

Version 1.0 | Last updated 08 January 2017

Pre-war Military Planning and War Aims (Union of South Africa)

By [David Brock Katz](#)

The Union of South Africa was formed ten years after the internecine Second Anglo-Boer war (1899-1902) from which the British Empire emerged victorious. Afrikaner-English acrimony was an especially powerful element in the formation of the Union in 1910 and the Union Defence Force (UDF) in 1912. The formation of the UDF was overwhelmingly perceived as a threat, a force designed to deal with internal strife rather than an external threat. When the First World War broke out, the UDF found itself without a strategic plan for the defence of the Union and was ill-prepared to meet the demands of European warfare.

Table of Contents

- [1 Introduction](#)
- [2 South Africa's Threat Perception](#)
- [3 South African Expansionism and Sub-Imperialism as a War Aim](#)
- [4 The Formation of the Union Defence Force](#)
- [5 Conclusion](#)
- [Notes](#)
- [Selected Bibliography](#)
- [Citation](#)

Introduction

Oh! That Defence Force of yours, how often I wrote to you that it would lead to trouble and that if you had it you would not stop at defence, but begin to invade, and so it is.^[1]

The [Union of South Africa](#) was formed four years prior to the outbreak of the First World War on the

31 May 1910, eight years after the demise of the Boer republics. Minister of Defence Jan Smuts (1870-1950) founded the UDF in 1912. The formation of the Union was an exercise in compromise and conciliation, bringing together former implacable enemies within a unitary state. Likewise, the formation of the UDF involved a delicate process of amalgamation and military transformation.^[2] Many Afrikaners barely suppressed their resentment over the loss of independence of their two Boer republics. Devastation to the countryside, coupled with the thousands of Boer women and children who perished in the British concentration camps, added fuel to the fires of Afrikaner nationalism. The need to placate bitterness and build a country that met the aspirations of both English and Afrikaner shaped the decisions surrounding the formation of the Union and its defence force.^[3] A further troubling dimension to the conflict bubbling under the political surface of the newly formed Union was how to deal with the disenfranchised black majority.

The black majority was also resentful, since they had been sidelined first in the Treaty of Vereeniging and then again in the South Africa Act 1909 where the British promised to improve their conditions in return for their support in the war effort against the Boers. To the increasing alarm of white South Africans, black dissatisfaction often took the form of sporadic labour strikes and even instances of rebellion, such as the Bambatha Rebellion of 1906.^[4] A pamphlet published by Colonel Henry Timson Lukin (1860-1925) describing tactics in the event of disturbances confirms that the threat perception was focused mainly on internal strife, especially that emanating from a black source.^[5]

Lukin was the Commandant-General of the Cape Colonial Forces and as such played an important role in the defence conferences that took place in 1907, 1908, and 1909 prior to the formation of the Union.^[6] These conferences joined the Cape, Orange Free State, Transvaal, and Natal Colonies in a quest to find inter-colonial military cooperation and eventually facilitated the formation of the UDF.^[7] A picture emerges of a politically troubled entity that had a tendency, if not a need, to be inward looking and a predisposition towards solving internal problems before dabbling in foreign adventures.^[8] The formation of the UDF in 1912 was a reflection of the prevailing insecurities in the Union.^[9] The need for conciliation led to compromise and the maintenance of unity often took precedence over the more prudent measures needed to establish an effective defence force.^[10]

South Africa's Threat Perception

South Africa perceived three possible military threats to its integrity. The first possible threat was a seaward assault in which a major European power threatened one or more of South Africa's ports. However, South Africa's importance as a strategic sea route had diminished with the opening of the Suez Canal in 1869. Consequently, South Africa made annual cash payments towards the cost of maintaining the Royal Navy for naval protection to protect against such a threat.

The second possible threat was of a landward invasion by a European power, especially one that maintained an African army. The Belgians, Germans, and Portuguese all maintained armies in their

territories and used Africans as their main source of troops while upper echelons of the armies were white. The German and Portuguese colonies were adjacent to South Africa and therefore posed more of an immediate threat. The unforgiving terrain of the border areas and especially the desert on the German South-West African border ensured that a successful landward offence was not only an extremely difficult enterprise but also unlikely.^[11]

The third, and most likely threat to the military integrity of South Africa, was that of internal unrest. If this threat materialised in conjunction with a landward invasion, a seaward invasion, or both, the consequences would be all the more dire. An internal threat would have the effect of dispersing forces, while meeting a conventional enemy invader would require the opposite of a concentration of forces. The combination of a simultaneous internal and external threat would thus stretch the UDF beyond its capability.^[12]

