeting of heads of government takes place in Johannesburg in November 2025. Earlier, Rubio declared that the United States would not attend the summit.⁸⁰ Subsequently, the White House National Security Council banned US agencies from all work on the G20 in South Africa. While it does appear most unlikely that Trump will attend, Ramaphosa continues to assert that Trump will come. On 29 July 2025, Trump said that he would not attend the meeting. He cited deep dissatisfaction with SA domestic and foreign policies, specifically referencing concerns over violence in the country. During conversations with reporters, Trump suggested he might send someone

else to represent the United States, saying, ‘I’ve had a lot of problems with South Africa. They have some very bad policies.’⁸¹

In some circles in the United States there are growing calls to have South Africa expelled from the G20, citing the size of the SA gross domestic product (GDP) and the links the country has to terrorism.⁸²

Action by Congress

Legislative action is anticipated from both chambers of Congress. In light of the array of issues, Congress will reassess the bilateral relationship with South Africa. A bipartisan measure, the US–SA Bilateral Relations Review Act, was already introduced on 6 February 2024 in the House of Representatives during the Biden administration.⁸³ South Africa was viewed as subverting US foreign policy objectives, leading to escalating tensions between South Africa and the United States on several geopolitical matters. The SA conduct was considered to compromise US national security and foreign policy objectives. The legislative action foreshadowed a thorough examination of the bilateral relationship, addressing apprehensions of SA affiliations with China, Russia, Cuba and Iran, in addition to the SA position on Israel and Hamas. Also flagged was the SA involvement in joint military exercises with China, SA purported arms provision to Russia, and SA allegations against Israel in the ICJ as proof of activities that jeopardise US interests. For many US lawmakers, South Africa had gone too far and attacked a close ally and was undermining US security interests. There had to be consequences.⁸⁴

These activities represented a notable intensification in US–SA relations, with possible ramifications for commerce, foreign aid through USAID (US Agency for International Development) and diplomatic connections. On 3 April 2025, Congressman Ronny Jackson introduced a Bill, co-sponsored by Congressman John James, to authorise a comprehensive review of the bilateral relations between the United States and South Africa, identifying government officials of South Africa and leaders of the ANC who could face the imposition of sanctions. The Bill, with the title the “US–South Africa Bilateral Relations Review Act of 2025”, is resolute in declaring that SA foreign policy actions ‘undermine United States national security and foreign policy interests’.⁸⁵ An extensive range of issues, both domestic and foreign, are listed that are causing the United States much concern, and are to be investigated and reported to Congress as part of the stated review.

Within 120 days of enactment of this Bill, the US president, in collaboration with the Secretary of State and the Secretary of the Treasury, had to present a classified report to the relevant congressional committees containing a list of senior government officials of South Africa and ANC leaders identified by the US president as having participated in corruption or human rights violations. The report will provide a comprehensive explanation of the conduct that justifies the individual’s inclusion on the list, along with the anticipated timing for punishment. This Bill delineates eight principal issues concerning the ANC and South Africa.

According to Jackson, South Africa has brazenly abandoned its relationship with the United States to align with China, Russia,⁸⁶ Iran, and terrorist organisations, and this

betrayal demands serious consequences. For him, the SA government and the ANC have continued to undermine US national security interests consistently. He added, ‘This legislation ensures we conduct a comprehensive review of this supposed “ally” while also holding accountable any corrupt officials. The era of governments undermining American interests without repercussions ends now.’⁸⁷

Jackson explained that his Bill builds on and supports Pres. Trump’s EO of 7 February 2025. On 23 July 2025, this Bill was approved by the House Committee on Foreign Affairs with the committee voting 34 in favour and 16 against. The next step for approval is a debate and vote in the House, and if approved, the same procedure will be followed in the Senate. After approval in that chamber, it will require the signature of the president. Voting in the Committee has already shown support from some Democrats. This may also be the case for the following stages. The reaction of the ANC was that it was clear that the action would not be supported by the Democrats in Congress, who have, over the years, stood by the ANC. For some reason, the ANC seems completely oblivious of the fact that some Democrats on the Committee had already voted in favour and that the Democrats do not have a majority in either the House or the Senate in any case. Ramaphosa’s reaction was equally puzzling, as he did not know what was driving the proposed legislation to take action against members of the ANC. He was convinced that the Bill would not harm relations between South Africa and the United States.⁸⁸

On 17 June 2025, when Greg Steube, a Republican from Florida, introduced legislation for the House to consider suspending aid to South Africa for its pro-Hamas bias, he pointed out that it was clear that South Africa was unfairly targeting Israel and was friendly towards Hamas and Iran, thereby inciting hostility towards the United States and its allies. He detailed the various instances in which South Africa sided with Hamas and aligned with Iranian economic and military interests. Steube’s bill proposed imposing targeted sanctions on political leaders responsible for the antagonism by their government towards the United States and its allies.⁸⁹

Understanding US Sanctions

Several aspects of US sanctions of which South Africa and the ANC may not be aware are worth noting. Trump does not require legislative authority to impose sanctions on countries, companies, or individuals. He can authorise them in a matter of minutes. As president, Trump typically does not require explicit new legislative approval from Congress to impose most types of economic sanctions on countries, companies, or individuals. This sweeping authority is primarily granted by the International Emergency Economic Powers Act (IEEPA). This Act became law in 1977. It gives the president sweeping powers

[T]o impose economic sanctions on persons and entities upon determining that there exists an unusual and extraordinary threat, which has its source in whole or substantial part outside the United States, to the national security, foreign policy, or economy of the United States.⁹⁰

Additional innovations in sanctions policy may arise as the Trump administration investigates the extent and boundaries of penalties to advance its geostrategic or domestic policy goals.⁹¹ The US president possesses extensive authority to decide when sanctions are enacted, the particular targets, and the methods of their implementation or removal. Executive Orders are a conventional instrument. Furthermore, Pres. Trump has the executive authority to alter, suspend, or revoke penalties as he deems appropriate or advisable. He can also do this by EO.

Over many years, various Acts have acted as legal basis for many actions by Trump:

- Global Magnitsky Human Rights Accountability Act – allows sanctions against foreign individuals involved in gross human rights violations or corruption.⁹²
- Countering America’s Adversaries through Sanctions Act (CAATSA) – authorises sanctions against entities doing business with Russia, Iran, or North Korea.⁹³
- International Emergency Economic Powers Act (IEEPA) – grants the president sweeping powers to regulate commerce and freeze assets during a national emergency involving foreign threats.⁹⁴ If South Africa is designated as a hostile economic actor, this Act could freeze ANC-linked bank accounts and block financial transactions.
- Section 7031(c) of the Department of State, Foreign Operations, and Related Programs Appropriations Act – directly bans foreign officials involved in significant corruption or human rights violations from entering the United States. No criminal conviction is necessary; justified suspicion is enough.⁹⁵
- USA Patriot Act, particularly section 311 – allows the Treasury to designate a foreign jurisdiction or institution as a ‘primary money laundering concern’.⁹⁶ This designation could devastate the global financial credibility of South Africa.
- Material support to foreign terrorist organisations statute⁹⁷ – criminalises any support – direct or indirect – to groups, such as Hamas. Public meetings between the ANC and Hamas officials fall under potential violation of this statute.
- Foreign Agents Registration Act (FARA)⁹⁸ – requires foreign entities acting in US political spheres to register as agents. If the ANC members or proxies engage in lobbying within US territory, they face criminal exposure under FARA.

From the above, it is clear that Trump already holds full legal authority to impose any of the following:

- Swift visa bans under 7031(c);⁹⁹
- Personal sanctions under the provisions of the Global Magnitsky Act;
- Institutional sanctions under CAATSA and IEEPA; and
- Economic warfare via the Patriot Act¹⁰⁰ and Treasury designations.¹⁰¹

During his first term of office, Trump imposed sanctions after issuing a specific EO, which dealt with the imposition of sanctions.¹⁰² Nothing prevents him from issuing such an Order again with even stiffer stipulations. Six months into his second term of office, the US sanctions policy has undergone notable shifts in both designation trends and enforcement activity. Since January 2025, the Trump administration has reinvigorated its sanctions agenda, with a renewed focus on Iran and China.¹⁰³ He already issued EOs that reinstated sanctions against Iran and some of its officials. On 3 February 2025, Trump's EO imposed wide-ranging sanctions on the ICC and specific court officials, primarily in retaliation for investigations and arrest warrants that could implicate US or Israeli officials in war crimes. The sanctions include asset freezes, travel bans, and prohibitions on US interaction with these officials.¹⁰⁴

When Trump imposed a 50 per cent tariff on Brazil on 30 July 2025, he also subjected a Justice of the Brazilian Supreme Court to sanctions for overseeing investigations into former Pres. Jair Bolsonaro. This is a highly unusual use of some of the gravest human rights sanctions the United States has at its disposal. In the EO Trump signed on 30 July 2025, he declares that recent policies, practices, and actions of the Government of Brazil constitute an unusual and extraordinary threat to the national security, foreign policy, and economy of the United States. He declared 'a national emergency concerning that threat'.¹⁰⁵

What is often forgotten is that Congress can impose sanctions of its own. Congressional sanctions may necessitate the president's imposition of specific penalties on designated persons, businesses, or countries. These statutes may link sanctions to explicit triggers, establish supervision mandates, or delineate the conditions under which sanctions may be waived or rescinded. Congress is the sole authority capable of lifting these penalties via a potentially protracted legislative procedure. Presidential sanctions are authorised swiftly and can be revoked at the president's discretion. In contrast, congressional sanctions are legally binding and often more challenging to suspend, as they can either overrule or bolster presidential actions.¹⁰⁶

The duration for Congress to rescind or abolish sanctions enacted by law does not adhere to a predetermined schedule. Congress must enact new legislation to modify or rescind current sanctions laws. The outcome is contingent upon the legislative process, the pertinent legislation regulating the punishments, and the current political dynamics. Specific sanction legislation has inherent waiting periods or notice obligations. Sanctions accompanied by substantial legislative monitoring or significant political support tend to endure longer and are more challenging to rescind promptly than executive sanctions proclaimed by the President. Legal termination serves as a considerable limitation, complicating and prolonging the process of rescinding sanctions, even following diplomatic or policy changes. The congressional repeal of legislatively imposed sanctions may take weeks, contingent on favourable political conditions, extend to years, or perhaps remain indefinitely unachieved without consensus. Specific legislative stipulations influence the process, the prevailing domestic political environment, and the gravity with which Congress addresses pertinent national security or foreign policy goals.¹⁰⁷ Attia emphasises that lifting sanctions is often harder than imposing them.¹⁰⁸ Congress needed

about 30 years to rescind the classification of Nelson Mandela as a terrorist. During the Reagan administration in the 1980s, the United States initially classified Mandela and the ANC as terrorists. Notwithstanding his election as president of South Africa in 1994, Mandela remained on the US terrorist watch list for decades. The circumstances were so ingrained that Mandela required special permission to enter the United States even after his presidency. The legislation to remove Mandela and the ANC from the US terrorist list was approved by both Chambers of Congress and enacted by Pres. George W Bush in July 2008, shortly before Mandela's ninetieth birthday.¹⁰⁹ Consequently, from the early to mid-1980s until July 2008, around 30 years had to pass before Congress took action to rescind the terrorist classification against Mandela and his ANC associates, more years than the duration of his imprisonment.

