



Sodobni vojaški izzivi

Contemporary Military Challenges

Znanstveno-strokovna publikacija Slovenske vojske

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Junij 2018 – 20/št. 2



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MINISTRSTVO ZA OBRAMBO
GENERALŠTAB SLOVENSKE VOJSKE

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PRIDOBIVANJE IN ZADRŽEVANJE KADRA KOT IZZIV SODOBNIH OBOROŽENIH SIL IN DRUŽB

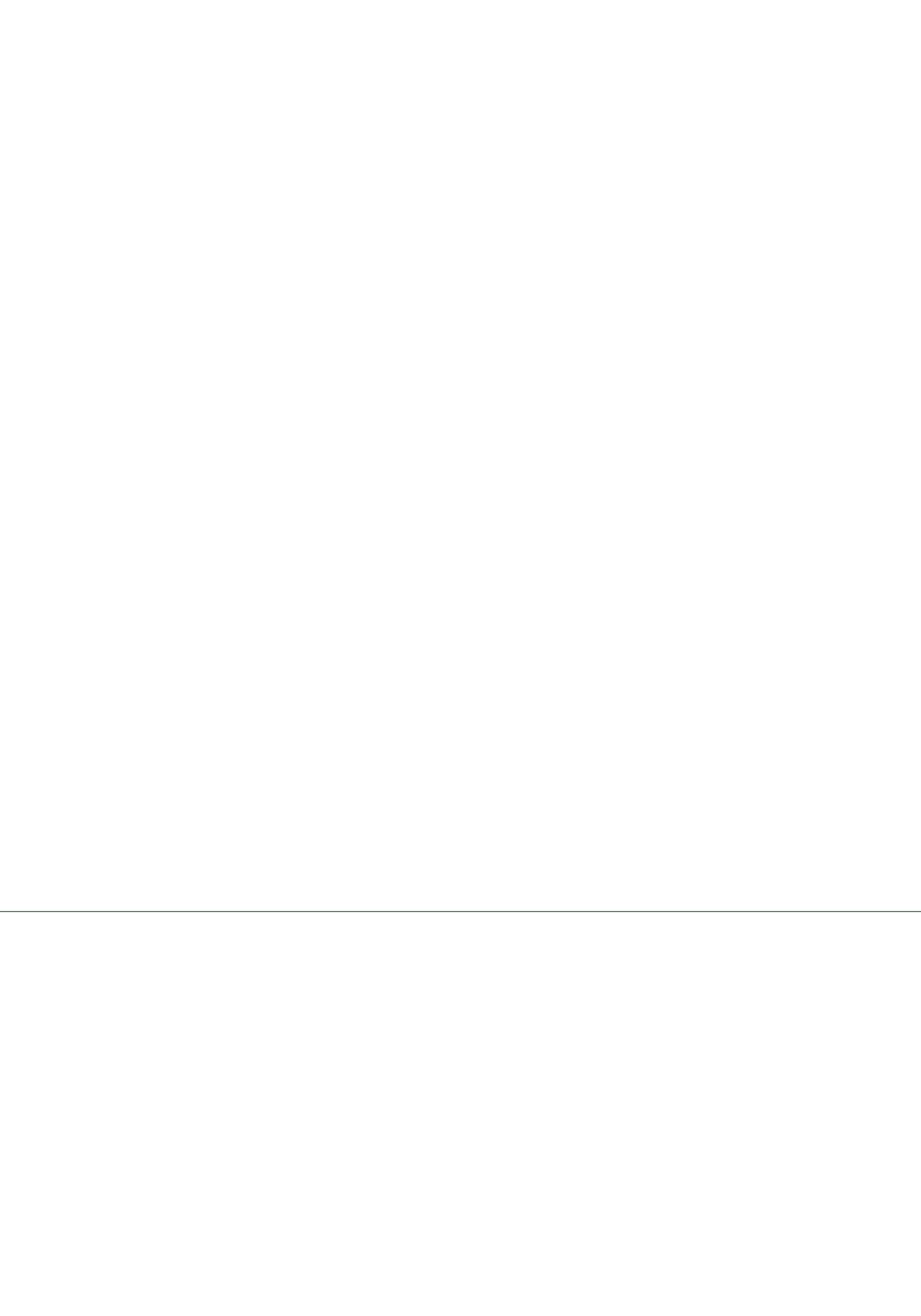
»Mojster Puhlé, pa ne da bi me vi hoteli učiti, kako naj vojake izbiram? Kaj me brigajo udje, mišice, postava, trup in krepak videz človeka? Dajte mi duha, prijatelj Puhlé...«

*William Shakespeare, Henrik IV., str. 13, 1957,
prevod Matej Bor.*

RECRUITMENT AND RETENTION AS A CHALLENGE OF CONTEMPORARY ARMED FORCES AND SOCIETIES

»Will you tell me, Master Shallow, how to choose a man? Care I for the limb, the thewes, the stature, bulk, and big assemblance of the man? Give me the spirit, Master Shallow«.

William Shakespeare: II King Henry IV, iii, 2, 1597



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UVODNIK

PRIDOBIVANJE IN ZADRŽEVANJE KADRA KOT IZZIV SODOBNIH OBOROŽENIH SIL IN DRUŽB

Zadnji teden junija 2017 je v grških Atenah potekala 14. konferenca ERGOMAS-a. Kratica pomeni evropsko raziskovano skupino na področju vojske in družbe, ki je bila ustanovljena leta 1986. To je javna, neprofitna in ideološko neodvisna profesionalna organizacija znanstvenikov. Delujejo prek konferenc, na katerih se srečujejo vsako drugo leto. Skupina deluje na različnih področjih: vojaška profesija, javno mnenje, množični mediji in vojska; morala, kohezija in voditeljstvo; vojaške družine, civilni nadzor nad oboroženimi silami; enakost spolov in vojske; bojavniki za ohranjanje miru, odnosi med vojsko in policijo, nasilje in vojska, pridobivanje in zadrževanje kadrov, veterani in družba, upravljanje vojaških konfliktov in ekonomija miru ter kritične vojaške študije. Za vsako področje je odgovoren koordinator, ki skrbi za pripravo in izvedbo sekcij na konferencah.

Dr. Tibor Szvircsev Tresch je koordinator ERGOMAS-a za področje pridobivanja in zadrževanja kadra v sodobnih oboroženih silah in tudi član uredniškega odbora Sodobnih vojaških izzivov. Z njim smo se v Atenah dogovorili za pripravo posebne tematske številke na to temo. Pridobivanje in zadrževanje kadra v oboroženih silah ni le težava, s katero se zadnjih nekaj let spoprijemata Slovenska vojska in Slovenija, temveč gre za kompleksen pojav, s katerim se srečujejo tudi druge sodobne oborožene sile, družbe in države. Te se po eni strani zelo razlikujejo po različnih dejavnikih, a imajo hkrati enake težave – premajhno število vojaškega kadra, neuspešne načine njihovega zadrževanja in premalo domišljene koncepte za njihov izhod iz oboroženih sil nazaj na trg delovne sile. S problematiko se posamezne države spoprijemajo zelo različno, nekatere v določenih pogledih tudi podobno, dejstvo pa je, da se vse tega lotevajo zelo intenzivno, profesionalno in tudi znanstveno, kar bo razvidno iz člankov v tej tematski številki.

O slovenskih izzivih lahko zapišemo, da je čas za preučevanje tega področja v širšem kontekstu. Težava pridobivanja kadrov za Slovensko vojsko ni le težava Slovenske vojske, temveč slovenske države, ki mora zagotavljati nacionalno varnost.

Avtorji **Johan Österberg, Emma Jonsson in Anna Karin Berglund** v članku z naslovom *Pridobivanje častnikov – izboljševanje procesa* predstavljajo primer švedske vojske, v kateri je prihajalo do velike razlike med številom prijavljenih kandidatov na šolanje za častnike in številom tistih, ki so se na šolanje po selekciji tudi vključili. Zaradi navedenega pojava so leta 2014 pripravili projekt, s katerim naj bi zagotovili ustrežno kakovost kandidatov za oborožene sile in hkrati premostili razlike med željami in sposobnostmi kandidatov.

Članek *Učinki obveznega služenja vojaškega roka na pridobivanje poklicnih pripadnikov v Estoniji* so napisali **Tiia-Triin Truusa, Kairi Kasearu in Liina-Mai Tooding**. Ugotavljajo, da se pozitiven odnos do obrambnih sil in namen, da se posameznik tam zaposli, ne oblikujeta med služenjem vojaškega roka, temveč na to bolj vplivajo izkušnje pred vpoklicem ter sodelovanje v prostovoljnih organizacijah, povezanih z vojsko ali nacionalno varnostjo.

James Griffith se je osredotočil na problematiko pridobivanja kadra za prostovoljno rezervno sestavo ameriških oboroženih sil in svoje ugotovitve napisal v članku *Prostovoljno popolnjevanje v ZDA: nove (in pogosto nepredvidene) težave s pridobivanjem in zadrževanjem kadra ter njegovo pripravljenostjo*. Uporabil je metodo teorije identitete, o njegovih ugotovitvah pa več v članku.

Lahko dobimo to vojno? Pridobivanje kadra v Slovenski vojski in izzivi zadrževanja kadra 15 let pozneje je naslov članka, v katerem avtor **Boštjan Močnik** analizira demografske in ekonomske trende ter nekatere druge vplive na pridobivanje in zadrževanje vojaškega kadra, ki so pomembno vplivali in zelo spremenili popolnjevanje v zadnjem času. Primerja jih z nekaterimi drugimi državami in predlaga nekaj rešitev za »zmago v tej vojni«.

Kanadske oborožene sile so izvedle obsežno anketo na temo zadrževanje kadra v svoji rezervni in stalni sestavi, članek z naslovom *Rezervna sestava: samostojna obravnava in primerjava s težavami stalne sestave* pa so napisali **Joanna E. Anderson, Irina Goldenberg in Jan-Michael Charles**. Med drugim so ugotovili, da je bilo iz rezultatov raziskave mogoče sklepati, da so pogoste domneve, da naj bi pripadniki stalne sestave rezerviste dojemali kot manj predane od njih, neutemeljene.