South African Expansionism and Sub-Imperialism as a War Aim

Expansionism was a pre-existing policy long before the creation of the Union in 1910. The Portuguese were the first to recognise the British occupation of the Cape of Good Hope in 1795 as a prelude to rapid British expansion and a threat to Portuguese holdings in Africa.^[13] The desire to acquire additional territory transcended the political divide. Englishman and Afrikaner alike harboured deep-seated desires to extend their hegemony northwards, under the banner of either imperialism or nationalism. One of the main objectives of the newly formed and united South Africa was to consolidate these disparate expansionist dreams.^[14]

A secret memorandum drawn up during the First World War revealed that Smuts's ambitions extended even further than the Kunene and Zambesi rivers. Beside the incorporation of Rhodesia and German South West Africa (GSWA), he proposed that the northern boundary of "the greater Union" would encompass most of Angola and part of southern Katanga. Smuts saw this dream as "a practical certainty" which ought to have been "one of the cardinal points of British Imperial policy". His territorial ambition was only slightly less than that of Rhodes before him.^[15]

Smuts's true intentions on invading German East Africa are adequately expressed in a letter dated August 1915 to John Xavier Merriman (1841-1926), the former Prime Minister of the Cape Colony. He intimated that German East Africa could be exchanged for Mozambique so as to consolidate South African territory south of the Kunene and Zambesi.^[16] In 1915 the Colonial Secretary, Lewis Harcourt (1863-1922), touted the idea of exchanging GSWA for Mozambique with the Portuguese. Smuts turned down the proposal by preferring to exchange large swathes of German East Africa for Mozambique.^[17]

The Formation of the Union Defence Force

When the Union came into being on 31 May 1910 there was a general consensus that South Africa would need to form its own defence force. 3,500 Imperial troops garrisoned South Africa, but they would be withdrawn in the event of a European war, and three colonial organisations namely, the Transvaal volunteers, the Cape Colonial Forces and the Natal Militia were also stationed in South Africa.^[18] The UDF owes much to its chief architect and the Union's first Minister of Defence, Jan Smuts. He was determined to create a modern defence force based on Western methods. Two people greatly influenced the committee that prepared the South African Defence Bill: Paul Sanford Methuen, Lord Methuen (1846-1932), the commander of the military forces in South Africa, and Lukin, who proposed a Swiss style military system where all adult males were members of a part-time reserve and could be mobilised quickly when required.^[19]

The motivation behind the formation of the UDF was to enable South Africans to defend their territory against an internal or external threat. The explanatory notes to the first draft of the defence bill indicate underlying fears that the most likely threat would be internal unrest, or "internal dissention", from the black population.^[20] The object of the bill was to ensure that the funds for defence voted by Parliament would be applied the best advantage ensuring a defence force thoroughly proficient in the duties that they had to perform.^[21]

Two distinct military systems existed at the time that the UDF was formed. A significant proportion of Afrikaners wished to perpetuate the Boer Commando military system and an equally significant amount of Englishmen wished to steer the UDF along British military lines. The final product would be an unsatisfactory compromise between these two military traditions.^[22] Hugh Wyndham (1877-1963)^[23] succinctly summed up the situation on 12 December 1914 when he stated:

We have at the present time two entirely different military organizations operating side by side in the field. One is the commando system, which in reality is no system at all, and the other is a somewhat faint copy of the British system. However we are getting along all right.^[24]

When the UDF was eventually established on 1 July 1912 via the Defence Act (No 13 of 1912), it drew its members from two competing language groups and three different military systems based on the Boer, colonial, and British forces.^[25] Posts in the UDF could not be offered on ability alone where, in the interests of nation building, the overriding consideration was of representation. To a large extent there was an equilibrium between Afrikaners and Englishmen for the sake of politics, albeit arguably at the expense of military efficiency.^[26] Brigadier-General H.T. Lukin, the former commander of the Cape Colonial Forces, and the staunchly republican former Boer general, Christiaan F. Beyers (1869-1914) filled the two most important positions. These two men were to create an atmosphere in the UDF that was congenial to both English and Afrikaans-speaking South Africans.^[27] Many high-ranking officers reorganised the armed forces to benefit their political followers. Beyers, for one, removed the more "British" officers from the volunteer regiments of the

Citizen Forces.^[28] The establishment of organisational fiefdoms stunted the UDF's development, as it failed to employ officers with the appropriate military training and education. The UDF remained tied to the British armed forces seeking advice and example in setting up their own institutions. To the chagrin of those who sought a Boer influence, the UDF adopted the uniform, rank structure, and discipline of the British army.