The Impact of Domestic Policies on Foreign Policy

The influence of domestic matters on foreign policy is now more evident than in recent US history. Pres. Trump has proved this. Foreign policy mirrors domestic policy, and foreign policy cannot be separated from its domestic environment.¹¹⁰ The interconnection between internal and global events is undeniable, as domestic factors largely shape foreign policy. Domestic pressures can manifest in various forms, and the interaction between foreign policy decision-makers and domestic constituencies is a real phenomenon. Foreign policy is developed neither in a vacuum nor in seclusion. It is ingrained in national interests, which consistently influence its parameters. Henry Kissinger's famous words are extremely apt. 'Foreign policy begins where domestic policy ends'.¹¹¹

Realists, such as Kissinger, prioritise stability and power balance over ideological goals, including the promotion of democracy or human rights. For Kissinger, a country that demands moral perfection in its foreign policy will achieve neither perfection nor security. He advanced two critical principles. The test of a 'policy is how it ends, not how it begins' and foreign policy is 'the art of establishing priorities'.¹¹² This reflects Kissinger's pragmatic, *realpolitik* approach to diplomacy, emphasising that effective foreign policy requires setting and managing clear priorities amid complex global challenges. President John F Kennedy, who had to face various serious foreign policy challenges, made the profound statement that 'domestic policy can only defeat us; foreign policy can kill us'.¹¹³ This remark highlights the importance of emphasising the critical and often existential stakes of foreign policy.

Foreign policy decision-makers must therefore understand domestic issues and policies thoroughly before devising and implementing an effective foreign strategy. It is imperative that domestic problems are incorporated into the analysis of foreign policy decision-making and that the influence of domestic affairs and their resultant effects on foreign policies be accurately evaluated. Trump's foreign policy is shaped by his "Make America Great Again" motto and the "America First" slogan. His foreign policy is significant only when it aligns with national interests and its advancement benefits the United States. He perceives his approach to foreign relations as the most pragmatic, prioritising the benefits for the United States. It is this interaction in the United States that the SA government appears to misunderstand; thus, ignoring and failing to take it seriously. To understand Trump's foreign policy, it is essential to understand the domestic political

scene in the United States, as well as the influences that affect it, including Congress and social media. The ANC has not yet grasped that domestic policies and practices have foreign policy implications. Negotiation starts at home; it is not only a foreign discourse. Diplomatic conversations encompass more than interacting with foreign peers; they are mainly coordinating internal resources. Diplomats have to manoeuvre through the intricate landscape of domestic politics, institutional interests, and public expectations. These home imperatives represent a crucial and often undervalued aspect of diplomacy. Proficiency in both international and domestic negotiating facets is therefore essential for a practical diplomatic approach.

Conclusion

South African relations with the United States are far more tenuous than most South Africans and the government, including the ANC, comprehend. It is no secret that there is a lack of tolerance for South Africa at the highest level of government in the United States, including Congress. The United States faces far more pressing challenges and issues than South Africa, which it has to address elsewhere in the world. South Africa appears to be out of sync with the strategic priorities of the United States. Geopolitical dynamics have changed, and new global challenges have emerged. States that have come to rely on US-backed alliances are undoubtedly recalibrating their approaches. Failure to understand and adjust to those foreign policy realities advanced by the United States could lead to numerous cascading diplomatic and economic consequences for South Africa. The repercussions of misreading US intentions can be disastrous. Currently, the SA government suffers from tunnel vision in its foreign policy, focusing excessively on Trump's pronouncements regarding SA domestic affairs. The application of 30 per cent tariffs may just be the beginning of more action against South Africa and could well be the fall of the first domino.

South Africa finds it challenging to formulate and apply a coherent foreign policy. It continues to operate in a fabricated reality brimming with self-importance and arrogance. Trump's presidency, which will last for more than three years to come, will still have profound ramifications in that period. Considering the negative sentiment that has already taken hold in Congress, it is evident that a catastrophe is imminent. Virtually no possibility of reversing this deteriorating trend seems possible. Attempts to engage with individuals on Capitol Hill will probably remain futile. Longstanding SA allies in Congress forged during and after the Nelson Mandela era appear to have dissipated to a large extent. One of the prime functions of the SA embassy is to work with Capitol Hill. That cardinal relationship with legislators in both Chambers and with both parties has been sadly neglected in recent years. Building these consequential relationships takes time and effort, even in the face of differing opinions and perspectives. South Africa can no longer afford to send retired comrades to steer its interests in these crucial corridors of power. More than six months have passed since Rasool's expulsion in March 2025. Ramaphosa has yet to appoint a replacement. The optics of this indecision are not only a sad reflection on his style of government, but undoubtedly seen in the corridors of power in the United States as a negative indication of how he considers relations with the United States. When the modus operandi of other countries is studied in terms of how they approached the United States, they are much more successful. It is clear that South Africa failed by default.

Characterising the mood against South Africa as hostile may be an understatement. As long as South Africa remains ignorant about the real reasons for the current US attitude toward South Africa, there will be friction and rejection. Developments in sanctions policy may arise as the Trump administration examines the extent and constraints of sanctions to further its geostrategic or domestic policy goals. Once a US president institutes sanctions, it does not prevent Congress from adopting legislation to enforce its sanctions. Under certain circumstances, a country, company or individual may face a dual set of sanctions. It is this duality that South Africa and the ANC – or only the ANC – may face if Trump and Congress, with the two Bills already introduced in the House, each decide to impose their own set of sanctions. South African policymakers will continue to decry this as unfair, unjust, and undeserved, fuelled by Ramaphosa's bravado that South Africa will not be bullied. Ramaphosa invariably believes he can sit back and let matters develop to his liking before attempting any action, and if not, he resorts to the blame game. South Africa has found it progressively challenging, if not impossible, to have it both ways. The United States is now making South Africa pay the price for its deliberately chosen irreconcilable positions.

In its bid to advance its foreign policy, South Africa has failed to conduct a risk analysis of the consequences of its actions. Had that been done, it would have been apparent to those driving SA foreign policy that enduring peace and long-term geopolitical stability can only be achieved through the calculated management of power rather than initial motivations or moral appeal. Tariffs are part and parcel of Trump's foreign policy. Through his tariff programme, he aims to transform global trade dynamics both economically and politically. These are not just employed to rectify trade imbalances to affect global alignment. Trade alignment is thereby intimately linked to geopolitical allegiance. Countries are now presented with a choice: engage and align, or confront the repercussions.

The current imbroglio with the United States will continue, and lessons learnt from the past will not be recalled. At the same time, South Africa continues to hold its one-sided conviction that it remains a significant force in the realm of international human rights. The SA government believes it can enforce its will to make a grandstand among its international supporters, while in reality, the new global order is taking shape without South Africa having any say in it. At most, the country will be reduced to a spectator. The ANC foreign policy, which South Africa advances, is a liability that threatens SA national prosperity.

South African foreign policy is in disarray. Yet, nothing exposes the anti-Western agenda of the ANC more starkly than its hostility towards Israel, with its pursuit of the case at the ICJ and support of the ICC. The ANC has brought its disastrous foreign policy posture on itself and the country. Nobody else is to be blamed for that snowballing fiasco. Tragically, Ramaphosa's infatuation with Cold War-style non-alignment is an anachronism that is costing him and South Africa the influence and respect he so desperately yearns for. Furthermore, he continues to be obsessed with promoting a failed ideology and the obsolete and meaningless slogans and rhetoric he constantly borrows from the liberation struggle of yesteryear. He did so again at the Liberation Movements Summit in Johannesburg on 27 July 2025. When South Africa and the ANC take note of Trump imposing a greater tariff

percentage on India and sanctions on Brazilian Supreme Court justice, the SA government must realise that their policies and behaviour have consequences.

Ramaphosa knows what to do to put SA relations with the United States on a sound footing. Incompetence is, however, ingrained in the body politic of South Africa. When the economy of a country shows signs of collapsing and becomes ungovernable, it is unrealistic to expect that its foreign policy will remain unaffected. South Africa lacks the diplomatic capital to support its self-assessed international importance. Diplomatic trust compounds with credibility. The significance of South Africa on the global scene has declined significantly over the past ten years, suffering an inevitable decline. This resulted in a stalemate situation with the United States. By continuing to misread US foreign policy, South Africa is putting itself at risk.

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Rivalry between the Lesotho Defence Force and the Lesotho Mounted Police Service: Causes, Manifestation and Remedy, 1966–2024

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Abstract

The end of the Cold War and the post-independence era saw many nations, including Lesotho, bolstering their security apparatus. As part of these efforts, Lesotho undertook reforms within its security forces, including the Lesotho Defence Force, the Lesotho Mounted Police Service, and the National Security Service. These developments led to growing tension between the Lesotho Defence Force and the Lesotho Mounted Police Service, which became arch-rivals following the independence of Lesotho in 1966. This rivalry hindered the two institutions from fulfilling their mandates effectively and professionally.

This article reports on the root causes of the conflict between the Lesotho Defence Force and the Lesotho Mounted Police Service, as well as internal divisions within the Lesotho Defence Force itself. The article shows how these tensions have manifested, the measures taken to address them within the security sector, and their broader impact on governance in Lesotho. The discussion concludes with key recommendations for fostering stability and cooperation.

Keywords: Lesotho, Rivalry, Politicisation, Lesotho Defence Force (LDF), Lesotho Mounted Police Service (LMPS), Governance

Introduction

The origins of the Lesotho Defence Force (LDF) and the Lesotho Mounted Police Service (LMPS) trace back to the colonial era when Lesotho came under British rule in 1868.¹ In 1872, British colonial administrator and army officer Colonel Charles Griffith established the Basutoland Mounted Police (BMP), the precursor to today's LDF.² The BMP later expanded with the creation of Police Mobile Units (PMUs) in 1963, designed to manage political unrest amid British concerns that the Basutoland Congress Party (BCP) was a militant and potentially dangerous organisation.³ Towards the end of 1967, recruitment for the PMU doubled from four to eight platoons. Some of its leaders were John Hurst, John S McFall, and Justin Lekhanya,⁴ as well as Fred Roach.⁵

With the end of the Cold War in 1991, the dismantling of apartheid in South Africa, and the wave of independence across Southern Africa, many countries, including Lesotho, embarked on security sector reforms. These reforms were shaped by emerging security threats, national identity, rising nationalism, and local, regional, and continental interests.⁶

Lesotho became independent on 4 October 1966. In 1979, the then prime minister (PM), Leabua Jonathan, transformed part of the PMU into the Lesotho Paramilitary Force (LPP), under the command of Lekhanya.⁷ At the time, the country only had a police unit, as it did not yet have a formal defence force. This changed in the 1980s when the defence force was established, evolving into the Lesotho Defence Force (LDF), which included both an army and an air wing. Its motto was *Tshepo ea Sechaba* (Hope of the Nation). After the military coup of 1986, the LDF was renamed the Royal Lesotho Defence Force (RLDF) because of cordial relations between the Military Council under Lekhanya and His Majesty King, Moshoeshoe II. The entity only reverted to the name LDF in 1993 after multiparty elections, thirteen years after the independence of the country.⁸ At the time, Lesotho was stable, having recently transitioned from military rule. The newly elected democratic government introduced new frameworks for the LDF.⁹