Prej naštetih avtorji obravnavajo sodobne trende na področju pridobivanja in zadrževanja kadrov, **Elad Neemani** pa se je osredotočil na *Popolnjenost izraelskih obrambnih sil v začetnih letih: od socialne kohezije do strateške krize na področju pridobivanja in zadrževanja kadra*. Piše o temi, ki je zgodovinska in zelo posebna z več vidikov, a ob njenem branju se pri nekaterih težavah iz tistih časov zazdi, kot da so brezčasne.

Dr. Tiborju Szvircsevu Treschu se iskreno zahvaljujemo za intenzivno in zelo profesionalno sodelovanje ter vso pomoč pri nastajanju tematske številke. Našim bralcem, ljubiteljem vojaških in obrambnih vsebin, želim lepo poletje in prijetno branje.

EDITORIAL

RECRUITMENT AND RETENTION AS A CHALLENGE OF CONTEMPORARY ARMED FORCES AND SOCIETIES

In the last week of June 2017, the 14th ERGOMAS Conference was held in Athens, Greece. The abbreviation stands for European Research Group on Military and Society, which was founded in 1986. It is a public, non-profit and ideologically independent professional organization of scientists. They operate through conferences where they meet every other year. The group is actively engaged in various fields: Military Profession, Public Opinion, Mass Media and the Military; Morale, Cohesion and Leadership; Military Families; Civilian Control of the Armed Forces; Gender and the Military; Warriors in Peacekeeping; Military and Police Relations; Violence and the Military; Recruitment and Retention; Veterans and the Society; Military Conflict Management and Peace Economics, and Critical Military Studies. In each of these areas, a coordinator is responsible for the preparation and execution of sessions at conferences.

Dr Tibor Szvircsev Tresch is an ERGOMAS coordinator for recruitment and retention in the modern armed forces, as well as a member of the Editorial Board of the Contemporary Military Challenges. In Athens, we agreed to collaborate on a special thematic issue on this subject. Recruitment and retention in the armed forces is not only a problem the Slovenian Armed Forces and Slovenia have been dealing with in the past few years. Rather, it is a complex phenomenon also encountered by other modern armed forces, societies and countries. On the one hand, they vary greatly with regard to different factors, but at the same time they share the same issues – an insufficient number of military personnel, unsuccessful methods of their retention and insufficiently thought-out concepts of their retirement from the armed forces and return to the labour market. Different countries use different methods to deal with this issue. In some aspects, some of these approaches are even similar. However, the fact remains that all of them use a very intensive, professional and scientific approach, which is also evident from the articles in this special issue.

With regard to Slovenia's challenges, we can note down that it is time to approach this field from a wider perspective. The problem of recruiting personnel for the Slovenian Armed Forces is not only the problem of the Slovenian Armed Forces, but also Slovenia as a country, which is obliged to ensure national security.

In the article *Officer recruitment – improving the process*, **Johan Österberg**, **Emma Jonsson** and **Anna Karin Berglund** present the case of the Swedish Armed Forces, where there was a large gap between the number of applicants and the number of individuals who actually started the Officer Programme. Due to this phenomenon, in 2014, a project was launched with the aim to ensure an adequate quality of candidates, thus bridging the differences between the wishes and the abilities of the candidates.

Article *The effects of conscript service on the recruitment of professional soldiers in Estonia* was written by **Tiia-Triin Truus**, **Kairi Kasearu** and **Liina-Mai Tooding**. The authors have established that a positive attitude towards the defence forces and an individual's intention to join are not formed during the service, but rather pre-conscription experience and involvement in voluntary organizations related to the military or interior security have a bigger influence.

James Griffith focused on the problem of recruitment for the purpose of the U.S. voluntary reserve forces and explained his findings in the article *The United States All-Volunteer Force: emerging (and often unanticipated) issues of recruitment, retention, and readiness*. He used the method of identity theory. More on his findings is available in the article.

Can we win this war? Slovenian Armed Forces recruitment and retention challenges 15 years later is the title of the article, in which the author **Boštjan Močnik** analyzes demographic and economic trends and some other factors related to the recruitment and retention of military personnel, which have significantly influenced and greatly changed the recent manning efforts. He compares them to some other countries and proposes some solutions to "win this war".

The Canadian Armed Forces carried out a comprehensive survey on retention in their reserve and regular forces. The article titled *Reserve force: unique considerations and a comparison with regular force issues* was written by **Joanna E. Anderson**, **Irina Goldenberg** and **Jan-Michael Charles**. Among other things, they established that the results of the research suggested that regular force members' oft-cited perceptions of reservists as being less dedicated than themselves were unfounded.

All of the above-mentioned authors deal with modern trends in the field of recruitment and retention, while **Elad Neemani** on the other hand focused on *Israel Defence Forces manpower in its early years: from social cohesion to a strategic recruitment and retention crisis*. He writes about a topic that is historical and very specific in

many respects, but when reading about it, it seems as if some problems from those times are timeless.

We express our appreciation to Dr Tibor Szvircsev Tresch for his intensive and very professional cooperation as well as all the assistance in preparing this thematic issue. We wish our readers, enthusiasts of military- and defence-related topics, a beautiful summer and pleasant reading.

PREDGOVOR

IZZIVI NA PODROČJU PRIDOBIVANJA IN ZADRŽEVANJA KADRA: ALI OBSTAJA REŠITEV?

Pridobivanje in zadrževanje visoko usposobljenega vojaškega kadra sta bistvena za vse oborožene sile. To še toliko bolj velja za Evropo, saj je večina oboroženih sil z naborniškega sistema prešla na prostovoljno služenje vojaškega roka. Na podlagi predstavitev in razprav na *14. konferenci Evropske raziskovalne skupine o vojski in družbi (ERGOMAS – European Research Group on Military and Society)*, ki je potekala med 26. in 30. junijem 2017 v Atenah v Grčiji, je tokratna tematska številka *Sodobnih vojaških izzivov* posvečena pridobivanju in zadrževanju zainteresiranih mladih ljudi v oboroženih silah.

V okviru delovne skupine ERGOMAS Pridobivanje in zadrževanje kadra, so strokovnjaki z različnih področij predstavili 20 prispevkov. Na petih konferenčnih sekcijah o tej temi so se razvile zanimive razprave o različnih s tem povezanih tematikah. Na prvi sekciji smo se ukvarjali s temo *manjšin v oboroženih silah*, in sicer, kako se lahko vključijo in prilagodijo ter kako lahko sodelujejo v sistemu. Predstavitve na drugi sekciji so se osredotočale na *pridobivanje in zadrževanje kadra v rezervni sestavi oboroženih sil*. *Politika in vojska: medsebojni vpliv in učinek na vojaško osebo* je bila tema tretje sekcije, na naslednji pa smo analizirali *motivacijske dejavnike in razloge za odhode iz vojske*. Na zadnji sekciji smo obravnavali strategije za pridobivanje in zadrževanje kadra. S teh petih sekcij smo izbrali pet predstavitev o vsaki tematiki in jih prilagodili za objavo v publikaciji. V petih člankih, ki so na voljo v tej številki, je tema pridobivanja in zadrževanja kadra obširno obravnavana z zgodovinske perspektive in tudi na podlagi najnovejših izsledkov raziskav.

Na področju vojaške sociologije so se raziskave večinoma nanašale na zaposlovanje prostovoljcev v stalno sestavo, podrobno pa bi bilo treba proučiti tudi rezervne sestave in naborniški sistem. V tej tematski številki se avtorji ukvarjajo tudi z analizo rezervnih sestav in naborniškega sistema z vidika pridobivanja in zadrževanja kadra.

V Evropi se je tematiki pridobivanja in zadrževanja kadra v preteklosti namenjal le malo pozornosti. To je v času hladne vojne veljalo tudi za oborožene sile, ki so temeljile na naborništvu – nove vojake je namreč zagotavljal naborniški sistem. Ena izmed prednosti tega sistema je bila, da so se imeli naborniki (v Evropi je bilo služenje vojaškega roka obvezno le za moške, ženske so se oboroženim silam lahko pridružile prostovoljno, v nekaterih državah pa jim je bilo to celo prepovedano oziroma so jim bila namenjena le pomožna delovna mesta) med služenjem vojaškega roka priložnost socializirati in se prepričati, da je vojaški poklic pravi zanje. Z drugimi besedami – z naborniškim sistemom so oborožene sile pridobile nove ljudi, ki so bili pripravljani na dolgotrajno zaposlitev.

Posledično oboroženim silam ni bilo treba iskati novega osebja na trgu delovne sile. »Notranji« sistem pridobivanja kadra z naborništvom je večinoma zadostoval, da so pridobili dovolj pripadnikov in, kar je zelo pomembno, visoko usposobljen kader. S koncem hladne vojne in novimi misijami pa so oborožene sile dobile nove naloge. Za te nove naloge je bil potreben kader, ki je zmožgel in bil pripravljen ostati v tujini dlje časa, po drugi strani pa so bile potrebne nove veščine za spoprijemanje z novimi okoliščinami na misijah v tujini. Zaradi konfliktov v 90. letih 20. stoletja, kot so zalivska vojna, državljanska vojna v Somaliji, kjer sta delovali dve misiji ZN (UNOSOM I in II), vojna v Bosni in Hercegovini ter vojna na Kosovu, v katero se je vključil Nato, so imele zahodnoevropske oborožene sile velike težave s pošiljanjem usposobljenega kadra na ta krizna območja. Svojevrsten paradoks je, da je bilo v evropske oborožene sile takrat vključenih precej več vojakov kakor danes, vendar pa je bilo v skoraj vsaki državi prepovedano pošiljati nabornike na misije v tujino. Po koncu hladne vojne torej te oborožene sile niso bile kos novim nalogam.