A major shortcoming in the new UDF was the shortage of staff qualified officers. Few senior officers, beside the Prime Minister Louis Botha (1862-1919), had any experience commanding a force more than 300 strong. The same inexperienced leadership now commanded thousands, rather than hundreds, without any real central direction or staff system. Therefore there were no formal arrangements for the supply of troops or replacement of losses and few medical arrangements. No supreme command was allowed for and the Minister of Defence became Commander-in-Chief at the outbreak of war. There was no military Chief of Staff and this position was filled by the civilian head of the Department of the Secretary for Defence, who had no military status whatsoever.^[29]

Those who opposed the Defence Bill rallied around their opposition to so-called militarism and compulsion to serve. The bill was adopted in April 1912 but faced severe opposition from many quarters. The former President of the Orange Free State, Marthinus Theunis Steyn (1857-1916), was concerned that the UDF, together with its cadet system, would create a spirit of militarism and blur the lines between the Imperial forces and the UDF.^[30] Merriman was also concerned with militarism and that South Africa could become involved in situations where she had not been fully consulted. A further concern was that the bill described South Africa as an undefined geographic expression, thereby allowing Smuts to deploy his forces anywhere in Africa south of the equator.^[31]

On the eve of the First World War, South Africa found itself in a position where the UDF had no central staff and little in the way of a proper command organisation. For the most part Smuts and his civilian officials in the Ministry of Defence acted in the place of a proper staff structure, and as a result at the outbreak of the First World War no contingency plans existed for the defence of the Union or the seizure of adjacent German territory.^[32]

Despite a lack of preparation, South Africa was not found wanting at the outbreak of the First World War. Her first military challenge came in the form of an Afrikaner rebellion, when 12,000 Afrikaners rose up against the government.^[33] Martial law was declared on 14 October 1914 and Botha was able to raise and personally lead 32,000 loyal troops, 20,000 of which were Afrikaners, to counter the rebels. The rebellion was quickly suppressed and finally ended when the last of them surrendered in February 1915.

Glaring deficiencies in the area of trained staff officers were somewhat compensated for by Botha and Smuts assuming leadership and warrior roles. South Africa's first attempt to invade GSWA on 26 September 1914 resulted in defeat at the Battle of Sandfontein.^[34] Fortunately, there was no shortage of competent fighting soldiers, a large proportion of whom had fought on both sides of the

Boer war. South Africa's ability to quickly mobilise an army of volunteers, significantly outnumbering the Germans in GSWA, combined with the capable generalship of Botha, proved decisive in overwhelming the enemy.^[35]

Conclusion

The Union of South Africa was formed a mere four years prior to the outbreak of the First World War. The UDF had only been in existence for half that time and its formation reflected the necessity of political expediency over military efficiency. The UDF was formed in the midst of great controversy and strong opposition from Afrikaner Nationalists who resented the Anglicisation of its structures. The UDF was designed around a perception that the most likely threat to its integrity would emanate from an internal uprising of some sort rather than an external source. South Africa was ill prepared for warfare against a European power, even lacking the basics of a defensive plan or a coherent strategy against its neighbouring German colony. However, when war came in the form of an internal rebellion and shortly thereafter, a successful [campaign to conquer German South West Africa](#), the UDF, despite obvious shortcomings, managed to rise to the occasion.

David Brock Katz, University of Stellenbosch

Section Editor: [Timothy J. Stapleton](#)

Notes

1. ↑ van der Poel, Jean and Hancock, Keith. (eds.): Selections From the Smuts Papers June 1910 - November 1918, London 1966, vol. III, p. 206. [Emily Hobhouse \(1860-1926\)](#) in a letter to Smuts expressing her anguish at South Africa's entry into World War One.
2. ↑ van der Waag, Ian: "Military Culture and the South African armed forces, an historical perspective", 2011. A paper presented by Ian van der Waag at the Second South African Conference on Strategic Theory, "On Strategy; Military culture and African armed forces", co-hosted by Stellenbosch University and the Royal Danish Defence College, 22-23 September 2011. The paper deals with the formation of the UDF and the challenges of amalgamation and transformation encountered. Van der Waag describes the newly formed UDF as a "contested space".
3. ↑ Nasson, Bill: Springboks on the Somme, Johannesburg 2007, p. 10. Nasson describes the Union as lacking a full sense of national being "...and an idiom of common citizenship around which to build a consensus of war mobilisation."
4. ↑ Thompson, Paul S.: "The Zulu Rebellion of 1906, The Collusion of Bambatha and Dinuzulu" in: The International Journal of African Historical Studies, 36/3 (2003), pp. 533-557. In the days prior to Union the Natal government was hard-pressed to put down this rebellion and had to call on the forces of the Cape Colony and Transvaal for assistance.