In most democracies, the security apparatus is commonly governed or guided by the principles of subordination of the military to democratic civilian authority, allegiance to the state, a commitment to political neutrality, and an ethical institutional culture.¹⁰ Under democratic civilian leadership, security actors are empowered to implement a citizen-based security strategy, gaining the trust and support of the public in the process. Briefly, the above principles call for activities to embody basic values, such as acceptance of the legitimacy of democratic institutions, non-partisanship in the political process, and respect for and defence of individuals' human rights.¹¹ In Lesotho, the security apparatus became deeply entangled in politics and internal conflicts, driven by overlapping mandates and power struggles. This led to distrust, suspicion, and a lack of cooperation among security forces.¹²

By law, the LDF was tasked with a range of responsibilities, including protecting territorial integrity and sovereignty; assisting in the preservation of life, health, and property; and maintaining essential services.¹³ Additionally, the LDF supported civil authorities, such as the LMPS, upheld law and order, and provided assistance to other state departments as directed by government. It also played a role in ensuring compliance by the country with international obligations, including participation in peace support operations and regional military cooperation, as well as preventing and suppressing terrorism, among other duties determined from time to time by the minister responsible.¹⁴ The current commander of the LDF is Lieutenant General (Lt Gen.) Mojalefa Letsoela. He was appointed on 23 January 2018 and was to retire on 30 August 2025. Government has extended his tenure for an additional three years until 3 August 2028 due to a need for continued stability and leadership within the LDF.¹⁵

Another branch of the PMU remained a police force known as "Basutoland Mounted Police" from 1878 until independence in 1966. Following the 1986 coup, this branch was renamed the "Royal Lesotho Mounted Police", a title retained until 1998. Since then, it has been known as the "Lesotho Mounted Police Service" (LMPS).¹⁶ The LMPS operates under the motto *Lepolesa Motsoalle* – "A helper, a friend".

By law, the LMPS is responsible for maintaining law and order, preserving peace, protecting life and property, preventing and investigating crime, apprehending offenders, and bringing offenders or criminals to justice, among other duties.¹⁷ All police officers are

expected to adhere to these responsibilities at all times. Advocate Borotho Matsoso has served as the Commissioner of the LMPS since 24 May 2024, following his swearing-in by PM Ntsokoane Sam Matekane.¹⁸

Since independence in 1966, cooperation and amicable relations existed between the LDF and the LMPS.¹⁹ The situation changed in 1993 when Ntsu Mokhehle became prime minister. A lack of governance experience laid the groundwork for a deepening rivalry between the LDF and the LMPS. Mokhehle's government was met with distrust from the security apparatus, as these forces had historically been aligned against him, his party – the Basutoland Congress Party (BCP) – and its military wing, the Lesotho Liberation Army (LLA). Both the LDF and the LMPS experienced mutinies, ostensibly over demands for pay increases. When the LMPS mutinied and occupied police headquarters, Mokhehle ordered the LDF to launch an attack on the police headquarters. This confrontation set a dangerous precedent for hostility between the two institutions. In the Sesotho language, the rivalry between the two security apparatus was described as “*Dijana maro ntja tsa setsomi*” (Brothers are fighting).²⁰

Causes of Political Rivalry between the LDF and the LMPS

Various factors contributed to rivalry between the LDF and the LMPS. The author identified two key factors.

- First, overlapping mandates between the LDF and the LMPS manifested as a turf war between the two entities. In some instances, the members of the LDF and the LMPS found themselves patrolling the same area.²¹
- Second, politicisation of the security sector in the country, although the politicisation of the LDF and LMPS in Lesotho is not a new phenomenon. This political–military relationship can be traced back and/or attributed to a number of socio-political events, which can be categorised into two notable eras, namely the era of ‘autocratic rule’ (1965–1986), and the era of ‘military rule’ (1986–1993). In these periods, the LDF was used more or less to access, maintain and/or exercise government power vis-à-vis ‘maintaining the political and social status quo’.²² What was experienced later in the current ‘democratic civilian rule’ (1993 to the present) was a result and consequence of these two eras.

After independence in 1966, Leabua Jonathan depended on PMUs to conduct politics and to maintain power when his legitimacy waned.²³ He also used the PMUs to intimidate opposition parties, and to secure and sustain political power.²⁴ Politicisation of the security apparatus therefore started immediately after independence.²⁵ In 1970, Jonathan staged a coup.²⁶ Consequently, Jonathan achieved his unconstitutional stay in office with the help of the PMU. After the 1970 coup d'état, the Basutho National Party (BNP) government exercised stringent control over the armed forces, and shaped the military to serve its own political ends.²⁷ The Lesotho security sector, comprising the LDF and the LMPS, has frequently interfered in political affairs, both directly and indirectly. These institutions have often taken sides in high-level political battles, with one faction supporting the government while the other aligned with the opposition.

Moreover, the LDF and LMPS were actively and openly involved in political disputes, often being used as instruments of intimidation, torture, and even assassination of politicians, as well as the suppression of political activism.²⁸ Undoubtedly, this can be attributed to the historical relationship between politics, the LDF, and the LMPS following independence.

During the tenure of Lt Gen. Tlali Kamoli (2012–2014 & 2015–2016 respectively) and of Commissioner of the LMPS Khotatso Tšooana (2014–2015), tensions between the LDF and the MPS escalated to unprecedented levels, eventually leading to open confrontation in 2014.²⁹ Tšooana identified Kamoli as the primary source of instability in the country, stating that LMPS officers constantly feared attacks from the LDF. On the other hand, Kamoli warned the LMPS against closing roads at night, arguing that such actions hindered the ability of the LDF to carry out its patrol duties. He further cautioned that the LDF was losing patience. This period was marked by escalating accusations and counter-accusations between the two institutions, deepening distrust and further destabilising the country.³⁰

Before the 2015 elections, Robyn Dixon, a researcher studying Lesotho history, corroborated a view that politicisation of the security forces was a dangerous sign to peace and stability in the country.³¹ In February 1997, the LMPS staged a protest at their headquarters in Maseru during which they refused to comply with the BCP-led government instruction to resume duties. On 12 February 1997, government resolved to use the LDF against the LMPS, and on 16 February 1997, the LDF attacked the Maseru LMPS Headquarters. Guns and explosions rocked the capital Maseru between 06:00 and 13:00. Due to LDF power and strength, the battle was one-sided, and the LMPS members surrendered.³² This event marked the beginning of animosity between the LDF and the LMPS.³³

After the subjugation of the LMPS by the LDF, one of the opposition leaders, Molapo Qhobela made two observations:

- Mokhehle has wittingly or unwittingly sown seeds of dissension between the army and the police; and
- Mokhehle has made the army aware of its power, which would one day turn that strength against him.³⁴

Manifestation of Rivalry between the LDF and the LMPS

After the 2012 elections, no single political party secured a majority, leading to the formation of the first-ever coalition government in Lesotho.³⁵ This coalition comprised three political parties: the All Basotho Convention (ABC) led by Thomas Thabane, the Basotho National Party (BNP) led by Chief Thesele Maseribane, and the Lesotho Congress for Democracy (LCD) led by Mothejoa Metsing, who became the Deputy Prime Minister (DPM).³⁶ At the time, there were different political alignments between the LMPS and the LDF. Tšooana of the LMPS was seen to be affiliated to the ABC.³⁷ On the other hand, Kamoli was regarded as affiliated to the LCD.

The administration of the former PM, Pakalitha Mosisili (2015–2017), was suspect and largely seen to be supported by the army under the former LDF commander, Kamoli. Former PM Thabane's (2012–2015) administration was viewed to be supported by the late and former LDF Commander Lt Gen. Mahao, and the head of the LMPS, Tšooana.³⁸ The security sector in Lesotho was seen as a crucial tool for the political elites in the country shaping the distribution of power and resources. This, however, often came at great cost, resulting in numerous casualties among security personnel, civilians, and government officials.³⁹

The rivalry within the LDF resulted in the killing of Mahao. Those responsible for his murder were arrested, and their prosecution is still underway.⁴⁰

Appearing before Justice Charles K Hungwe as the Crown's fourteenth witness in the Mahao murder case, Tšooana directly implicated Kamoli as the mastermind behind the killing.⁴¹ Tšooana testified that, after his appointment, he pursued several criminal cases involving LDF members under Kamoli's command. He sought to have these cases handed over for investigation, and requested that firearms used in two crimes in the Mafeteng district be surrendered.⁴²

A request was made to Kamoli because LDF members could not be arrested directly by the LMPS; instead, they had to be apprehended by the Military Police (MPs), who would then hand them over to the LMPS. Consequently, the LMPS formally requested Kamoli to instruct the MPs to arrest the implicated soldiers and to transfer them to police custody. Tšooana's attempts to secure their release were however unsuccessful.

Testifying in court, Tšooana revealed that, as tensions between him and Kamoli escalated, he received an intelligence report indicating a plot to assassinate both himself and Mahao. Further investigations uncovered that the LDF members who attacked Mahao's home on 30 August 2014, had been tasked with killing him on that same day. Those implicated in attacking Mahao's home were Colonel Tefo Hashatsi, Brigadier Bulane Sechele, Private Posholi and Corporal Mokete Halahala.⁴³

The 2015 Southern African Development Community (SADC) Commission of Inquiry, which investigated the assassination of Mahao, found that Kamoli was a polarising figure, not only in the army, but also in the politics of Lesotho. The Commission therefore recommended that he be relieved of his duties as a commander. In addition, enough evidence was presented to the Commission to indicate that 'a section within LDF is law unto itself having been involved in several criminal atrocities in Lesotho, and that several attempts by the LMPS to have access to the suspects were denied'.⁴⁴

Tšooana testified before court that the LMPS tried for more than two years to arrest the LDF members implicated in several criminal cases, but Kamoli refused to hand over the suspects. The implicated LDF members were, Captain Litekanyo Nyakane, Lance Corporals Khauhelo Makoae and Sebilo Sebilo, as well as Privates Tsepi Tlakeli and Thebe Ntsepe. Paradoxically, those accused of crimes, such as assault, were released to the LMPS as requested.⁴⁵

Kamoli confirmed that he did not release some members of the LDF wanted for questioning regarding human rights violations because he feared for their safety, given the notorious reputation of the LMPS for torturing and killing suspects at the time.⁴⁶ The issue of LMPS brutality was merely a pretext, as the LDF had already handed over members accused of petty crimes. If concerns about police brutality were genuine, then no LDF member should have been surrendered to the LMPS in the first place. Kamoli went so far as to hold press briefings to undermine the LMPS command publicly.⁴⁷ In one such briefing, he told journalists that the title of the Army Commander was written with a capital C, whereas the title of the Commissioner of Police was written with a small c, implying a hierarchy in authority. The LMPS command did not respond to such media statements.⁴⁸ The LDF, under Kamoli's command, used any available opportunity to undermine the command of the LMPS, and this heightened the rivalry between the two institutions.⁴⁹