Z izkušnjami, pridobljenimi na teh misijah, sta se začela procesa združevanja evropskih oboroženih sil v večnacionalne sestave in njihova profesionalizacija. Zaradi združevanja v večnacionalne sestave je bilo za številne države pomembnejše, da se pridružijo zavezništvom, predvsem Natu. V večnacionalnem okviru se je začel upoštevati vidik večje interoperabilnosti med različnimi oboroženimi silami, kar je vodilo do bolj profesionalnih struktur. Strukturne spremembe se močno kažejo v številu oboroženih sil, ki so opustile naborništvo. Leta 1990 so imele le štiri izmed 26 evropskih držav sistem, ki je temeljil na prostovoljnem popolnjevanju in ne na naborništvu. Danes je večina evropskih držav prešla na prostovoljno popolnjevanje, s tem položajem pa se je spremenil sistem popolnjevanja. Pritok novih nabornikov je usahnil, zato je bilo treba kader iskati na trgu delovne sile.

Hkrati s spreminjanjem podobe oboroženih sil z množične naborniške vojske na manjšo prostovoljno, so se v civilni družbi začele spreminjati vrednote. Tradicionalne vrednote, kot so poslušnost, disciplina in pokornost, so mladim postajale manj pomembne, bolj cenjene pa so postale druge, kot sta samostojnost in samopotrjevanje. Nekateri izmed vzrokov za te spremembe so bili urbanizacija, vedno višja stopnja izobrazbe ter večje razločevanje in specializacija delovnega okolja. To je povzročilo razhajanje med civilnimi vrednotami, ki v ospredje

postavljajo posameznika, in vojaškimi vrednotami, ki se osredotočajo na skupino. Trenutno se posledice tega procesa kažejo v težavah pri pridobivanju zadostnega števila kakovostnega vojaškega kadra. Vprašanja o človeških virih so za oborožene sile postala preživetvenega pomena – poleg zapolnitve delovnih mest je potrebno tudi njihovo prilagajanje na nove misije v večkulturnem okolju, kar zahteva nujne ukrepe na področju razvoja človeških virov. Pozornost je zdaj usmerjena v širitev bazena, iz katerega bi bilo mogoče črpati ustrezen kader. V oboroženih silah so se tradicionalno zaposlovali mladi belci, kar bi bilo treba dopolniti z zaposlovanjem žensk in mladih priseljenskega izvora. Drugače povedano: novi ciljni pripadniki oboroženih sil morajo biti v enakovrednem položaju s starejšimi pripadniki, ki tradicionalno prihajajo iz naborniškega sistema. Ob upoštevanju tega morajo evropske oborožene sile preoblikovati svoje nazore o pridobivanju kadra tako, da bodo privlačne za te nove ciljne skupine. Prispevki in raziskave, predstavljeni v tej številki, lahko pripomorejo k širšemu razumevanju novega procesa pridobivanja in zadrževanja kadra.

Želim vam prijetno branje.

FOREWORD

CHALLENGES IN RECRUITMENT AND RETENTION: IS THERE A SOLUTION?

The recruitment and retention of well-qualified military personnel are essential for any armed forces. This is even more true because most armed forces in Europe have shifted from a conscript-based to an all-volunteer format. Based on presentations and discussions during the *14th ERGOMAS Conference* in Athens, Greece, June 26-30, 2017, this special publication of *Contemporary Military Challenges* focuses on the challenges of recruiting and retaining interested young people in the armed forces.

In the ERGOMAS Working Group “Recruitment and Retention”, 20 papers from different researchers were presented. In the five conference sessions on this issue, we had interesting discussions on various related topics. Session 1 dealt with the subject of *minorities in the armed forces*, and especially how they can be integrated and how they can participate in the system. In the next session, *recruitment and retention in the reserve forces* stood as the theme of the presentations. *Politics and the military: mutual influence and the effect on military personnel* was the topic of session 3, and session 4 analyzed the *motivational factors and reasons for attrition*. The last session focused attention on *recruitment and retention strategies*. From these five sessions we were able to choose five presentations from all of these topics to adapt as journal articles. In the five articles offered in this journal, recruitment and retention are broadly discussed in historical terms and also based on the most recent research results.

In military sociology research has generally addressed the recruitment of volunteers into the active force, but the reserve components and the conscription system should also be reviewed in detail. This special issue also analyzes reserve forces and conscription systems with regard to recruitment and retention.

In the past not much attention has been paid to the topic of recruitment and retention in Europe. This was also true during the time of the Cold War for the conscript-based

armed forces; the recruitment of new personnel was guaranteed by the conscript system. The advantages of this system were that the conscripted young men (in Europe only men were obliged to enter the armed forces; for women this was on a volunteer basis, and in some countries it was even forbidden for women to join the armed forces, or they could join only in auxiliary positions) could be socialized during their military service and also convinced that a professional military position could be a career for them. In other words, through the conscript system the armed forces were able to win new personnel who could imagine staying in the armed forces as long-term employees.

One consequence of this was that the armed forces did not have to recruit new personnel on the free job market. The 'in-house' recruiting system provided by conscription was in most cases sufficient to catch enough personnel and – very importantly – well-qualified staff. But with the end of the Cold War and new missions, armed forces had to cover new tasks. These new tasks also required, on the one hand, personnel who were able and willing to stay abroad for a longer time, and on the other hand, new skills to cope with the new circumstances in the missions abroad. With the conflicts in the 1990s such as the Gulf War, the Somali Civil War with the United Nations Missions UNOSMO I and II, the Bosnian War and the Kosovo War with the involvement of NATO, Western European armed forces had huge problems sending qualified personnel to these crises. Paradoxically the European armed forces were at that time much bigger in the number of soldiers than they are today, but in almost every country it was forbidden to send conscripted soldiers on missions abroad. Therefore the situation was that after the end of the Cold War these armed forces were not fit for the new tasks.

Through the experience gained within these missions, a process of multi-nationalization and professionalization took place in the European armed forces. Multi-nationalization meant that it was more important for many states to join alliances, especially NATO. In a multi-national framework the aspect of greater interoperability between different armed forces was given heed. This led to more professional structures. This structural change is strongly reflected in the number of armed forces that have suspended conscription. In 1990, just four out of 26 European countries had an all-volunteer force, i.e. no conscription system. Today, most European states have switched to an all-volunteer format for their armed forces. This situation has altered the manning system. The flow of newly conscripted recruits disappeared, and personnel had to be found on the free market.

At the same time as the armed forces were changing from conscript-based mass armies to leaner all-volunteer forces, civil society was engaged in a process of changing values. Traditional values such as obedience, discipline, and subordination became less significant for young people, and values such as autonomy and self-determination were esteemed much more. Some reasons for this were urbanization, an increasing level of education, and greater differentiation and specialization in the working environment. This led to a discrepancy between civil values that focus

on the individual, and military values, which refer to the group dimension. At the moment the consequences of this process can be seen in the difficulty recruiting military personnel in sufficient quantity and quality. Questions related to human resources have become existential for armed forces; not only filling positions in the armed forces, but also adapting them to the new missions in a multicultural environment requires the urgent efforts of human resources development. Attention is now directed towards widening the recruitment pool. Women and young people with a migrant background should complement the traditional recruitment profile of a young, white male. Or in other words, the new recruiting targets must be on an equal footing with the old traditional recruitment basis. With that in mind the European armed forces must alter their recruitment outlook so that they will be attractive to these new target groups. The papers and research presented in this journal may help to broaden the understanding of this new recruitment and retention process.

Have a good read!

PRIDOBIVANJE ČASTNIKOV – IZBOLJŠEVANJE PROCESA

OFFICER RECRUITMENT – IMPROVING THE PROCESS

Povzetek Edini način, da na Švedskem postaneš častnik, je, da končaš triletni program šolanja častnikov. V postopku selekcije za program šolanja častnikov je velika razlika med številom kandidatov in številom posameznikov, ki se v resnici začnejo šolati. Ena izmed posledic tega je, da program šolanja častnikov ni bil v celoti zapolnjen že od leta 2008, zaradi česar v švedski vojski primanjkuje častnikov. Prednostna naloga je torej popolnitev švedske vojske z zadostnim številom usposobljenih častnikov, zato se mora od zdaj naprej število kandidatov za častnike povečevati. Leta 2014 se je začel projekt, katerega namen je preučiti pridobivanje kandidatov in selekcijo za program šolanja častnikov ter prepoznavati dejavnike uspešnosti in področja, na katerih so potrebne izboljšave. Dodatna ambicija tega projekta je tudi uvedba ukrepov, potrebnih za povečanje učinkovitosti pridobivanja kandidatov na podlagi rezultatov in razmerja kandidatov, ki se vključijo v program šolanja častnikov.

Projekt je privedel do izvajanja drugačne strategije pridobivanja kadra v letih 2016 in 2017. V začetku postopka selekcije so s prijavljenimi stopili v stik kandidati, ki so že vključeni v program šolanja častnikov, povabljeni pa so bili tudi na informativni sestanek na švedski obrambni univerzi. S tistimi, ki so bili izbrani za šolanje v programu, so nato stopili v stik njihovi prihodnji poveljniki vodov in jim dali koristne informacije. Rezultati kažejo, da se je število kandidatov, ki so se vključili v program šolanja častnikov, povečalo, osip v izbirnem postopku pa je bil manjši kot prej.

Ključne besede *Pridobivanje kadra, častniki, program šolanja častnikov, švedska vojska.*

Abstract The only way to become an officer in Sweden is to complete the three-year Officers' Programme (OP). In the selection process for the OP, there is a large gap between the number of applicants and the number of individuals who start the programme. One consequence of this is that the OP has not been fully manned since 2008, thus leaving the Swedish Armed Forces (SAF) with a shortage of officers. Manning the SAF with sufficient officers with the right qualifications is a priority, and henceforth the number of cadets must increase. Therefore, in 2014, a project was launched with the aim of examining recruitment to and selection for the OP, as well as identifying success factors and areas of improvement. An additional ambition was to introduce measures intended to increase recruiting efficiency based on the results, and the proportion of individuals who enter the OP.

The project led to the implementation of a different recruitment strategy in 2016 and 2017. Early in the selection process applicants were contacted by cadets already studying on the OP, and were invited to an information meeting at the Swedish Defence University. Those who were selected to start the OP were also contacted by their future platoon commanders, who provided useful information. The outcomes show that the numbers of cadets starting the OP increased, and the dropout rate during the selection process was lower than before.