5. ↑ Lukin, Henry Timson: *Savage Warfare; Hints on Tactics to be Adopted and Precautions to be taken*, Cape Town 1906.
6. ↑ Nortier, E.W.: "Major-General Sir Henry Timson Lukin (1860-1925), The making of a South African hero," Masters Thesis, Stellenbosch 2005.
7. ↑ Van der Waag, *Military Culture* 2011, p. 5.
8. ↑ Nasson, *Springboks on the Somme* 2007, p. 11.
9. ↑ Strachan, *Hew: The First World War in Africa*, Oxford 2004, p. 61.
10. ↑ van der Waag, Ian: "Smuts's Generals: Towards a First Portrait of the South African High Command, 1912–1948" in: *War in History*, 18/1 (2011). An insightful background into the "... difficult politico-strategic environment in which the UDF was established in 1912" and deals with some of the appointment issues faced in the fledgling UDF.
11. ↑ van Der Waag, Ian : *Rural struggles and the politics of a colonial command, The Southern Mounted Rifles of the Transvaal Volunteers 1905-1912*, in Miller, Stephen (ed.): *Soldiers and Settlers in Africa 1850-1918*, Leiden 2009.
12. ↑ Van Der Waag, *Rural struggles* 2009, p. 257.
13. ↑ Warhurst, P.R.: *Anglo-Portuguese Relations in South-Central Africa 1890-1900*, London 1962, p. 1.
14. ↑ Hyam, Ronald: *The Failure of South African Expansion, 1908-1948*, London 1972, p. 15.
15. ↑ Smuts, Jan: "Delagoa Bay" (Memorandum, National Archives Pretoria, Jan Smuts Papers Box (4), undated; Smuts, Jan: "Delagoa Bay" (Memorandum, National Archives Pretoria, Jan Smuts Papers Box (5), undated; Katzenellenbogen, Simon: *South Africa and Southern Mozambique: Labour, Railways, and Trade in the Making of a Relationship*, Manchester 1982, pp. 122-123.
16. ↑ Smuts, Jan: "East Africa Exchange" (Memorandum Smuts to Merriman, National Archives Pretoria, Jan Smuts Papers Box 197 (154), August 1915; Van der Waag, Ian: 'All splendid, but horrible: The Politics of South Africa's Second "Little Bit" and the War on the Western Front, 1915-1918', *Scientia Militaria* 40/3 (2012), p. 80.
17. ↑ Yearwood, P.J.: "Great Britain and the Repartition of Africa, 1914-1919", in: *The Journal of Imperial and Commonwealth History*, 18/3 (1990), p. 321; Hyam, *The Failure of South African Expansion* 1972, pp. 27-28, 1972.
18. ↑ Stapleton, Timothy: *A Military History of South Africa*, Santa Barbara 2010, p. 113.
19. ↑ *Ibid.*, p. 114.
20. ↑ van der Poel, Jean (ed.): *Selections From the Smuts Paper*, Cambridge 1966, p. 47. See also Seegers, Annette: *The Military in the making of modern South Africa*, London 1996. The author emphasises the Afrikaner nationalist threat of rebellion.
21. ↑ 'Defence Bill 1912 Explanatory Pamphlet' (Report, National Archives Pretoria, Jan Smuts Papers (Box 111), 1912), p. 1.
22. ↑ Van der Waag, *Smuts's Generals* 2011, p. 36. See also Samson Anne: *World War I in Africa: The Forgotten Conflict Among the European Powers*, London 2013, p. 40.
23. ↑ Van Der Waag, *Rural struggles* 2009, p. 283.
24. ↑ West Sussex Record Office (WSRO), Maxse papers, 455, Hugh Wyndham to Mary Maxse, 9 December 1914.
25. ↑ Forming the UDF required the amalgamation and integration of the Boer Commandos, the Transvaal Volunteers, the Cape Colonial Forces and the Natal Militia.