Ultimately, the rivalry between the LDF and the LMPS also created conflict within the LDF itself. During Kamoli's tenure as Commander of the LDF, some members of the LDF engaged in criminal activities.⁵⁰ For instance, some members attempted to assassinate Tsooana and his family, carrying out bomb attacks on his Ha Abia⁵¹ residence, as well as on the Moshoeshoe II home of former First Lady Maesaiah Thabane. When the LMPS completed their investigations, Kamoli refused to hand over the implicated members of the LDF and the ammunition used.⁵² Not only that, Mahao reprimanded Captain Hashatsi who argued that he did not accept the change of command of the LDF by government.⁵³ This incident led to Mahao being hauled before the court martial, which was ultimately disbanded and the charges dropped. Evidence collected by the SADC Commission of Inquiry confirmed:

Lieutenant General Kamoli was neither comfortable nor at ease with Brigadier Mahao, thus he regarded him the enemy of the state. The division became even more evident after the removal and appointment of Lieutenant General Kamoli and Brigadier Mahao respectively.⁵⁴

The rift within the LDF was confirmed by the Judge Phumaphi Commission of Inquiry, which argued:

Soldiers were then divided into two groups, [the] majority of those who joined the army in 1996 known as the Intake 21 rallied behind Brigadier Mahao, while others rallied behind Lieutenant General Kamoli.⁵⁵

Divisions within the LDF were visible to the extent that Hashatsi publicly declared that Mahao would never become the LDF commander, and further stating that such an appointment would happen 'only over his dead body'.⁵⁶ Hashatsi's statement was made on 29 August 2014, following the announcement of Mahao as the new LDF Commander. A staunch Kamoli loyalist, Hashatsi openly expressed his discontent with the decision. He was one of the participants in the attack of Mahao's property during the fateful event of 30 August 2014 and his assassination in June 2015. Hashatsi's statement implied two things. First, he would defend Kamoli at all cost even if he were to lose his life. Second, he was determined to defy the civilian authority if Kamoli were to be removed.

In an interview with one of the local news outlets, Mahao narrated one of the major incidents where he reprimanded Hashatsi – then captain and head of LDF Special Forces – for the apparent lack of respect for civilian control over democratic control of the military, an issue that worsened Mahao’s already sour relations with Kamoli.⁵⁷ Consequently, Mahao was branded an enemy of the state, and Kamoli, along with his supporters within the LDF, orchestrated a plan to remove Mahao from the army. Despite multiple attempts, including an assassination attempt on 30 August 2014, all their efforts initially failed.⁵⁸

After multiple failed attempts to remove Mahao from the LDF, some members assassinated him on the morning of 25 June 2015, while he was travelling from his home village, Mokena, near Maseru. Following the attack, one of the soldiers made a call and reported, ‘We found him. We shot him. I am with Sergeant Majara.’⁵⁹

Kamoli refused to hand over those suspected of killing Mahao, despite recommendations by the 2015 SADC Commission of Inquiry. The Commission established that Mahao had faced persistent threats from some LDF members, who had openly declared – before military parades – that he would be shot if he set foot in the barracks.⁶⁰

The Commission of Inquiry further found that, on a balance of probability,⁶¹ Mahao did not resist arrest, contrary to claims made by the LDF members who killed him. Instead, Mahao died from bullet wounds inflicted by three close-range shots from an AK-47 rifle.

Among its recommendations, the SADC Commission of Inquiry investigating the circumstances leading to the assassination of Brigadier Mahao urged Lesotho to ensure a criminal investigation into Mahao’s death, with the LMPS adequately resourced to bring the case to finality through a transparent justice process.⁶²

Testifying before the High Court on the assassination of Mahao, Letsoela laid blame on interference by authorities in army affairs as a root cause of the instability that led to the fatal shooting of Mahao in 2015. Letsoela painted a picture of a deeply fractured military, where divided loyalties and defiance of lawful authority paved the way for chaos and ultimately, tragedy. Letsoela told the court that Mahao had been lawfully appointed as the Commander of the LDF on 29 August 2014, by Thabane as a competent authority. The change in command was however never fully realised due to what Letsoela described as ‘unhealthy civil-military relations’ and deliberate interference from senior officials and politicians.⁶³ Letsoela further testified, that, Mahao’s appointment, although lawful, was not honoured. Kamoli had been lawfully relieved of his duties; yet, he continued to exercise power within the army. This created two centres of command, one under Kamoli, the other under Mahao. According to Letsoela, this dual command structure bred division and confusion within the military ranks. Soldiers were unsure whom to obey, and factions began to form, a dangerous situation for any disciplined force, but particularly volatile in a politically sensitive environment, such as Lesotho at the time.⁶⁴

The LDF often contested for operational space with the LMPS.⁶⁵ At the time, the Deputy Commander of LDF, Maj. Gen Matela Matobakele, reprimanding LMPS for not making progress to resolve the high murder rates in the country, commented, 'Lesotho has no police force to speak about.'⁶⁶ The undermining between the LDF and the LMPS gained such momentum in 2014 that it almost led to an open conflict between the two agencies.⁶⁷

On 30 August 2014, the LDF launched a failed coup after allegations that the LDF had seized weapons from several police stations in the country. At the police headquarters, the LDF demanded the criminal dockets of DPM Metsing who was accused of corruption relating to allegations of receiving kickbacks from a company in terms of a lucrative road construction tender project.⁶⁸ Corruption is viewed as a universal problem and a highly contagious disease that goes deep and involves the awarding of tenders and contracts by the corruptor and the corruptee.⁶⁹ Failure to produce the abovementioned docket resulted in the killing of Sub-Inspector Mokheseng Ramahloko and the injury of some LMPS members by some LDF members.⁷⁰ At the LMPS headquarters, the LDF demanded access to the LMPS armoury and the files on the most sensitive high-profile anti-corruption investigations.⁷¹ After the killing of Ramahloko, there was an outcry in the country for the arrest of Kamoli. Mosisili, however, argued against the arrest saying Kamoli's arrest might trigger 'atrocities and [a] bloodbath'.⁷² The response by Mosisili was clearly shutting down the role of the LMPS, as he protected the LDF commander despite the public nature of the LDF atrocities.

Following the killing of Ramahloko, the LDF surrounded Thabane's residence in Maseru and jammed the communication system. Residents and diplomats in the neighbourhood said the following:

Thabane said he fired the LDF Commander, Lieutenant General Kennedy Tlali Kamoli, replacing him with Brigadier Maaparankoe Mahao. But the Army spokesperson ... said Kamoli was still in charge of the military. Thabane said, Commanders of the armies are appointed by government, it is not up to them to say who is in control.⁷³

The military, however, denied staging a coup after an announcement by South Africa that it would not allow a coup in Lesotho. Every time there is a conflict in Lesotho, it spills over into South Africa; consequently, South Africa serves as an external stability element because of diplomatic relations between the two countries.⁷⁴

On 1 December 2016, Kamoli resigned as commander of the LDF following the recommendations of the SADC Commission of Inquiry, mounting pressure from the SADC and the international community, and the United States threatening to remove Lesotho from the African Growth and Opportunity Act (AGOA).⁷⁵ He was succeeded by Lt Gen Khoantle Motsomotso, who was committed to handing over all LDF members implicated in the aforementioned criminal activities to the LMPS.⁷⁶

Motsomotso's stance deepened divisions within the LDF. High-ranking officers, Hashatsi and Sechele, accused him of betraying them to the police, citing that no LDF members had been arrested under Kamoli's command. As tensions escalated, Motsomotso was

assassinated in his office on 5 September 2017 by Hashatsi and Sechele – just two years after Mahao’s assassination. The same rogue elements, also involved in Mahao’s killing, sought to destabilise the country in the wake of the 2017 elections.⁷⁷ Motsomotso’s “crime” was his commitment to restoring order, discipline, and respect for command and authority within the LDF, ensuring democratic civilian oversight of the military. His assassination triggered the deployment of the 269-strong SADC Standby Force, known as the “SADC Prevention Mission in Lesotho” (SAPMIL), which operated from 2 December 2017 to 28 November 2018.⁷⁸ The author is of the opinion that none of the LDF members was prepared to take accountability for their actions, and they resorted to various means, including killings and assassinations.

In 2024, Matobakele called for a three-month state of emergency to empower the LDF to sweep across the country and curb domestic violence. By implication, Matobakele suggested that the LMPS was not fulfilling their duties. Matekane concurred with Matobakele, and said:

Deploy men and women from your team to help end these killings. Do everything in your power to restore peace in Lesotho ... We have witnessed your dedication in Mozambique – now, the same commitment is needed here to put an end to this violence.⁷⁹

The remarks by Matobakele and Matekane faced criticism from various quarters, as they implied a lack of competence within the LMPS.

Efforts Aimed at Improving the Relations between the LDF and the LMPS

At the Prime Minister’s Cluster meeting held on 30 October 2024, issues of trust and the lack of joint operation became the centre of attention. In this regard, the chairperson of the Prime Minister’s Cluster Committee, Kobile Letlailana, asked about the relationship between the LDF and the LMPS regarding joint operations. Letlailana also sought clarification on when and why the LDF gets involved in police operations. In response, LDF Commander, Lt Gen. Letsoela, indicated that the lack of joint operations between the LDF and the LMPS had created cooperation gaps, and recommended an audit of the security apparatus in order to address existing issues.⁸⁰ Without audit, trust issues among the agencies would persist. Lt Gen Letsoela referred to section 5 of the Lesotho Defence Force Act (No. 4 of 1996) that permits independent operations, such as Operation Hard Fist, allowing the military to suppress terrorism, maintain order, and prevent crime, especially in situations of high crime prevalence. He concluded by adding that these coordination failures should not be viewed as personal disputes, but rather as institutional problems.⁸¹

After sending the commands of the LDF and the LMPS on leave of absence, the acting commands organised a joint walk in which they took the lead. At the time, Maj. Gen. Lineo Poopa led the LDF and Acting Commissioner Koketso Monaheng led the LMPS. The walk started in the city centre⁸² of Maseru and ended at Makoanyane Barracks. During the walk, both commands of the LDF and the LMPS delivered messages of support and

appealed to their respective members to work together and respect each other's mandates. This initiative gave hope that there would be reconciliation between the two entities.⁸³

The Transformation and Resource Centre (TRC) and the Women in Law in Southern Africa (WLSA), organised the "Makhoakhoa Walk" where the community, members of the LDF, and the LMPS participated in the annual walk. This 30-km-long walk is held annually from 1–4 October.⁸⁴ One of the key objectives of the walk is to foster harmonious relations between the LDF and the LMPS, as well as the communities they serve.

On 15 May 2019, the security sector leadership comprising the LDF, the LMPS and the Lesotho Correctional Services (LCS) held a high-level meeting in Maseru, sponsored by United Nations Development Programme (UNDP).⁸⁵ The LDF, LMPS and LCS affirmed their support for the ongoing national dialogue and reform process with a commitment to work together in ensuring that the rule of law is upheld in the country, and to prevent all forms of human rights abuse.⁸⁶

The words of the LDF Commander Lt Gen. Letsoela resonated well with the aspiration of collaborations among the security apparatus in Lesotho when he said:

The Lesotho army has the primary mandate to defend the sovereignty and protect the independence of Lesotho including the citizens' human rights but this mandate is not achievable in isolation ... LDF has to work collectively with other sister entities to achieve their primary mandate.⁸⁷

The current author is of the opinion that the security sector in Lesotho, as in many other nations, operates with interdependence, despite the distinct mandates of its various entities. For instance, the LDF and LMPS should collaborate to maintain peace and stability in the country.