Key words *Recruitment, Officers, Officers' Programme, Swedish Armed Forces*

Introduction In order to become an officer in Sweden, it is necessary to complete the three-year Officers' Programme (OP). The OP has been an academic education at the Swedish Defence University (SEDU) since 2008. The programme leads to a Bachelor's degree in War Science. In recent years the number of positions available on the OP has been 150. However, the Swedish Armed Forces (SAF) and the SEDU are struggling to fill these positions. The SEDU and the SAF have not succeeded in manning the SAF with a sufficient number of officers for the past 10 years.

During the selection process, there are more individuals voluntarily dropping out than there are those not passing the selection tests. Overall the proportion of individuals dropping out is about 80-85%. The reasons for voluntarily dropping out varies; many applicants already have an academic degree and do not want to spend an additional three years within the education system, while others have a competing duty or position in the SAF (many of those applying are already employed soldiers or NCO's in the SAF). The dropout rate among those who have been admitted to the OP, but have chosen not to start the programme, has been between 20% and 30% for the past three years. These individuals have passed the entire selection process and are qualified and ready to start the OP.

When the all-volunteer force (AVF) was introduced in Sweden 2010, a two category system with NCO's and officers was re-introduced (see Hedlund, 2011). The NCO's take a one-year specialist training course while the officers complete the 3-year academic OP.

Today, there is considerable competition for skilled personnel in the labour market, which presents major challenges for employers in recruiting and retaining qualified personnel. Another recruitment obstacle for the SAF in general, and as a consequence for the OP in particular, is the demographic distribution in Sweden (Jonsson & Österberg, 2017), which resembles the situation in many western countries (Münz, 2007, 2011). The large birth cohorts of the 1940s and 1950s are leaving the labour market, including the armed forces, and will be replaced by smaller birth cohorts. In a few years' time, one of the smallest birth cohorts in Sweden, people born in 1999, will enter the labour market at the same time as larger cohorts are retiring (Statistics Sweden, 2016).

Various studies address the problem of a shortage of military personnel (e.g. Lewis, 2004; Henning, 2006; Korb & Duggan, 2007; Suman, 2015). The challenges in recruiting and retaining individuals remain, regardless of the manning system, be it AVF or general conscription (Szvircsev Tresch & Leuprecht, 2010; Weber & Österberg, 2015).

THE SWEDISH CASE

Österberg et al. (2017) have shown that the retention challenges in Sweden have increased since the introduction of an AVF. Jonsson and Österberg (2017), as well as Österberg (2017), outline the different strategies used by the SAF in order to increase the recruitment base by approaching groups under-represented in the SAF. In addition, Weber and Österberg (2015) describe the generational differences and recruitment in western societies, where the values of the younger population also seem to be changing from materialist to post-materialist priorities (Inglehart, 2008, Inglehart & Welzel, 2010). Furthermore, youths are likely to put more emphasis on self-fulfillment, individual freedom and quality of life, which in turn will restrict the armed forces' ability to meet recruitment and retention goals (Apt, 2005: 89). Hedlund (2011) illustrates how officer education in Sweden has altered over the last 25 years, due to strategic decisions, different manning systems (conscription and AVF), and the implementation of the academic OP.

THE ADMISSION PROCESS FOR THE SWEDISH OFFICERS' PROGRAMME

The initial application is completed online and the application window is open for a period of two months per year. Those qualified at the initial step are those who have completed secondary education as well as the basic military training, have Swedish citizenship, and have passed a background security check. The applicants are then called to the Swedish Defence Recruitment Agency for physical and cognitive tests, which include interviews with a psychologist, as well as with a military officer.¹ The selected applicants are invited to commence the OP in August of each year.

¹ Until 2016 these tests were held in two sessions at different times (here called Test 1 and Test 2); since 2016 all tests have been performed during one session.

THE SWEDISH OFFICERS' PROGRAMME

The OP is run by the SEDU in Stockholm and covers both practical and theoretical studies. Most of the course takes place at the Military Academy Karlberg in Stockholm, except for two semesters which take place at the SAF's arms and service schools. When studying at the OP, every cadet is not only a college student at the SEDU, but also an officer cadet in the Armed Forces Cadet Battalion. The course includes benefits such as meals, accommodation, free travel between the Academy and home, course literature and a daily allowance. The average age of those starting the OP in recent years has varied between 24 and 27 years, and 14-19% have been women.

AIM

All in all, there are significant challenges when it comes to the recruitment of officers, hence the aim of this study is to examine recruitment to and selection for the OP, with the purpose of identifying success factors and areas of improvement. An additional ambition is to introduce measures based on the results intended to increase recruitment efficiency, and the proportion of individuals who enter the OP.

1. METHOD

In order to study recruitment to and selection for the OP, the authors have conducted three different studies, which are described below. The first study investigated how many individuals have the potential to enter the OP annually. The second study analyzed the application and admission statistics of the OP, and the third and final study focused on the dropout rate during the selection process to the programme. These studies gave us an indication of how big the recruitment base is to the OP, as well as the dropout rate and the reasons for dropping out of the selection process.

1.1 Potential for entering the Officers' Programme

The first study investigated how many of the applicants to basic military training (BMT) met the physical and cognitive requirements for the OP annually. The data simulations were based on data from the BMT admission tests 2011-2013, obtained from the Swedish Defence Recruitment Agency ($n = 50,858$). The tests comprise physical and cognitive testing, and applicants must reach a score of 6 on a 9 point stanine scale in general intelligence, psychological ability and leadership potential; a score of 4 (of 9) in physical capability; and 3 (of 9) in muscular performance in order to meet the qualifications for the OP. The results of this study gave us an indication of how big the recruitment base is to the OP.

1.2 Application and admission statistics

Statistics for applications and applicants' attendance at the different stages of the selection process were studied by using data from the SEDU admission section. From

this data, we could see how many applications there were and how many individuals actually started the OP each year since 2008, and relate these numbers to each other.

1.3 Dropout rate during the selection process

Dropout rates during the selection process were studied at three stages in the process: those who did not show up for test 1, those who did not show up for test 2, and those who declined the offer of a position on the OP.

The Research, Education and Student Department at the SEDU assisted the project by giving us the email addresses of those in the sample. Individuals who dropped out at the test 1 or test 2 stages responded to an internet survey, dispatched by the authors, and in 2015 those individuals who were offered a place on the OP but turned it down were sent an email request for participation in a short semi-structured telephone interview. The number of respondents is shown in Table 1. The response rate in the dropout study was 51% for test 1, 30% for test 2 and 56% for the telephone interview.

Table 1:
Number of
participants in
the dropout
study

	Test 1	Test 2	Offered a position
OP 14-17	43	12	
OP 15-18	44	13	20

2. RESULTS

2.1 Potential for entering the Officers' Programme

The potential of applicants for BMT in 2011-2013 to become qualified to enter the OP was studied in 2014 (Jonsson & Österberg, 2014). During these three years, 50,858 applied for BMT, of which 21,838 individuals (43%) attended the admission tests.² The potential to qualify as cadets on the OP was measured using five variables from the admission tests. In order to obtain cadet potential, the eligibility requirements were set at a score of 6 on a 9 point scale in general intelligence, psychological ability and leadership potential; a score of 4 (of 9) in physical capability; and 3 (of 9) in muscular performance. Approximately half of the individuals tested met the requirements in the psychological variables, and just over 90% met the physiological requirements. In total, 22% of those tested (or 9.5% of all applicants) achieved all five eligibility requirements, thus obtaining cadet potential. Therefore, there were approximately 1,600 individuals annually with cadet potential, which is significantly

² Note that there were a number of individuals who applied and tested more than once.

higher than the actual numbers of applicants to the OP (approximately 500 annually, see Table 2).

Interest in becoming an officer among the applicants for BMT is quite high, with about 50% of applicants saying that they are interested. The study of cadet potential (Jonsson & Österberg, 2014) showed that this potential was higher among those who were interested than among those who were not interested. Overall, 19% of the individuals taking the admission tests were both interested and had potential. The study also showed that three out of ten who had cadet potential did not state an interest in an officer role.

2.2 Application and admission statistics

Table 2 shows the number of applicants, the number offered positions, and the number who actually started the OP in the period 2008-2017, as well as the dropout rate in the final stage and for the entire process (total dropout).

Table 2: Number of applicants, number offered positions, and number who started the OP in the years 2008-2017, as well as the percentage dropout in the final stage and in total. Pilots and special assignments are excluded; they are selected in a different way and do not apply through the same process as those included in this study.

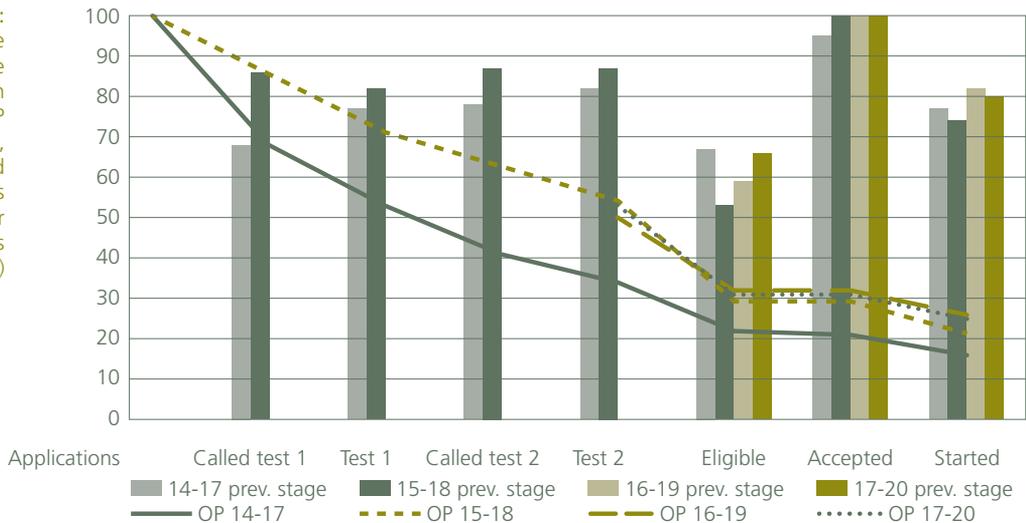
Year	Applicants	Offered place	Started	Dropout rate, final stage (%)	Total dropout rate (%)
2008	457	140	101	27.9	77.9
2009*	625	150	150	-	76.0
2010*	753	90	89	1.1	88.2
2011*	454	90	86	4.4	81.1
2012	350	90	75	16.7	78.6
2013	313	106	85	19.8	72.3
2014	601	125	96	23.2	84.0
2015	497	143	104	27.3	79.1
2016	462	146	118	19.2	74.4
2017	507	165	132	20.0	74.0

* The low dropout rate at the final stage 2009-2011 can be explained by reserve admissions. Data from the Research, Education and Student Department at the SEDU.