26. ↑ Van der Waag: Smuts's Generals 2011 p. 40.
27. ↑ Nortier E.W.: "Major General Sir H.T. Lukin, 1861-1925: the making of a South African hero", unpublished MPhil thesis, Stellenbosch University 2005.
28. ↑ For one particular case, that of Hugh Wyndham see Van der Waag, Rural 2009, pp. 251-285.
29. ↑ Collyer, Jack J: The campaign in German South West Africa, 1914-1915, Pretoria 1937, pp. 17-19.
30. ↑ Strachan, The First World War in Africa 2004, pp. 65-66.
31. ↑ Samson World War I in Africa 2013, p. 40.
32. ↑ Collyer, Campaign in German South West Africa 1937, p. 19. See also Strachan, The First World War in Africa 2004, p. 66.
33. ↑ See Retief, L.J.E.: The Rebellion 1914-1915, Honours Thesis, University of Cape Town, Arts, 1959; Scholtz, GD: Die Rebelle 1914-1915, Johannesburg 1942; reprinted, Pretoria 2013; Kemp, JCG: Die Pad van die Veroweraar, Kaapstad 1946; Harm, Oost: Wie is die Skuldige?, Johannesburg 1956; Schoor, MCE van: Generaal JCG Kemp en die epiese woestyntog, Pretoria 2006.
34. ↑ See Warwick Rodney: Reconsideration of the Battle of Sandfontein, The First Phase of the German South West Africa Campaign August to September 1914, Masters Thesis, University of Cape Town, Faculty of Arts, 2003; Warwick, Rodney: The Battle of Sandfontein, The Role and Legacy of Major-General Sir Henry Timson Lukin, Scientia Militaria. 34/2 (2006), pp. 65-92, ; superceded by van der Waag, Ian: The battle of Sandfontein 26 September 1914: South African military reform and the German South-West Africa campaign 1914–1915, First World War Studies, DOI: 10.1080/19475020.2013.828633 (2013).
35. ↑ Collyer: Campaign in German South West Africa p.20, 1937. See also Steijskel, James: The Horns of the Beast: The Swakop River Campaign and World War I in South-West Africa 1914-1915, Solihull 2014, p. 28.

Selected Bibliography

Collyer, John Johnston: **The campaign in German South West Africa, 1914-1915**, Government Printer 1937: Pretoria.

General Staff: **The Union of South Africa and the Great War 1914-1915. Official history**, Pretoria 1924: Government Printing and Stationary Office.

L'Ange, Gerald: **Urgent imperial service. South African forces in German South West Africa, 1914-1915**, Johannesburg 1991: Ashanti.

Lukin, Henry Timson: **Savage warfare. Hints on tactics to be adopted and precautions to be taken**, Cape Town 1906.

Nasson, Bill: **Springboks on the Somme. South Africa in the Great War, 1914-1918**, Johannesburg; New York 2007: Penguin.

Pakenham, Thomas: **The scramble for Africa, 1876-1912**, New York 1991: Random House.

Reitz, Deneys: **Trekking on**, London 1933: Faber & Faber Ltd.

Samson, Anne: **World War I in Africa. The forgotten conflict among the European powers**, London; New York 2013: I. B. Tauris.

Smuts, Jan C., van der Poel, J. / Hancock, W. K. (eds.): **Selections from the Smuts papers, June 1910 - November 1918**, volume 3, Cambridge 1966: Cambridge University Press.

Stapleton, Timothy J.: **A military history of South Africa**, Santa Barbara 2010: Praeger.

Strachan, Hew: **The First World War in Africa**, Oxford; New York 2004: Oxford University Press.

Thompson, Paul S.: **The Zulu Rebellion of 1906. The collusion of Bambatha and Dinuzulu**, in: The International Journal of African Historical Studies 36/3, 2003, pp. 533-557, doi:10.2307/3559433.

Van der Waag, Ian: **All splendid, but horrible. The politics of South Africa's second 'little bit' and the war on the Western Front, 1915-1918**, in: Scientia Militaria. South African Journal of Military Studies 40/3, 2012, pp. 71-108.

Van der Waag, Ian: **Smuts's generals. Towards a first portrait of the South African High Command, 1912-1948**, in: War in History 18/1, 2011, pp. 33-61.

Van der Waag, Ian: **Rural struggles and the politics of a colonial command. The Southern Mounted Rifles of the Transvaal, 1905-1912**, in: Miller, Stephen M. (ed.): Soldiers and settlers in Africa, 1850-1918, Boston 2009: Brill, pp. 251-285.

Van der Waag, Ian: **The battle of Sandfontein, 26 September 1914. South African military reform and the German South-West Africa campaign, 1914-1915**, in: First World War Studies 4/2, 2013, pp. 141-165.

Citation

Katz, David Brock: Pre-war Military Planning and War Aims (Union of South Africa) , in: 1914-1918-online. International Encyclopedia of the First World War, ed. by Ute Daniel, Peter Gatrell, Oliver Janz, Heather Jones, Jennifer Keene, Alan Kramer, and Bill Nasson, issued by Freie Universität Berlin, Berlin 2014-10-08. DOI: 10.15463/ie1418.10695.

License

This text is licensed under: CC by-NC-ND 3.0 Germany - Attribution, Non-commercial, No Derivative Works.