Deployment of the SADC Observer Mission

The SADC mission was established following the appointment of Mr Cyril Ramaphosa, the then Deputy President of South Africa, as the SADC Facilitator to Lesotho. The SADC Observer Mission to the Kingdom of Lesotho (SOMILES), led by Ambassador Fanie Phakula, sought to reconcile the LDF and the LMPS under the leadership of Kamoli and Tšooana, respectively. Tensions remained high, however, with both commanders openly antagonising each other even in the presence of SOMILES.⁸⁸

In an attempt to ease hostilities, SOMILES recommended a leave of absence for both commanders. Unfortunately, this measure failed to achieve its intended purpose. Instead, two successive LDF commanders were later assassinated, and the rivalry between the LDF and LMPS persisted, undermining any prospects for cooperation.

Deployment of the SADC Preventive Mission to the Kingdom of Lesotho

As tensions between the LDF and LMPS escalated, the SADC Preventive Mission to the Kingdom of Lesotho (SAPMIL) was deployed to support security sector reforms. The mission comprised 258 personnel, namely:

- 207 military personnel;
- 15 intelligence officers;
- 24 police officers; and
- 12 civilian experts from various fields.

The SAPMIL mandate was set for six months, and was directed in facilitating lasting reforms by:

- Strengthening peace and security, implement security sector reforms;
- Identifying immediate areas of priority that are to be implemented urgently, including the specific amendments in the LDF section 24 and section 4 of LMPS Acts respectively with a view to ensuring separation of powers between the Army and Police; and
- Undertaking re-training of its personnel, especially in the area of civil–military relations (CMR).⁸⁹

The SADC was explicit that SAPMIL was not deployed to take over or replace the LDF or the LMPS, but rather to support and complement the efforts of the Oversight Committee and assist the government of Lesotho in its quest to attain lasting peace and security in the country.

Impact of the LDF–LMPS Rivalry in Governance

The power struggle between the LDF and the LMPS had significant implications for stability in the country and the political landscape. The government was forced to seek external support every time there was rivalry between the two security entities.⁹⁰ Weisfelder confirms this when he says:

[A]lmost all Lesotho's past and present leaders have, at one time or other, denounced South African interference with Lesotho's sovereignty. Nevertheless, the same leaders have not hesitated to call for assistance when their own power has been threatened, often asking for more extensive engagement than SADC and South Africa permitted.⁹¹

The deep-seated rivalry between the security apparatus in Lesotho had a spill-over effect into the LDF itself. This internal discord ultimately led to the assassination of successive LDF commanders by their own subordinates – soldiers who, under international military norms, were duty-bound to honour and serve them.⁹² The protection by the law made some members of the LDF to be a law unto themselves undermining the Lesotho Constitution and the LDF Code of Conduct.

The attack on the LMPS headquarters and the defeat of the police by the LDF in 1997 made the LDF conscious of its power. Consequently, the LDF supported several coups in the country in 1970, 1986, 1998 and an attempted coup in 2014 respectively.⁹³ The LDF tasted power from 1986 for almost six years under Lekhanya who, ironically, also lost power through a coup in 1991.⁹⁴

In August 2015, the LDF launched a second attack on the LMPS headquarters, justifying their actions by claiming they had intelligence suggesting the LMPS intended to arm mass protesters.⁹⁵ This assault was, however, largely a demonstration of power, as the LMPS offered little to no resistance. Many officers fled, while those who remained were brutally beaten and severely assaulted.⁹⁶

The politicisation of these institutions often resulted in state capture by some of the political elite who were determined to govern in perpetuity for personal gain, and through extreme forms of patronage and militarised repression.⁹⁷ As the current author sees it, the entanglement of security establishments with political parties has severely undermined democracy and will continue to do so unless the LDF and LMPS disengage from partisan politics. This toxic relationship has been a persistent source of instability in the country.

Justice was delayed for many Basotho who suffered violations at the hands of some LDF members, as Kamoli refused to hand them over to the LMPS. This reluctance fostered a culture of impunity within the LDF, as its members knew they were shielded from accountability.

The politicisation of both the LDF and LMPS led these security entities to fight political battles on behalf of politicians, thereby undermining the Lesotho Constitution. Expressing his concerns over this troubling dynamic, Principal Chief of Matsieng, Khoabane Theko, lamented, 'Politicians think they cannot do anything if they do not have the backup from the army.'⁹⁹ Sharing similar sentiments is Dimpho Motsamai who says:

The military's involvement in Lesotho politics is still an aberration and symptomatic of a malfunctioning political system. It is also underlined the inevitability of the politicisation of security institutions because the security forces have been drawn into high-level political disputes.¹⁰⁰

The LMPS strike that was ended by the LDF had disrupted the normal LMPS services, such as crime prevention, criminal investigations, and patrols. The relations between the politicians and the leadership of some security commanders undermined governance in the country.

Some politicians, such as Mosisili, appeased and patronised the LDF. For example, after 2015 elections, Mosisili publicly thanked the LDF for helping him gain power, and declared that he would not have been in office if it were not for the help of the military. 'Had it not been for you, I would not be here.'¹⁰¹ Such sentiments from Mosisili enhanced the ego of the LDF, and it was not surprising that Kamoli later referred to himself as 'The Right Honourable' Commander of the LDF.¹⁰² According to Mafa Sejanamane, Kamoli – as Commander of the LDF – was practically the one in charge of government.¹⁰³ In

the British governance system, the title “Right Honourable” is reserved for the prime minister and is not used in the military.¹⁰⁴ Kamoli, however, perceived himself as being on a par with the prime minister.

Tšooana and Kamoli defied civilian control. Tšooana refused to meet with then DPM Metsing, as Tšooana was more aligned with Thabane’s party, the ABC, than with DPM Metsing’s LCD. Instead, Tšooana insisted that any meeting should be arranged through the office of the Minister of Police – who at the time was Thabane himself.¹⁰⁵ As a result, governance matters could not be addressed because of political alignments between DPM Metsing and Tšooana.

Similarly, on 29 August 2014, Thabane dismissed Kamoli from the command of the LDF. Kamoli refused to comply, and went public that he was still the commander.¹⁰⁶ The then DPM Metsing also went public, and announced that he did not recognise the dismissal of Kamoli by Thabane.¹⁰⁷ The defiance of Thabane by Kamoli clearly showed the broken CMR.¹⁰⁸ Supporting the position of LCD leader, DPM Metsing, was the LDF. In his testimony to the SADC Commission of Inquiry, Sechele told the commission how the then LDF command dismissed allegations that Kamoli was removed, and that Mahao was appointed his successor. Sechele also testified that the LDF did not recognise former Thabane as legitimate, and that the police were not allowed to interrogate or arrest soldiers.¹⁰⁹ This bears testimony that the LDF under Kamoli did not recognise the civilian rule led by Thabane.

Recommendation and Conclusion

Comprehensive security sector reforms are urgently needed to address overlapping mandates, while complementing each other rather than competing with each other and to ensure that security entities uphold the Lesotho Constitution. Stakeholders should identify immediate priority areas for implementation, including specific legislative amendments and revisions of the relevant acts for clear mandates and responsibilities between the LDF and the LMPS, for example, section 5 of the Lesotho Defence Force Act (No. 4 of 1996) provides for the secondary or internal functions of the LDF, including assistance in the preservation of essential services and maintenance of law and order in support of the police when required, and section 4 of the Police Service Act (No. 7 of 1998) defines the primary police mandate and their responsibilities. Additionally, well-defined guidelines should be established to regulate the role of the LDF in relation to other security components.

Encouraging joint projects between the LDF and the LMPS will foster cooperation and contribute to lasting peace and stability in the country. A lesson learnt here is that politicians should refrain from politicising security institutions for personal gain. Furthermore, regular refresher courses for both the LDF and the LMPS are essential to reinforce professionalism, mandates, and strict adherence to codes of conduct. Capacity-building initiatives in CMR should be prioritised to enhance understanding and collaboration between security forces and civilians.

Scholars, such as Tlohang Letsie, have proposed the disbanding of the LDF and strengthening the LMPS, arguing that Lesotho, lacking external enemies, does not require

a military force.¹¹⁰ This perspective warrants serious consideration among stakeholders as they seek lasting peace, security, and political and economic stability in Lesotho.

Lesotho can gain insight from nations, such as Costa Rica, Iceland, Mauritius, Monaco, Panama, and Vanuatu, which have no standing armies but maintain well-equipped police forces, often referred to as gendarmerie units.¹¹¹ It is, however, also important to acknowledge that Lesotho may have ambitions to participate in regional peace and stability efforts, such as Southern African Development Community Mission in Mozambique (SAMIM)¹¹² and other multilateral deployments. This strategic role could make the prospect of operating without an army less appealing.

Endnotes

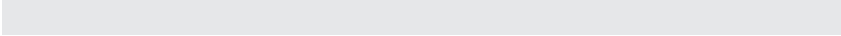
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Book Review

The Resurgence of Military Coups and Democratic Relapse in Africa

Adeoye Akinola (ed.)

Cham: Palgrave Macmillan
2024, 258 pages
ISBN 978-3-031-51018-2

The Resurgence of Military Coups and Democratic Relapse in Africa is an edited book that presents a view of the notable spread of military coups across the African continent in recent years. The editor of the book, Adeoye Akinola, is head of Research and Teaching, and head of the African Union Studies Unit at the Institute for Pan-African Thought and Conversation, University of Johannesburg, South Africa. The book gathered insights from different scholars who ventured into the complex tapestry of political instability that has characterised many African nations, especially in the Sahel region. The book opens with a comprehensive analysis of the historical context of military interventions in African politics, enhancing the discourse around coups and governance in Africa.

In the preface, the editor adopts a critical tone about the state of democracy in Africa when he says, ‘Despite notable instances of political transformation, a good number of African nations still struggle beyond the superficiality of periodic elections and intermittent political transitions.’¹ The primary argument of the book centres on the thesis that recurring military coups are symptomatic of deeper issues within African governance, particularly reflecting on how established political elites manoeuvre constitutional norms to maintain power. The contributions within the book span diverse analytical lenses – from the political economy of coup d’états to examinations of historical trends and the nature of contemporary military states.² Each chapter brings an addition to understanding why these coups are no longer anomalies but rather, in many contexts, increasingly accepted reactions to political shortcomings.

The prevailing themes tackled in this book include the fragility of democracy in Africa (Chapters 2–3, and Chapter 10), the political and economic ramifications of military interventions (Chapter 1 and Chapter 6), and the active roles of both regional and international actors in these processes (Chapters 8–9). Particularly, the book calls for revisiting the relationships between military forces and civilian governments, highlighting the need for sustainable democratic practices. Chapter 4 stands as a fascinating chapter as Gwinyai R Taruvinga discusses the role of misgovernance as a critical element in the occurrence of military coups: ‘The breakdown of the social contract in Mali has been key to two consecutive military coups.’³ This assertion encapsulates the essence of the argument forwarded by the book, emphasising that the discontent of the electorate with the failings in governance can result in upheaval against operational state structures.