In recent years, the number of applicants for the OP has varied. Table 2 also shows that the dropout rate during the admission process is very high (approximately 80%). The OP admission process aims to find the best candidates for the programme and for the officer profession. During the various stages of the process, individuals who do not meet the requirements are eliminated. At the end those who meet the requirements and are judged to be most suitable are admitted. However, at each step in the admissions process, a number of individuals who are qualified for the next

stage choose to drop out for various reasons. Figure 1 shows the dropout rate for the OP 14-17, 15-18, 16-19 and 17-20 at each stage in the admission process.³ The lines represent the proportion of applicants who succeed in the process overall. The bars represent the proportion of applicants who continue to the next stage from the previous stage.⁴

Figure 1: Dropout rate during the admission process OP 14-17, 15-18, 16-19 and 17-20 (pilots and other assignments excluded)



In general the lines and bars show a similar pattern, but there are some year specific variations. As shown in Table 2, the number of applications almost doubled in 2014 in comparison to 2013. 2014 was the first year that applications were administered by the general website for applications to Swedish universities. Even though numbers increased, several applicants did not meet the basic qualifications for the OP, e.g. they had no basic military training. This led to a higher dropout rate of applicants in 2014 than, for example, 2015, and this dropout affected the proportion of applicants who succeeded in passing the admission tests. In the end, 16% of the applicants in 2014 started the OP. This percentage has increased every year since then, and in the following sections we will discuss possible reasons why. In 2015, 21% of the applicants started the OP; however, in that year a higher proportion of applicants did not pass test 2, were ineligible, or chose not to start the OP. In 2016 and 2017 the proportions succeeding in the admission process were quite similar. In comparison with 2015, these two years also had a slightly higher proportion of applicants who were eligible for the OP after the tests, and a higher proportion of applicants who were admitted to and started the OP.

³ OP 14-17 started in 2014 and graduated 2017, OP 15-18 started in 2015 and graduated 2018, and so on.

⁴ In 2016 the admission process changed slightly and the two test occasions were replaced by one, the aim being to reduce the dropout between the two tests. Hence the lines and bars from OP16-19 and OP 17-20 start later in the process.

Ideally, all qualified individuals would move on to the next stage in the admission process, but as Figure 1 shows, this is not the case. A study was set up to find out the reasons for voluntary dropout at three different stages of the admission process (before Test 1, Test 2 and Admitted). The demographics of the respondents who failed to make the next stage are shown in Table 3. Because of the small sample sizes, the Table shows actual numbers and not percentages.

Table 3: Demographic variables for participants in the dropout study, in numbers (mean and standard deviation for age).

	Test 1		Test 2		Admitted
	OP 14-17	OP 15-18	OP 14-17	OP 15-18	OP 15-18
n	43	44	12	13	20
Age (M, SD)	28.0 (5.9)	28.9 (5.7)	27.3 (5.7)	25.9 (3.9)	24.8 (2.9)
Gender					
Female	3	3	1	1	2
Male	40	41	11	12	18
University experience	27	26	6	7	9
Basic military training					
Conscription	30	34	6	10	7
Volunteer + preparatory officer training	2	1	0	0	7
Volunteer + 9 month employment	12	7	6	3	6
Occupation					
Military	10	5	10	9	16
Civilian	31	36	2	4	4
Officer in the family	6	8	1	0	8

The applicants who dropped out at the earlier stages were older than the applicants who dropped out later, and also older than the cadets generally (mean age 24 years at the start of the OP). More than half of them had experience from university studies and were more often civilians rather than military. Applicants who voluntarily dropped out at test 2, and after being admitted to the OP, were more often military personnel employed by the SAF ($p < 0.01$).

2.3 Dropout rate during the selection process

The reasons why applicants failed to attend the tests varied (work, studies, or temporary illnesses such as influenza). Some applicants indicated that they could not attend the test and had tried to change the date. Several applicants stated that they

had not received an invitation to the tests at all or on time. Another common reason for applicants not attending tests was that they thought that they would not meet the requirements. This indicates that failures to attend could have been prevented in some cases. After 2014, the system became more flexible, which meant that the applicants had a greater chance of attending test 1.

The applicants who made it through the whole admission process and were admitted to the OP but turned down their position often had several reasons for doing so. The most common reason was that they already held, or had been offered, other employment in the SAF. Very often these were attractive positions, including offers to go on international operations. Many applicants had also been admitted to NCO training, and chose that career path instead. Others had received an attractive civilian job offer or chosen civilian studies. Some chose an alternative military engagement in order to gain more experience before they started the OP. Other factors that emerged were financial reasons, family and life situations, and some experienced a lack of confidence in the SAF. Some of those who had done the preparatory officer training were dissatisfied with the training. This dissatisfaction was based on uncertainties and a lack of structure, as well as a lack of information about admission to the OP and unclear career opportunities.

Most applicants who underwent the entire admission process thought the procedure and the tests were relevant. However, some thought that the admission process was too extensive and some felt that it was irrelevant to repeat tests they had already passed in order to enter BMT. Nevertheless, they still saw the benefits of the tests and ultimately thought it was better to test too much than not enough. One applicant thought the requirements could be tougher.

Applicants were asked if they would apply for the OP again; the results are shown in Table 4.

Table 4:
Future application, percentage
* Response option only applicable for OP 14-17.

	Test 1		Test 2		Admitted
	OP 14-17	OP 15-18	OP 14-17	OP 15-18	OP 15-18
Already applied*	24		50		
Yes	26	41	25	31	89
No	7	14	8	0	11
Don't know	43	45	17	69	0

Only a few applicants said that they would not apply for the OP again. Applicants for the OP 14-17 were surveyed one year after the admission process, when the application process for the OP 15-18 had already started. The results showed that almost 25% of the dropouts at test 1 applied again, as did 50% of the dropouts at test 2. For some respondents this could have been a hypothetical question. One respondent stated in a telephone interview that of course it was possible, but only if an alternative job turned out to be a disappointment, which at the time seemed unlikely.

2.4 Measures

Based on the results from the project the SEDU took measures, and the flexibility and adaptability in the selection process have increased. Today possible cadets do not miss the chance to start the OP because they have the flu in January; instead the date of the test can be rearranged. Earlier studies of recruitment in a Swedish military context show that personal contact is important when attracting and recruiting young people to the armed forces (Jonsson & Österberg, 2017; Österberg, 2017). For this reason one of the measures taken to enhance the recruitment and selection process was to start a project called “A Cadet Calls” in 2015. Cadets phoned the applicants and gave them information about the OP, accommodation at the Military Academy, and other aspects of life as an officer cadet, as well as listening and responding to the applicants’ questions.

Results from “A Cadet Calls” showed that six areas were most prevalent during the calls: the selection process (when, where, how), basic needs (food, travel, insurance), academic content (courses, essays, and exams), military content, semesters spent at an SAF arms and service schools, and career development.

A year later, in 2016, this measure was expanded, and the admitted applicants were contacted by their future platoon commander.

In all, the contact process is now as follows:

1. Every applicant gets a welcome email from the OP management, with information and useful telephone numbers and website addresses; furthermore, the applicants get useful information on how to prepare themselves for the upcoming physical and cognitive tests;
2. Every applicant is invited to an information evening with cadets from the OP;
3. There is an open house at the Military Academy for those already employed in the SAF, and those who have applied to the OP;
4. For those admitted to the OP, their future platoon commander phones and introduces themselves and answers questions;
5. Those admitted to the OP receive an email from the OP management providing information about the start of the programme.

Discussion

The aim of this project was to examine recruitment to and selection for the OP, with the purpose of identifying success factors and areas for improvement. The demographic distribution in Sweden makes it difficult for organizations to recruit qualified personnel, and in combination with this, Sweden also has a historically low rate of youth unemployment. These conditions make the attractiveness of the SAF in general, and the OP in particular, of utmost importance in manning the military with officers. For these reasons, communication to the young and the messages the SAF sends out need to be improved. Several major industrial companies consciously work to recruit young people who are attractive to the labour market (i.e. people in the OP target group). The SAF needs to improve its recruitment strategies, as it is fighting with more experienced companies for the best candidates.

Ideally, all applicants who are invited to the tests should complete them, and all those selected for the OP should start the programme. The number lost due to “self-selected” dropout (i.e. not attending tests, and turning down the offer to start the OP), corresponds with the number of cadets who actually start the OP. Each individual who drops out late in the process has cost a lot of money in terms of testing, advertising and recruitment. Whether or not the applicants who do not attend the tests have the qualifications to start the OP is unknown; however, it is likely that some of them at least have what is required. One of the reasons stated for not attending the tests was that the individual doubted their ability to pass the tests. Previous studies (e.g. Jonsson & Carlstedt, 2012) have shown that there is a covariation between applicants’ goals and their qualities. It is possible that the applicants have good self-awareness of their qualities, and that this form of self-selection not is unfavourable. Nevertheless, it may be worth keeping in touch with these individuals, and through training tips, apps, information, mentor programmes etc. retain their interest and improve their ability to pass the tests and the training. Furthermore, the SAF needs to restore the local geographical links to a unit when recruiting, in order to improve the possibility of more personal contact with those interested in the OP.

An additional ambition of the project was to introduce measures based on the results intended to increase recruitment efficiency, and the proportion of individuals who enter the OP. The measures taken seem to have paid off. Results indicate that repeated personal contact with cadets and officers has a positive impact on recruitment to the OP, and the percentage of applicants who start the OP has increased from 16% to 26%. Maybe early actions, such as those suggested above, could improve the results even more.