Arguably, there is a critical link between the decline of democratic governance and the resurgence of military interventions in African nations. The book effectively highlights that, as democratic institutions weaken due to corruption and mismanagement, military coups become perceived as necessary solutions to restore stability. Through various case studies including Mali, Côte d'Ivoire and Togo, Akinola and the contributors illustrate how these coups are symptomatic of a broader crisis in governance, underlining the urgent need for stakeholders to engage in strengthening democratic resilience to break this troubling cycle.

Akinola and the authors made use of a good number of methodologies, including quantitative analyses of coup frequencies and qualitative case studies that unveil particular instances of democratic regression. The book reflects a multi-disciplinary approach, integrating political science, sociology, and historical analysis. A good example is Chapter 5, which comprises Issaka K Souaré's discussion of patterns and case studies of military coups. The chapter shows statistical compilations that reveal trends in coup occurrences over the decades, 'From 1952 to 2022, 98 successful military coups have been recorded on the continent.'⁴ Such data-driven insights give the text reliability and solid grounds in empirical evidence.

The book boasts some important strengths. One such strength is the timely exploration of recent coups within context, which are not discussed as mere reactions, but include a larger narrative of governance and resistance against power consolidation. This perspective is crucial, taking into account the chaotic political landscape in regions, such as the Sahel, where coups have become a regular occurrence. Moreover, the diversity of chapters provides a clear understanding of the issue. From evaluating the role of foreign military actors⁵ to discussing the challenges of military coups, the book captures the multifaceted nature of modern African politics.⁶ Furthermore, Akinola's editing style provides for a coherent narrative, which allows individual contributors to present their unique perspectives. Additionally, the accessible and engaging writing style, characterised by clear language and relatable examples, enhances readability. By avoiding overly technical jargon and presenting information in a straightforward manner, the book invites a broad audience to engage with its important themes, making the analysis of military coups and democratic decline approachable and compelling.

The book, however, lacks an in-depth criticism on the role of international actors in sustaining authoritarian rule and military juntas. The book could benefit from a more extensive consideration of international actors' complicity in enabling authoritarian regimes and military juntas. Despite the identification in the book of some foreign influences, a deeper exploration of this area could further illuminate how external powers shape the internal politics of African states.

Akinola's book contributes to the broad literature on coups and political transitions in Africa by offering contemporary analysis and case studies that represent the current state of affairs on the continent, such as Zimbabwe, Mali, and Burkina Faso. The book serves as both a historical account and a guide for future research, emphasising the need to address issues of underlying governance that result in military interventions. This publication

holds significant implications for further study in the field of African governance. By emphasising the intersection of local grievances and military actions, it motivates scholars to explore the causal relationships between governance structures and coup outcomes. The call for measuring democratic performance not only during elections but also extending the accountability and effectiveness of governance practices is particularly pertinent for future research.

Scholars and students of African studies, political science, and international relations are the intended audience for this volume. Additionally, policymakers and practitioners working on governance and security in Africa will find the insights helpful in understanding the dynamics contributing to political instability. The balanced structure of the book merges rigorous academic scrutiny with concrete implications, making it suitable for both scholars and policymakers interested in African governance.

In conclusion, *The Resurgence of Military Coups and Democratic Relapse in Africa* is a crucial contribution to contemporary discussions surrounding governance in Africa. Adeoye Akinola and the contributing authors present a compelling analysis of the causes and implications of coups while challenging readers to rethink the narratives surrounding military interventions. The book is not only informative but also serves as a clarion call for a fresh assessment of what democracy means in the African context, highlighting the need for deeper engagement with the underlying issues.

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Book Review

When Rambo Meets the Red Cross: Civil–Military Engagement in Fragile States

Stanislava P Mladenova

Lanham: Rowman & Littlefield
2024, 206 pages
ISBN 978-1-5381-8772-2

When Rambo Meets the Red Cross: Civil–Military Engagement in Fragile States, written by Stanislava Mladenova, is a must-read for anyone working in the civil–military space, particularly those working with the United States (US) military. Mladenova’s analysis offers an in-depth analysis on whether US special operations forces (USSOFs) and non-governmental organisations (NGOs) can be effective partners in low-intensity conflict.¹ The work comes as the result of Mladenova’s professional experience and is the result of her academic studies at King’s College London. The book expertly straddles the pragmatic and academic line to provide a first of its kind review of the shared interests between USSOFs and NGOs.

The intent of the book is to focus on how USSOFs and NGOs may collaborate when working in the same areas.² The book accomplishes its intent through semi-structured interviews with US military, NGO staff, local populations, and a host-nation government official. In total, Mladenova interviewed 42 US military personnel, 28 NGO staff, 16 population respondents, and one host-nation government official.³

The book has four main strengths. First, the book is easily readable while maintaining academic rigour. It effectively communicates complex concepts in a clear, concise manner. The book is divided into six substantive chapters with clear purpose and audience for each chapter that builds into the next. The military chapter is written as a way for an NGO worker to “meet” Rambo, unravelling the complex mission and nature of the warrior. The NGO chapter helps readers “meet” the Red Cross, helping military staff understand the complexity and diversity of NGOs and their staff. Yet, the book is suitable for both of these audiences, as its themes analyse the role and organisation of USSOF Civil Affairs (CA), the role and organisational structure of NGOs (showing where USSOFs and NGOs have opportunities towards collaborating with one another) as well as effective interactions between USSOFs and NGOs, and local perceptions of each. Second, the book provides a global perspective. The interviews are not limited to one continent or area. While focused predominately on the US military, it pulls in US military efforts and experiences from across the globe. Third, the book provides a detailed perspective from USSOF. The focus is primarily civil–military engagement, which is conducted by USSOF CA; however, it includes perspectives from special forces and psychological operations forces. Fourth,

within this group of USSOFs, the number of interviews provides for nuance while allowing common themes across the interviews. Mladenova expertly highlights the threads between interviews to show where commonalities exist.

The main argument in *When Rambo Meets the Red Cross* is that the USSOFs and NGOs can be effective partners, and there is momentum for them to partner. Mladenova dispels the myth that the military is always the hard power while NGOs are soft power. Each side has much to teach the other, and has a growing role in the hard and soft power divide. When USSOFs and NGOs collaborate, local communities see a “softening” of USSOFs and a “hardening” of NGOs. Further, Mladenova finds that local communities care more about the utility of what is provided than about who is providing the assistance. Interpersonal skills, respect for local culture, the ability to listen, and understanding local context are key for both USSOFs and NGOs to engage local communities effectively. The ability of actors to incorporate these key items is determinative in whether communities see USSOFs or NGOs in a positive or negative light.

No book is perfect, and this book is no exception, despite its numerous strengths. There are four main shortcomings of this book that could be the subject for future analysis. First, the book focuses almost entirely at the tactical, or implementation side of both the military and NGO efforts. It does not address the policies that lead to USSOFs and NGOs being in the same area, or the strategic implications of any collaboration. Second, the book focuses most heavily on the military side. The majority of the interviews conducted were with USSOF personnel, with fewer interviews involving NGOs respondents. Third, the book is exclusive to the United States and does not refer to other countries that may be involved in the same communities or elsewhere. Lastly, the book focuses on USSOF CA even though the overwhelming majority of US CA forces are outside the special operations umbrella, and in the US Army Reserves.

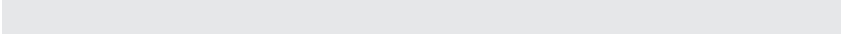
The implications from this book are for professionals engaged in the civil–military space. Maldenova demonstrates that USSOFs and NGOs can be effective partners in low-intensity conflict. The onus is now on practitioners to capitalise on this finding. Each actor has relative strengths and weaknesses, as Maldenova identifies. Practitioners from the military, development and humanitarian sides should apply the findings from this work to identify how their organisation could adapt to the changing space in which they are all operating.

This book is intended for practitioners. Anyone engaged in the civil–military space, particularly when the “military” is the US military, could benefit from this book. The book will inform and challenge readers from both the military and humanitarian sides. There are noteworthy lessons for non-US readers, and the book offers valuable insights for other militaries, multinational coalitions, and international organisations. While not a primary target audience for the book, policy advisors and academics could benefit from its insights. Policy advisors and programme officers may have preconceived notions or assumptions challenged. This book may therefore help them devise new policies or programmes that would achieve their goals better. Academics could benefit from the book by helping to fill the unaddressed gaps.

In summary, *When Rambo Meets the Red Cross* offers quality insights into how USSOFs and NGOs work together in low-intensity conflict spaces. Mladenova achieved her objective of displaying effectively and persuasively how USSOFs and NGOs could collaborate in low-intensity conflict. It should be read by those working in areas where military and humanitarian actors may work together. I found the book to be insightful, approachable, thorough, and clear.⁴

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Endnotes

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Book Review

Super President: The History and Future of Executive Power in South Africa

Bhaso Ndzendze

Johannesburg: UJ Press
2024, 240 pages
ISBN 978-1-7764-9001-1

Bhaso Ndzendze describes South Africa as a country that is ‘either ... in stagnation, crisis or even decline.’¹ This negative but warranted characterisation of the contemporary South African (SA) political landscape is the motive for his well-researched book, *Super President: The History and Future of Executive Power in South Africa*.

The title illustrates the author’s view that “super presidents” (political leaders who had ministerial experience before they led cabinets, and assumed ministerial roles while serving as prime minister or president) characterised the executive political leadership¹ in South Africa before 1994, and his belief that the same can be true for future executive political leaders in South Africa. For Ndzendze, the post-1994 ‘presidents without portfolio,’² from Nelson Mandela through to the current incumbent, Cyril Ramaphosa, occupy the time between the SA past and the kind of future for which he advocates. According to Ndzendze, these presidents could and should have, but failed to exploit the power at their disposal to pursue the realisation of the potential of South Africa fully.

With his knowledge of and insights into historical and contemporary examples from home and abroad, Ndzendze assesses the executive political leadership in South Africa after 1994 with a view to shaping a different kind of leadership for the future. For the author, leadership, and more specifically, the post-1994 presidential leadership in South Africa, sits at the heart of the ‘stagnation, crisis or ... decline’ in the country.³

Ndzendze outlines four broad reasons scholars and commentators have given over the last three decades for why SA presidents ‘have ... fallen short of their ... commitments to the nation’⁴. Firstly, their ANC comrades prevented them from leading effectively.⁵ Secondly, their commitment to ‘leading and affecting policy’ is questionable because they were ‘aloof’, ‘undereducated’, or more ‘committed to their own power and self-enrichment’ than they were to ‘the discharge of their duties’.⁶ Thirdly, they were leading a party that has a ‘poor grasp of statecraft’, and finally, ‘the challenges [are] so vast – and

¹ “Throughout this review, the terms “executive political leadership” or “leaders” refer specifically to the offices of prime minister and/or president.