Another factor that further advocates the benefits of contacting previous applicants to the OP is that many who drop out from the selection process are still interested in starting the OP. When individuals who did not attend test 2 in 2014 were contacted in the spring of 2015, half of them had already applied for the OP 2015-18, and 25% were considering applying again. Only one of those who declined the offer of a position on the OP 15-18 had dismissed a future at the OP. We received many

positive responses when we contacted those who had declined a position on the OP, but some thought it was strange that nobody had been interested in them and contacted them before. These results are well in line with those of Jordan et al. (2015), who found that military cadets' decisions to sign a contract were significantly related to perceived organizational support.

The results of the present study show that about 10% of those applying for BMT have the potential to be admitted to the OP. The project proposes that these individuals should be identified during the admission test to BMT, and informed about their capabilities, as well as about the OP and the officer profession. The OP potential study also highlights another important area, namely that approximately 1,600 individuals per year have the capability required to start the OP, indicating an idea of the minimum size of the potential recruitment pool. However, the number of people actually applying for the OP annually is significantly lower. The project suggests that it would be beneficial to approach those individuals who already have shown interest in the SAF and also have potential (see Jonsson & Österberg, 2017).

Furthermore, the results shows that those withdrawing their applications early in the selection process are generally older and have higher academic qualifications. The SAF needs to be able to offer something different to these applicants. At the moment, a revised OP is being proposed, where individuals who already have a college degree can complete a shorter version of the OP.

Applicants who drop out later in the process are often employed by the SAF and a common reason for choosing not to start the OP was that they chose the shorter NCO training instead. To some extent, the SAF in general, and military units in particular, are the OP's biggest competitor. For officers working at platoon level, it can be difficult to lose their best soldiers for three years, thus creating vacancies. Here the military units must become better at promoting the OP, in order to guarantee the best for the overall personnel supply of the SAF, instead of looking at their own best.

It is important to continue studies of applicants and those admitted to the OP, because the supply of officers is an important task for the SAF. The number of soldiers recruited is irrelevant, if there are no officers who can train them.

The project to evaluate the selection for and recruitment to the OP will continue with a qualitative follow-up of the training at the SAF arms and service schools.

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UČINKI OBVEZNEGA SLUŽENJA VOJAŠKEGA ROKA NA PRIDOBIVANJE POKLICNIH PRIPADNIKOV V ESTONIJI

THE EFFECTS OF CONSCRIPT SERVICE ON THE RECRUITMENT OF PROFESSIONAL SOLDIERS IN ESTONIA

Povzetek Estonske obrambne sile so urejene po načelu rezervnih sil, zato je v Estoniji v veljavi obvezno služenje vojaškega roka. V tem članku preučujemo, kako sistem obveznega služenja vojaškega roka vpliva na proces pridobivanja kadra v estonskih obrambnih silah (EOS). S pomočjo podatkov iz ankete, izvedene med estonskimi naborniki, bomo preučili individualne in strukturne dejavnike, ki vplivajo na to, koliko so EOS zanimive kot delodajalec med naborniki. Testirali smo dve predpostavki, ki temeljita na teoriji. (1) Ob upoštevanju pristopa družbenega učenja predpostavljamo, da pozitivne in negativne izkušnje v času obveznega služenja vojaškega roka lahko vplivajo na namero posameznika, da se zaposli kot poklicni pripadnik. (2) Na podlagi predpostavke o izbiri predvidevamo, da bodo tisti, ki so imeli pred vpoklicem pozitivne izkušnje z vojaškim načinom življenja, sprejeli obvezno služenje vojaškega roka v bolj pozitivni luči in jim bodo obrambne sile kot delodajalec zato še bolj zanimive. Rezultati kažejo, da je predpostavka o izbiri bolj podprta. To pomeni, da se pozitiven odnos do obrambnih sil in namen, da se posameznik tam zaposli, ne oblikujeta med služenjem vojaškega roka, temveč na to bolj vplivajo izkušnje pred vpoklicem ter sodelovanje v prostovoljnih organizacijah, povezanih z vojsko ali nacionalno varnostjo. Lahko bi rekli, da se odnos, ki ga je nabornik razvil pred obveznim služenjem, s služenjem vojaškega roka še bolj utrdi.

Ključne besede *Obvezno služenje vojaškega roka, naborništvo, pridobivanje kadra, obrambne sile, Estonija.*

Abstract The Estonian Defence Forces have been structured according to the principle of reserve force, and therefore Estonia uses compulsory conscription. In this paper, we will explore how the compulsory military service system influences the recruitment process into the Estonian Defence Forces (EDF). More precisely, we will study the

individual and structural factors that determine the perceived attractiveness of the EDF as an employer among conscripts by using data from the Estonian Conscript Survey. We are testing two theory-driven assumptions: (1) following the social learning approach, we assume that positive and negative experiences during the conscription period may have an influence on the intention to continue as a professional in the military; (2) based on the selection hypothesis, we assume that those who have had positive experiences with the military way of life before being drafted will perceive compulsory military service in a more positive light, and therefore the attractiveness of the Defence Forces as an employer may even increase. The results show that the selection hypothesis has stronger support. It means that positive attitudes and the intention to join the defence forces are not formed during the service, but rather pre-conscription experience and involvement in voluntary organizations related to the military or interior security have a bigger influence. The service could be seen as affirming the attitudes that the conscript had already developed prior to conscript service.

Key words *Conscription, recruitment, defence forces, Estonia*

Introduction Most Western militaries are not only struggling to attract and recruit young people to fill their ranks; they are also hard-pressed to retain the trained and skilled personnel they already have. After the Cold War, the North Atlantic Treaty Organization (NATO) and its member states estimated that the most immediate task concerning the militaries of the former Warsaw Pact countries would be to reform those militaries and establish Western standards for civil-military relations; in short, to reunite Europe also in the sense of military affairs (Spohr Readman, 2004).

However, the events of September 11, 2001 led to a re-definition of the understanding of security and conflict, posing different challenges for militaries, and spurred the abolishment of large conscript-based armies, leading to the all-voluntary force, the professionalization of the armed forces in most European countries. Nevertheless, some countries believed that their military needs would continue to be better served by a conscript- and reserve-based military. These were mostly smaller countries that bordered on historically aggressive neighbours, and which had strong public support for continued conscription. They also tended to be countries where the economic and socio-cultural cost of transforming the conscript- and reserve-based armed forces into an all-voluntary force was considered too high (Herranen, 2004).

However, regardless of a country's chosen military model, there are still recruitment and retention (R&R) issues that need to be addressed. The NATO research task group HFM-107 (*Recruiting and Retention of Military Personnel*, 2007) stressed in its report that R&R in NATO countries is affected by a variety of factors, including low unemployment rates; incongruence between the prevailing social values and the military organizational culture; military operational and personnel tempo; relatively higher private sector wages; the geographical location of military jobs; promotion systems based on seniority versus merit; mismatches between individual interests and

job assignments; the management of the major processes of recruitment, selection and classification; turnover and retention; and the shrinking of the 18-24-year-old target demographic.

THE ROLE OF CONSCRIPTION

The motivation driving enlistment into the all-volunteer force has been extensively studied, as have recruitment tactics, and, at least in the US, they show reasonable stability over the course of time (Woodruff, 2017). Previous research has also examined the effect of conscription on recruitment into the armed forces as an active serviceman. Gilroy and Williams (2006) note that R&R depends not just on demographic factors but also on the general public opinion with regard to the defence forces and conscription, national defence and veteran policy, social factors, and economic and labour market conditions. Estonia is among the countries that mandate compulsory military service for young males – for Estonian citizens in its case – at a time when most European countries have scrapped compulsory military service (Gilroy and Williams, 2006). Cronberg (2006) posits a correlation between conscription and the general will to defend one’s country – that is, the extent to which the role of conscription is valued in the national identity correlates with a general will to defend one’s country. Yet conscription itself varies greatly from one country to the next in terms of duration, percentage of those completing service and percentage of those who voluntarily become conscripts (Cronberg 2006).

Leander (2004) highlights that support for conscription and various countries’ decision to continue conscription is related to views of the role and necessity of conscription – in other words, to the types of myths prevalent in a society in connection with compulsory military service. In Estonia, public support for the conscription- and reserve-based army model is very high, ranging from an all-time low of 85% in 2007 to 92% in 2017 (Kivirähk, 2017).

In the next section, we will take a brief look at the Estonian military context.

THE ESTONIAN MILITARY CONTEXT

The EDF is structured according to the principle of a reserve force with compulsory conscript service for all male citizens. Since 2013, female citizens have been able to join the conscript service on voluntary basis. The duration of the conscript service is either 8 or 11 months, depending on the conscript’s speciality and position within the military. Male citizens can expect to be called up from the age of 17 up to the age of 27.

In addition to the EDF, Estonia also has a voluntary militarily organized national defence organization called the Estonian Defence League (EDL). This organization was re-established in 1990, a year before Estonia regained its independence from

the Soviet Union. The task of the Estonian Defence League is to enhance, by relying on free will and self-initiative, the nation's readiness to defend the independence of Estonia and its constitutional order (Estonian Defence League Act, 2013). The EDL has three affiliated organizations: the Women's Voluntary Defence Organization (WVDO), the Young Eagles and the Home Daughters. Young people can become junior members of the EDL and the WVDO at the age of 16. The Young Eagles and the Home Daughters are youth organizations that aim to provide young people with a variety of activities combined with patriotic education. All of these four organizations were established before WWII, during the first period of independence (1918-1940), and were at that time large mass organizations. Today, the popularity of these organizations has not reached the levels of participation they enjoyed prior to WWII; nevertheless, they represent the nation's will to defend itself and are often referred to as the nation's "safety blanket".

1. THEORETICAL ASSUMPTIONS

The aim of this article is to elaborate on the effect that conscript service has on the intention to choose a military career as a professional service member of the EDF. The theoretical ground of our study is based on a number of theories: the enlistment decision-making model, which in turn is based on the theory of behavioural intention; the social learning theory of career decision-making; and the selection approach.