² “Whether it is accurate to say that all SA presidents after 1994 had ‘commitments to the nation’, meaning each president was sincerely invested in promoting the collective good, is questionable. It would have been more appropriate if the author had referred to the presidents’ “constitutional mandates”.

the apartheid inheritance so stubborn – that there is no hope of a single administration undoing centuries of selective development.⁷

Ndzendze criticises these historical explanations for failing to point to what he calls ‘a cross-cutting structural solution.’⁸ *Super Presidents* advances what Ndzendze believes to be such a solution, as he argues that, ‘to affect change and institute transparent and effective [political] leadership, SA presidents,³ regardless of [political] party, should assume ministerial positions within their own cabinets.’⁹ Ndzendze goes so far as to advance this argument as ‘the remedy’ for South Africa.¹⁰ How precisely having a president assume ministerial leadership positions, alone, remedies the post-1994 challenges cited in the preceding paragraph, some of which inhibit democratic governance, is unclear.

Ndzendze makes three observations or arguments in support of his proposal that SA presidents after 1994 adopt ministerial leadership positions. Firstly, their predecessors did so – and they did so effectively. Secondly, there are states in the contemporary world that Ndzendze believes are comparable to and more complex than South Africa, in which former (in the case of Canada and Nigeria) or existing (in the case of India and Nigeria) executive political leaders have served or still serve as ministers. Thirdly and finally, Ndzendze argues that the SA Constitution allows the president to play such a dual leadership role.¹¹

To communicate and structure his arguments in support of his proposal, the author divides the book into three parts. In the first, ‘President without Portfolio’ (Chapters 1–5), Ndzendze presents his problem statement. He describes and assesses SA presidencies after 1994 to a degree that supports the central argument in his book. He points to the problem underlying the ‘stagnation, crisis or ... decline’¹² in and of South Africa, namely the failure by SA presidents after 1994 to heed the lessons of their predecessors, and to take up ministry leadership positions in their cabinets. Furthermore, according to Ndzendze, it has not helped that these same presidents, unlike their predecessors, had no prior ministerial experience – a truth that cannot be separated from the SA apartheid past, especially as far as it concerns SA administration immediately after 1994.

In the second part of the book, ‘Super Precedent’ (Chapters 6–9), Ndzendze draws on three sources to help make his case: historical executive leadership examples from the Union of South Africa (1910–1961) and the Republic of South Africa (beginning in 1961); contemporary foreign executive leadership examples from India, Nigeria, and Canada; and finally, ‘the oldest ongoing presidency in the world, the United States [of America].’¹³

Altogether, Ndzendze believes these sources help shape a model for ‘how presidential power should be used in South Africa.’¹⁴ He refers to each example above as a “super precedent” because, according to him, the examples all set a standard for what the future

³ Of interest, Ndzendze’s proposal concerning SA presidents after 1994 is as applicable to SA deputy presidents who, he argues, have played largely ceremonial or peripheral roles in the SA political leadership after 1994 (with the possible exception of Thabo Mbeki). According to the SA Constitution, deputy presidents must fulfil the duties of the president when the latter is absent or unable to do so, and they must also assist the president in the execution of his functions.

of executive power in South Africa should look like. If ‘Presidents without Portfolio’¹⁵ (Part 1) is Ndzendze’s problem statement, and essential to understanding the failure of SA presidents after 1994 to fulfil their so-called ‘commitments to the nation’¹⁶ and the resulting political and socio-economic problems of the country – then ‘Super Precedent’¹⁷ (Part 2) is the proposed solution. Part 2 informs and shapes a model that will make for “super presidents” to the degree that the incumbent South African president and future SA presidents apply the model to their executive political leadership.

Having described and assessed SA ‘presidents without portfolio’¹⁸ after 1994 in Part 1 of the book and presented the reader with historical, South African, and more recent, foreign examples of executive political leadership that set a ‘super precedent’,¹⁹ Ndzendze concludes his book in Part 3. Here, he points to the ‘super possibilities’²⁰ for the future of executive power in South Africa.

In the first instance, he argues in Chapter 10 that it is possible for the ‘super precedent’²¹ to be followed because the SA Constitution does not prevent the president from taking up a ministerial position. In the second instance, he recommends, in Chapter 11, ‘which portfolios future presidents ... should and should not consider.’²² Drawing on the American experience, he specifically advises future SA presidents against leading foreign affairs because giving domestic governance the necessary attention is a prerequisite for effective foreign policy formulation and execution.

Among the advantages that Ndzendze lists for a South African president occupying a ministerial position are ‘more realistic target setting’, ‘more thoughtful decision-making’, the accumulation of ‘*direct* experience on a portfolio’ [original emphasis], and increased agility.²³ It is questionable whether these potential advantages would be achievable or whether they would result in the attainment of any significant and sustainable collective or national value if the president in question lacked competence or ethics, or both.

Democracy, something to which Ndzendze fails to give sufficient attention in his book, depends on democratic leadership *and* citizenship. Ndzendze’s exclusive focus on presidential authority and power (first evident when he introduces the notion of presidents as ‘saviours and helpers’ on page 1 of his book)²⁴ leaves no room for considering the cultures, worldviews and actions of eligible voters in South Africa who possess the constitutionally ordained power to decide who the presidents of their country will be.

Whatever the counterarguments to Ndzendze’s proposal in *Super President* might be, the author’s inquiry into and commentary on the use of presidential power in South Africa nevertheless make a valuable and timely contribution to the study and practice of political leadership in South Africa after 1994. The book offers value, if only because it adds to ongoing discussions about what has been and still is wrong with political leadership in post-1994 South Africa, and why, and the debates about how to bring about positive change.

The book is timely because the author discusses, in part, the historical and contemporary relations between South African presidents and their cabinet ministers. There is no denying that these relations require urgent rearrangement and improvement in present-day South

Africa. Furthermore, the author writes about the interaction between SA presidents and their ministers, and the president's power relative to his cabinet and its ministries, more specifically, at a time when South Africa is governed by its second and potentially more contentious Government of National Unity (GNU).

Part of the value of Ndzendze's book lies in the author's willingness to acknowledge and study history, and then to teach that history to readers as a way of shaping our understanding of the present and what the future could look like. In Ndzendze's words, 'History can serve as a prologue, warning us about what to avoid ... The past is also a revelation of possibility and human capability, for both good and bad.'²⁵ In making the case for SA presidents after 1994 to take up ministerial positions, Ndzendze draws firstly on the SA political history before 1994 and, more specifically, on the prime ministers and presidents that formed part of the group he refers to as "super precedents" and "super presidents".

South Africans (individually and collectively) have not dealt sufficiently with the historical responsibility for and trauma resulting from racialised civil governance.²⁶ Consequently, racial tensions and divisions continue to characterise the SA social and political relations.²⁷ Considering these realities, the author's willingness to cite SA executive political leaders before 1994 as examples for the SA presidents after 1994 is bold, courageous, and refreshing, even if the examples have not left this reviewer convinced of the author's thesis.

Even though Ndzendze cites the examples from a purely professional (not a moral) perspective, he, knowingly or not, teaches or reminds readers – especially from South Africa – about the potential to draw positive leadership examples from a racially oppressive leadership. Ndzendze's book points to the failure of SA governments after 1994, beginning with the first, to recognise this potential and to ask what could be learned from SA political leaders before 1994, and which cultural or professional modes could be retained from the previous dispensation to make for a more secure, prosperous and peaceful South Africa.

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Book Review

The Shadow State: Why Babita Deokaran Had to Die

Jeff Wicks

Cape Town: Tafelberg
2025, 256 pages
ISBN 978-0-6240-9494-4

What occasioned me to purchase *The Shadow State: Why Babita Deokaran Had to Die*¹ was the phrase ‘shadow state’ in the title. The phrase was popularised by William Reno in his various publications on private militias, endemic corruption, and African strongmen in West Africa.² More specifically, a shadow state refers to –

[A] system of governance in which a form of parallel government is established by a coalition of domestic leaders, local intermediaries, and foreign companies, such that the formal apparatus of the state is not where real power lies. The shadow state is characterized by the presence of private armies, the corrupt distribution of state contracts, and the centrality of private personal networks’.³

Having taught modules on shadow states and what it portends for the future, I was horrified that such a phrase would be used to describe South Africa. After reading this riveting book by News24 investigative journalist Jeff Wicks, I cannot but agree with his conclusion that South Africa is a shadow state. Such a position is reinforced by scholars, such as Prof. Andre Duvenhage, who worryingly argues that South Africa has become a ‘mafia state’ where one cannot differentiate between criminal and political elites.⁴ It is precisely this nexus between organised crime syndicates and politicians that is explored by Jeff Wicks against the background of the murder of Babita Deokaran.

The book tells two interconnected stories. The first is the story of a hardworking single mother – Babita Deokaran. She was the chief accountant at the Gauteng Department of Health. Wicks provides a moving account of Deokaran’s life, her values, and her heroism in taking a principled stance against corruption. On 23 August 2021, Deokaran was brutally gunned down. Twelve bullets pierced her body shortly after she had dropped her daughter at school. In asking the question why she had to be killed, Wicks’ second story begins. What follows is a jaw-dropping exposé of corrupt officials, African National Congress (ANC) politicians and extraction syndicates, as they siphoned off billions meant for the most vulnerable patients seeking assistance from public hospitals in South Africa.⁵

The Gauteng Department of Health budget of R66 billion is the largest provincial department in South Africa.⁶ Little wonder, then, that it was the target of various criminal syndicates. Deokaran became especially suspicious of the procurement office at the Tembisa Provincial Tertiary Hospital, where the entire value chain of state procurement

had been captured. Following a deep dive into its purchases, she became aware that this single hospital was swallowing up the lion's share of the entire Gauteng Department of Health. Between April and July 2021, there were 2 454 individual transactions worth a staggering R843 266 937. What was especially suspicious was that all the contracts were valued just under R500 000, which necessitated securing only three quotes. Passing the R500 000 threshold, however, requires a more comprehensive tender process. On 3 August 2021, weeks before her death, Deokaran stopped contracts worth R104 million from being paid, and urged for an investigation into almost R1 billion already paid out.

She was well aware that “closing the taps” might well result in dire consequences. A week before her death, Deokaran sent an urgent WhatsApp message to her immediate superior, Lerato Madyo. At the time, Madyo was the chief financial officer of the Gauteng Department of Health. The message read, ‘Morning CFO, I am just worried that the guys in Tembisa are going to realise we are not releasing their payments and know that we are onto something. Our lives could be in danger.’⁷

Jeff Wicks’ painstaking investigation exposes the systemic abuse of public funds ‘and the networks of patronage linking civil servants – often abetted or coerced by their political principals drawn from the rank and file of the ANC’.⁸ These networks found their way into the highest office in the land.⁹ For instance, a R125 million tender was awarded to a company called Royal Bhaca Projects. Its sole director was Chief Madzikane II Thandisizwe Diko who was married to Khusela Diko, President Ramaphosa’s spokesperson. Meanwhile, cousins Hangwanei Morgan Maumela and Aluwani Maumela’s scores of companies managed to secure R35 965 699 in contracts. One third of the funds that Deokaran had stopped just before her death was destined for these companies. It subsequently became known that the Maumelas were family of President Ramaphosa.