1.1 The enlistment decision-making model

In this article, we rely on the assumptions of the theory of behavioural intention (Fishbein and Ajzen, 1975), which addresses the relationship between attitudes and behaviours. The main idea is that behavioural intention is the precondition for actual behaviour, and this intention is in turn affected by attitudes towards behaviour and subjective norms, as well as by the perception of one's own capability to conduct the behaviour. In military studies, this idea has been developed into the Enlistment Decision-Making Model, which presupposes that enlistment behaviour is influenced by enlistment intention (Lagree et al., 2000), and enlistment intention is in turn influenced by attitudes towards and subjective norms on enlistment in the armed forces. "Subjective norms" refers to how parents and peers will see and support the enlistment behaviour. Empirical findings have indicated that intention has a significant role in the formation process of the behaviour. For instance, military propensity has been seen as the main predictor of military enlistment, and demographic, educational and family factors influenced enlistment indirectly via propensity (Bachman et al., 2000).

Relying on these approaches and empirical findings, we will concentrate on the intention to join active service in the EDF. Furthermore, in our conceptual model we include aspects of the employer knowledge model (Cable and Turban, 2001), which has been tested in military studies by Lievens et al. (2005). According to their findings, the attraction of military organizations as employers depends on

trait inferences, how familiar the applicant is with military organizations, how they perceive the job and organizational attributes (Lievens et al., 2005). Moreover, the trait inferences and job and organizational attributes have more pronounced effects when familiarity with military organizations is high. Research also shows that those who join the armed forces as professional military service members because of intrinsic goals, such as altruism and self-enhancement, may in the long run turn out to be more desirable members of the military organization than those who have joined for extrinsic goals, such as, for example, economic goals (Woodruff, 2017).

1.2 The social learning theory of career decision-making and the selection approach

Here we take into account ideas from two widely applied classical approaches in social sciences – social learning theory and the selection hypothesis. Specifically, we are interested in whether and how the intention to join the active service changes during the conscription period. Krumboltz (1979) developed the Social Learning Theory of Career Decision-Making (SLTCDM). The theory identified four categories of factors that influence the decision-making path for any individual: genetic endowment and special abilities; environmental conditions and events; learning experiences; and task approach skills. In the case of conscript service as the precondition for joining the active military service¹, two of the four categories are especially important. According to Krumboltz (1979), environmental conditions and events refer to social, political and economic forces, which are mostly outside the individual's control, e.g. policies and procedures of recruitment of military personnel. As stated by (Ginexi et al., 1994) the decision to enter the military may be affected by the concrete benefits offered by military service. In case of the EDF, conscript service could be seen as an environmental condition and an event which could potentially make the career path into the military a smoother process (e.g. a precondition for studying at the Estonian Defence College). Secondly, conscript service could be seen as a learning experience which prepares a person for a military career. Compulsory military service carries both aspects of learning – the instrumental learning experience and the associational learning experience. Instrumental learning means that an individual is positively reinforced or punished for the exercise of a particular behaviour. In conscript service, both positive and negative reinforcements are used. Associational learning occurs when an individual associates some previously neutral event or stimulus with an emotionally laden event or stimulus. Thus, positive military-related experiences before or during conscription may influence the intention to join the active service.

Social learning theory also stresses the importance of self-efficacy on behaviour. In essence, if an individual is confident about his or her skills, and that the use of these skills will likely have positive outcomes, the intention to repeat these activities increases. Thus the expected skills and obtained skills during conscription may have a significant influence on the decision to join the active service. However, following

¹ In most cases conscription service is the usual way into service in the EDF. However, one can also join if one has completed military basic training in the EDL.

the SLTCDM model, the fourth component is task approach skills, which could be seen as interactions between learning experiences, genetic characteristics, special attitudes and environmental influences. For instance, these skills may include performance standards, work habits, perceptual and cognitive processes, mental sets, emotional responses and so on. The experience of conscription may have, in different individuals, a diverse influence on the intention to join active service, depending on the composition of the aspects of social learning highlighted above.

In our analysis we are also aware of the selection model approach, which points out that, according to various background characteristics, some people are more suitable for some kinds of activities, career choices and so on. For instance, studies from the US have shown that social background, academic experiences and vocational choices made during the high school years had a significant influence on enlistment (Bachman et al., 2000).

2. METHOD

2.1. Data

The present study uses data from the on-going Estonian Conscript Survey (ECS) to examine the influence of a conscript's characteristics and conscript service on the behavioural intention to continue their military career in the defence forces. The survey was initiated in cooperation with the Centre for Applied Studies of the Estonian Defence College and the Centre of Excellence for Strategic Sustainability at the University of Tartu. The study was designed as a longitudinal research questionnaire for conscripts and reservists in 2016. The survey is a part of an ongoing research project within the EDF: "The development of human resources research in defence".

All conscripts are given the opportunity to participate in the ECS, but they can also decline to participate without any consequences for them, their service period or their future career in the military. The data is gathered via tablets, using LimeSurvey software, in the units to which the conscripts are assigned. To secure anonymity and confidentiality, the conscripts are assigned codes which are different from their personal ID codes, so that longitudinal data can be connected to the same person, but that person cannot be identified by the researchers. The data is analyzed anonymously.

The data used in this article is from the ECS 2016-2017 pilot study, which was carried out in three survey waves among the conscripts that started their service either in July 2016 (11-month service) or in October 2016 (8-month service). The three waves of the survey during their service took place in the first month, then after the soldier's basic training course (month 3-4), and again during the last month before ending the service.

The questionnaire included topics such as: knowledge of and attitudes towards the EDF; attitudes towards the compulsory draft; experiences during conscription;

opinions about society, security and, individual values; health and health behaviour; learning skills; and motivation.

In 2016 the number of people drafted was 2,956, and the response rate of the first wave was 90% in the July draft and 92% in the October draft, giving a total sample size in the first wave of 2,677 individuals. Between the first and second waves of the survey, 382 conscripts were transferred to the reserves, mainly due to health reasons². The response rate of 83% in the second wave means that 1,908 individuals finished this questionnaire. In the third wave, 1176 individuals completed the questionnaire and of these, 64% provided longitudinal data. Thus the longitudinal sample holds data from 750 individuals i.e. those who participated in all three waves of the ECS. Excluding those discharged early – i.e. those transferred to the reserves before finishing their service – the response rate for the third wave was 35%.

For this article, we analyzed the longitudinal data from the 750 conscripts. The mean age of the respondents was 20.5 (SD=1.5, age span 18-28 years). In terms of the level of education, 22% had basic education, 71% secondary education, and 7% had completed tertiary education. Based on age and education, we did not find significant differences between the longitudinal sample and the total sample of the first wave, only that in the longitudinal sample, the proportion of voluntary conscripts was higher – 42% compared to the 38% in the cross-sectional first wave sample. Following the theoretical assumptions of the Enlistment Decision-Making Model, in our analysis we divided the conscripts into two groups: those who had previous experience with the EDL or other voluntary interior security organizations (22%), and those who did not have such experiences.

2.2 Measures

Our dependent variable was behavioural intention towards becoming an active serviceman. The respondents were asked, “How do you feel about becoming an active serviceman in the EDF?” (*Active service* in the model). The question was rated on the following scale: 1 = Definitely want to become an active service member, 2 = Probably would become an active service member, 3 = Would consider this opportunity depending on the circumstances, 4 = Probably would not consider it, 5 = Definitely would not consider it. This question was included in all three waves of the 2016 ECS.

Defence-related attitudes Defence-related attitudes were measured by three questions in the first wave of the survey:

1. In your opinion, how important is the participation of Estonian military units on foreign missions to Estonian security? (*Deployments* in the model) This

² Release of the conscript from conscript service before the expiry of the conscript service can be due to: 1) no longer complying with the health requirements of the EDF; 2) becoming a parent; 3) the conscript becomes the only person maintaining a person with a severe or profound disability; 4) becoming a member of the national or EU parliament; 5) imprisonment; 6) serious unexpected family problems; 7) becoming a cadet; or 8) death (Military Service Act; RT I, 10.07.2012). However, health reasons are the most common cause of early release.

question was rated on a 4-point scale ranging from 1 = Very important to 4 = Not important at all.

2. Please indicate whether, in the event of a foreign armed invasion, it would be possible to defend Estonia until allies come to our assistance? (*Defensibility* in the model) The respondents could answer on a 4-point scale ranging from 1 = Yes, definitely to 4 = Definitely not.
3. In recent years, political tensions in Europe have increased. How likely is it, in your opinion, that Estonia will have to defend its territory militarily in the next 10 years? (*Threat level* in the model) The answers were rated on a 5-point scale ranging from 1 = Very high to 5 = Very low.

Socio-demographic background characteristics In the analysis we included the age of the respondent, their educational level, and whether they had had any previous connections with the EDF, e.g. being part of the Estonian Defence League, or any patriotically oriented youth organizations.

The *merits of the EDF* index was based on 11 items measuring the extent to which the conscripts agreed with statements about different aspects of the EDF, e.g. the EDF is respected in society; the EDF is seen as a good employer and career opportunities in the EDF are good (see Appendix 1 for the list of items). The items were rated on a 5-point scale ranging from 1 = Strongly agree to 5 = Strongly disagree. The merits of the EDF were estimated in each wave of the survey.