The ability of the justice system to cope effectively with the threat posed by the country developing into a shadow state is seriously doubted. Wicks demonstrates how shoddy the Hawks’ investigation into Deokaran’s murder was.¹⁰ The investigating office did not pursue the paymaster who hired the six assassins. Moreover, the investigating officer also did not pursue valuable evidence when presented, and ordered the release of Khanyisani Mpungose, the alleged gunman. Mpungose was subsequently killed shortly after he was released. This begs the question of why these gross failures occurred in the investigation.

For this book, Wicks was both forensic investigator and investigative journalist – following the money trail from both the hitmen who assassinated Deokaran, and the money leaving Gauteng hospitals. While Wicks’ research was thorough and meticulous, there are shortcomings, since the broader strategic picture is left out. A brief perusal of many of Wicks’ sources shows that many of the sources were newspapers articles. The broader tapestry in which this systemic looting occurred would have been brought to the fore had the author also consulted with available literature on the subject. Books, such as those by Pieter Louis Myburgh, *The Republic of Gupta: A Story of State Capture*, as well as *Gangster State: Unravelling Ace Magashule’s Web of Capture*,¹¹ would have lent a comparative dimension to *The Shadow State* allowing Wicks to examine the trends in the looting of state coffers. Other books, such as *Shadow State: The Politics of State*

Capture by Chipkin and Swilling,¹² would have enriched the discussion in terms of the interface between organised crime syndicates and political class.

Wicks' account is a wake-up call for all South Africans, and exposes the shadow state in all its brutal ugliness. What is clear from Wicks' account, is that there never was a "new dawn" following the looting during the Zuma years. State capture never stopped – there were just "new pigs at the trough". In the years after apartheid, South Africa has morphed into a shadow or mafia state. *The Shadow State: Why Babita Deokaran Had to Die* turned out to be the best book I have read in years. I would highly recommend this book for policymakers, business leaders, academics and the general public concerned about the direction of the country.

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Book Review

South Africa's High-stress Security Environment: Keys to Coping

Gerhard Schoeman

Pretoria: UNISA Press
2023, 106 pages
ISBN 978-1-7761-5183-7

Gerhard Schoeman, an experienced industrial psychologist, draws from his extensive South African National Defence Force (SANDF) background to author *South Africa's High-stress Security Environment: Keys to Coping*. His work in selecting and training personnel for high-stress roles is evident in his thorough exploration of stress management within the South African (SA) security industry. Schoeman makes a unique contribution to the security industry in general – and, more specifically, the SA security industry – for various reasons.

The book is well structured and provides practical insights, beginning with a comprehensive contextualisation of the security industry in South Africa, emphasising the stress to which employees in this environment are exposed. Schoeman effectively explains the nature of stress and its effect on individuals within the security sector, and offers strategies for coping. The detailed chapters on understanding stress and coping mechanisms are particularly valuable for academics and practitioners. The author then focuses on the individual exposed to stress by referring to coping and the key to dealing with stress, which is to know oneself. Schoeman next informs the reader about a person's psychological resources and how these assist with coping. He suggests a model for stress, particularly for the security industry, and concludes the book with a last word on stress and the way forward.

When looking more closely at the content, Chapters 1 to 3 contextualise the book within the SA security industry, which has to fill the void left by the inability of the South African Police Service to cover all risks, dangers and threats. The dangerous environment in which security officers in South Africa work is well described, and shocking SA crime statistics are presented. The powerlessness of the current justice system to deter criminals is criticised, which supports the importance of the security officer coping in this environment, as lives depend on their ability to cope. Within this context, Schoeman emphasises that the ability of security officers to use healthy coping mechanisms under these high-stress situations is essential for the safety of their colleagues and clients. For security officers, their work environment is a "battlefield",¹ and mention is made of all the efforts security companies make to implement wellness programmes and look after the well-being of their employees.

Furthermore, the book includes a comprehensive review of various security occupations such as VIP protectors, cash-in-transit guards, armed response, and security guards, effectively situating the discussion within the broader context of occupational stress research. The author provides fascinating information on the contribution the security industry makes to economic growth in SA, the third largest employer that grows at a rate of 30 per cent per year, and protects assets and financial resources worth hundreds of billions of rands.² Interestingly, Schoeman states that the security industry is larger than the South African Police Service. BusinessTech reported in 2019, that there are 2,5 security officers for each policeman in South Africa.³

The above is followed by a thorough and logically organised literature review covered by Chapters 4–7, focusing on understanding stress by defining it, contextualising it to the physically and psychologically demanding security industry. Schoeman discusses how stress affects security officers, explaining how to deal with stress, and finally discusses what personality dimensions enhance coping, with an emphasis on self-knowledge. Interestingly, the author emphasises that managing stress is not about avoiding it. A minor criticism, however, is that the book is, in this instance, aimed towards academics rather than towards laypeople. Despite the criticism, there is ample reading for the reader who wants to explore the phenomenon, and a comprehensive list of references that could be used for further exploration.

Stress in the security environment has always been a reality of life. Since the early 1990s, this type of stress has started affecting people in the workplace more significantly than ever before.⁴ Schoeman prefers Weiten's definition of stress as any circumstances that threaten or are perceived to threaten a person's well-being, thereby exceeding the person's ability to cope.⁵ The threat may be immediate physical safety, self-esteem, reputation, peace of mind, or anything a person values. Furthermore, Schoeman contextually describes stress as emanating from a dangerous working environment where people fear for their lives because of high crime rates, and where it is difficult to cope with the situations to which employees are exposed. The author presents several key stress management and coping models from the psychology literature, setting the stage for his stress management model in high-risk environments. After reviewing the various models, he identifies four main themes of stress and coping models from the literature review:

- Stress is a complex and dynamic process that changes over time;
- Both individual and environmental sources for stress exist;
- There is an appraisal process that influences how people cope with stress; and
- There are consequences to stress that influence both the individual and the organisation for which they work.

Schoeman emphasises the importance of understanding the causes of stress before attempting to manage it. In the absence of high-risk security environment literature – which also confirms the gap in the literature that the book intended to address – the author leaned heavily on research done in the police and military in South Africa, which are closely related to the security environment and are also high-risk environments. For some

readers, such as practitioners who want to solve a practical problem in the workplace, the literature on high-risk occupations can be a bit tedious. Academics, however, will value the information and will probably want to explore the literature further. The author manages to draw the reader into the world of the security employee to give them understanding and empathy when he refers to Burgess, who quoted a cash-in-transit guard: ‘Once you have been in one of these attacks [cash-and-transit attacks], you operate in this constant state of hyper vigilance. Nothing is ever green – it’s always orange and red. You become twitchy, jumpy and trigger happy’ [*sic*].⁶ This emphasises the chronic nature of stress in a high-risk environment, and one then understands the staff turnover of about 200 per cent, to which the author refers.⁷

The importance of coping is evident when Schoeman spends three chapters (Chapters 6–8) on this theme before presenting his suggested model for coping in a fourth chapter (Chapter 9). The author provides an exciting chapter on coping (Chapter 6), which offers fascinating insights, especially regarding defence mechanisms and healthy and unhealthy coping strategies. Schoeman emphasises the extent of coping, and argues that it is not a once-off process but a set of responses over time, influenced by the demands, resources and constraints of both the person and the environment. He also explains how he compiled the dimensions for his coping questionnaire as described in Chapter 9. The general chapter on coping (Chapter 6) is followed by a chapter on personality and coping, emphasising the importance of self-knowledge in dealing with stress effectively. Schoeman suggests that coping should be redefined as a process to self-regulate a person’s personality in stressful situations based on their goals, needs and feelings. People will therefore have coping preferences for different situations, manifesting as an extension of their personality traits and how they appraise stressful events.

Moreover, Schoeman discusses the role of psychological resources, such as locus of control, self-efficacy, self-esteem, sense of coherence, resilience, and courage, which can be helpful when coping with high-level stressors. Although the author indicates that he did not include it in his development of a model to manage stress, it was still interesting to read about it. Exploring these resources further to refine and develop his model will be worthwhile.

Chapter 9 is a cornerstone of the book, presenting a practical model for coping with stress in the security industry. The model is well articulated and supported by theoretical and empirical evidence, making it a valuable tool for practitioners. The book offers understandable figures to explain complex issues. On top of that, Schoeman gives a brief overview of how he developed a coping questionnaire scientifically and statistically that can indicate how a person copes with stress. He shares his interesting findings that all people – regardless of gender, age or work experience – experience stress the same way. After investigating the relationship between coping and personality he developed a very comprehensive model for dealing with stress consisting of four components: a stressor, appraisal of the stressor, coping strategies that may be either healthy or unhealthy, and positive outcomes when coping effectively (or negative consequences when not coping effectively). The exposed person’s personality probably influences the appraisal and choice of coping. Much detail is provided in the model, and this is comprehensively

described by Schoeman. The value of this model lies in it being easy to understand. Some elements had been tested statistically, and others were derived from theory. The model also provides examples of healthy and unhealthy coping strategies, and can thus guide an affected person to opt for healthy strategies to cope with exposure to a highly stressful event. Because it is represented visually as a simplified model contributes to a good understanding, making it easy for security companies, as employers, to understand the effect of the work on their employees. The model can also assist in developing a customised wellness programme and an employee assistance programme, which may include targeted interventions.

It is, however, worth noting that the font size used throughout the book is relatively small. While this may pose a slight challenge to some readers, the richness of the content and quality of the arguments presented far outweigh this minor inconvenience. Readers prepared to overlook this aspect will be greatly rewarded with a wealth of knowledge and a deep understanding of coping with stress in the SA security environment. In conclusion, despite the smaller font size (which might be negated if one buys an electronic version of the book), *South Africa's High-stress Security Environment: Keys to Coping* provides invaluable insights into stress management in high-risk environments. Its scholarly rigour and practical applications make it a must-read for academics and practitioners in the field. What is also of value is that the final chapter (Chapter 10) provides helpful tips for employers and individuals, and recommendations are made for the security industry. These recommendations and tips include creating awareness, arranging wellness days, enhancing training, and doing research, to name a few. This book is a resource for all security stakeholders and can be recontextualised to other stressful environments. As Faan du Toit, the chief executive officer of Omega Risk Solutions, states in the foreword, 'this book is welcomed and long overdue.'⁸

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Endnotes

- ¹ G Schoeman, *South Africa's High-stress Security Environment: Keys to Coping* (Pretoria: UNISA Press, 2023), 14.
- ² Kole (2015) and Minnaar (2005), as cited in Schoeman, *South Africa's High-stress Security Environment*, 14.
- ³ Businesstech, 'The Number of Police Officers vs Security Guards in South Africa', 13 July 2019, <https://businesstech.co.za/news/government/325093/the-number-of-police-officers-vs-security-guards-in-south-africa/> [Accessed on 14 October 2025].
- ⁴ Schoeman, *South Africa's High-stress Security Environment*, 21.
- ⁵ W Weiten, *Psychology: Themes and Variations*, 9th ed. (Belmont: Cengage Learning, 2014), 554.
- ⁶ Schoeman, *South Africa's High-stress Security Environment*, 44.
- ⁷ Schoeman, *South Africa's High-stress Security Environment*, 47.
- ⁸ Schoeman, *South Africa's High-stress Security Environment*, xiii.

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