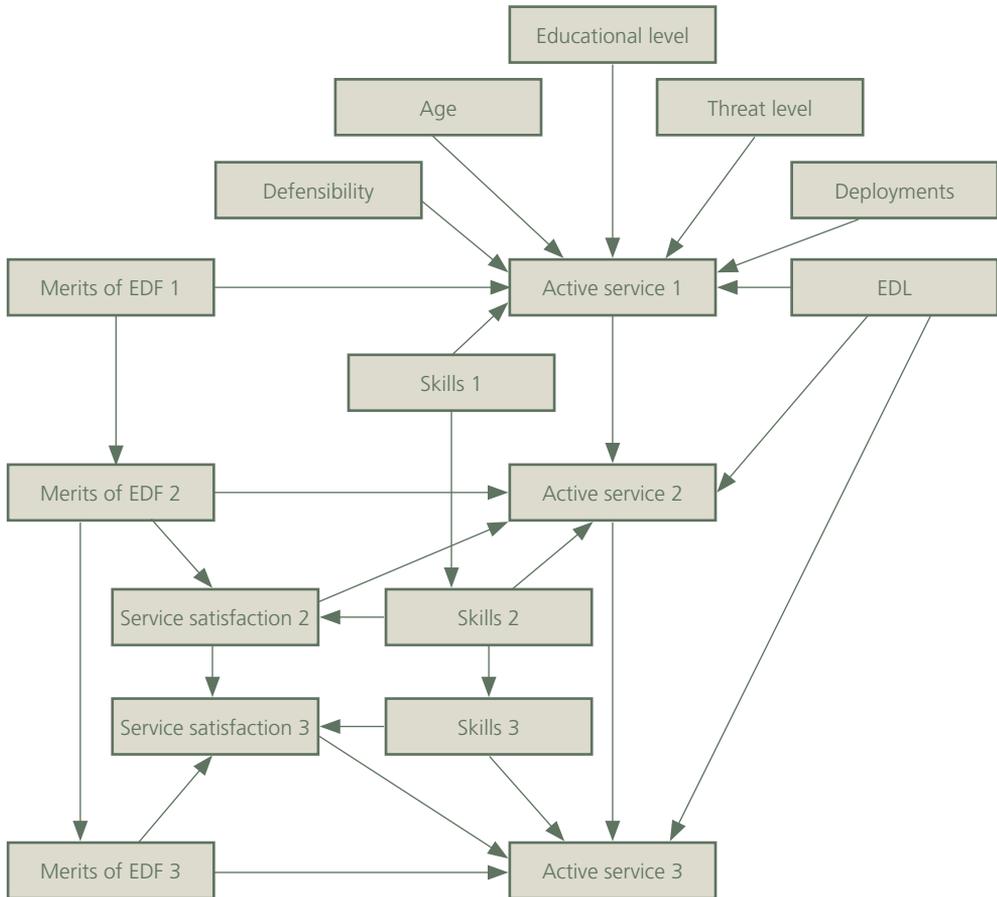
The *expected skills* index was based on 7 items measuring the skills that the conscripts expected to obtain during their service period: car driving, leadership, planning, survival, IT, first aid and language skills. The items were rated on a 3-point scale (1 = Yes, definitely, 2 = Yes, 3 = No, not this). The skills expected or acquired were measured in each wave of the survey and included the same lists of skills each time.

Satisfaction with service was measured by the question “How satisfied are you with your service?” on 4-point scale (1 = Satisfied to 4 = Not satisfied). This question was posed in the second and third survey waves.

2.3 Statistical analysis

We applied structural equation modelling (Blunch, 2013; Byrne, 2016) to test our model with regard to the effects of individual characteristics (age, education), defence-related attitudes, and expectations and experiences with conscript service on the conscripts’ intention to join the active service. Figure 1 represents the conceptual model of the estimated paths between the variables.

Figure 1:
Conceptual
SEM model
(error variables
not included)



The analysis of the suggested model proceeded by applying the following steps. Firstly, we estimated the effect of the following factors (exogenous variables): socio-demographic variables (age, education and involvement in the EDL), defence related attitudes, merits of the EDF and expected skills on the behavioural intention to join active service at the beginning of the conscript service. We assumed that the intention to join active service at the beginning of the conscript service is related to the same intention in the middle of the service. The intention to join active service in the middle of the conscript service is also influenced by the following factors: the expected skills measured in the middle of the service, the perceived merits of the EDF in the middle of the service, and satisfaction with the service so far. Moreover, the expected skills in the middle of the service are influenced by the expected skills in the beginning of the service, and will themselves influence the expected skills at the end of the service. The similar paths are drawn between the

merits of the EDF at the three points in time when the survey was conducted. We also expected that satisfaction with the service is influenced by expected skills to be acquired and the merits of the EDF. In the conceptual model (Figure 1) we do not show the covariances of exogenous variables or errors in endogenous variables, but they are included in the statistical models. Moreover, based on the preliminary analysis and findings by Lievens et al. (2005), showing that the more familiar one is with military organizations, the more attractive the military as employer becomes, we decided to apply multi-group structural equation modelling in two groups of conscripts separated by their former connections with the EDF. We tested the invariance of models on several levels: with respect to structural paths, structural weights, structural covariances and structural residuals.

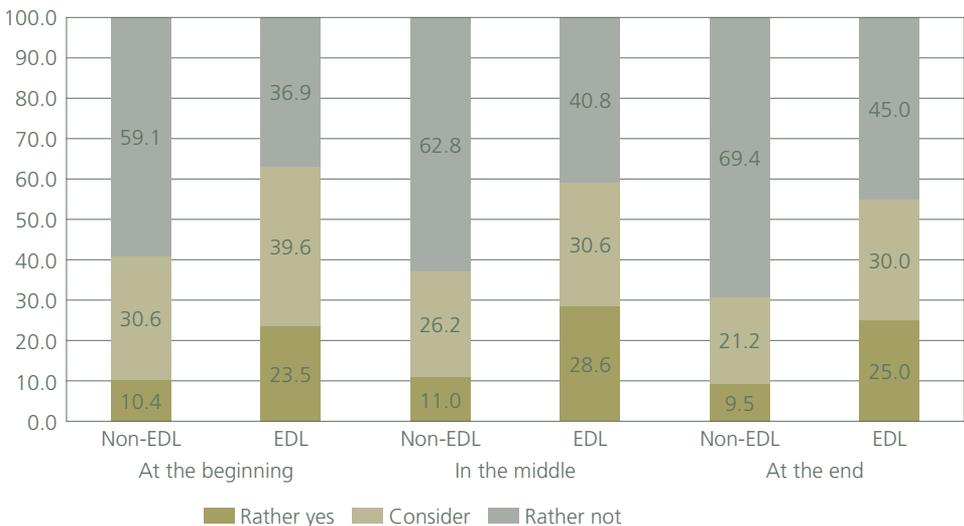
IBM SPSS Statistics 24 and Amos 24 were used for our analyses.

3. RESULTS

3.1 Descriptive analysis

Joining the active service is not a very popular option among conscripts; the proportion of those who definitely or probably would become an active service member is approximately 12% and remains stable over the course of the service. However, the intention to join the active service is clearly related to previous military-type experience – whether the conscript had taken part in the activities of the EDF or its youth organizations (about 22% of the sample) or not. The proportion of conscripts who intend to join the active service is 23% in conscripts with an EDL background, compared to 10% in conscripts with no EDL background (see Figure 2). Interestingly the positive intention is relatively stable between both groups. In contrast, the proportion of those who would consider the

Figure 2: Conscripts' behavioural intention towards active service depending on their connection with EDF at the beginning, in the middle and at the end of their conscript service (%).



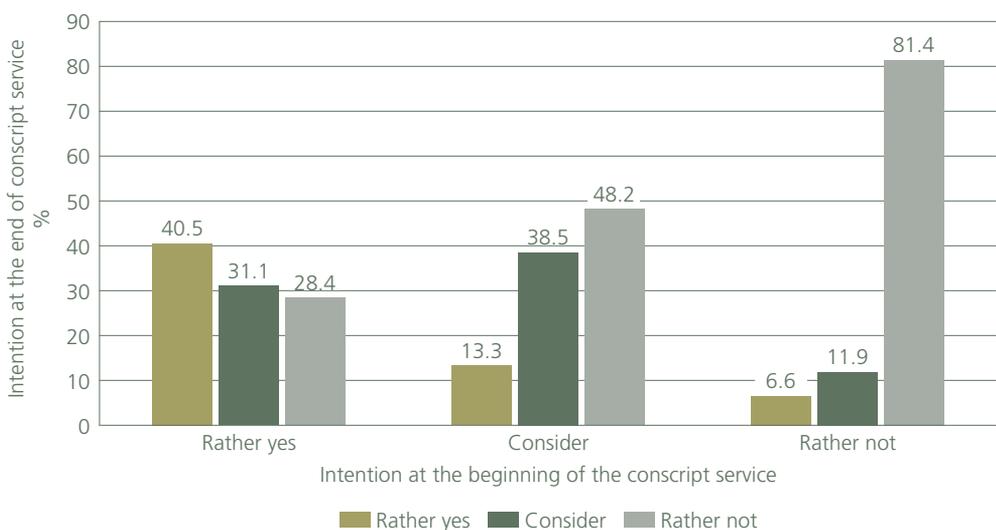
active service opportunity depending on circumstances decreases over the service period, which means that the proportion of those who definitely do not consider active service as a viable life-path will increase during the service.

Looking in more detail at the stability of the intent to join active service, and comparing the answers to the question about whether or not one would consider the professional military as a career option in the first and third survey wave, we see that the answers tended to change over the course of the conscription period. Only 40.5% of those conscripts who indicated in the first survey wave that they would definitely or probably consider becoming active service members continued to hold this attitude for the duration of their service period (see Figure 3). One third of those who definitely or probably considered becoming active service members in the first wave had become less interested in a military career, and 28% had come to the conclusion that active service is not something that they would choose. The proportion of fixed/stable intentions in those conscripts who would consider a career in the military at the beginning of their service is 38.5%. The conscripts who would not consider the military as a career option, among them the proportion with a stable intention, is 81% for the duration of their service period. This clearly indicates that a positive intention towards choosing the military as one's career is more likely to change during the service period, and could be influenced by different factors.

3.2 Multi-group structural equation model of active service intention

We constructed a model of the intent to choose active service according to the conceptual model in Figure 1. We estimated the path coefficients, their statistical significance, and other relevant parameters separately (unconstrained for equality) for the two groups; for the conscripts who had had prior experience with the EDL

Figure 3:
The paths of intention to join active service during the conscript service (% of intention at the end of conscript service across I wave intention)



and the conscripts who had had no experience with the EDL. Next, we considered the question of model fit, and tested whether the EDL group and the non-EDL group differ from each other with regard to the investigated associations between the effect of socio-demographic background characteristics and defence-related attitudes, and on the behavioural intent to join the active service.

In the case of conscripts who had had no prior experience with the EDL at the beginning of their service, the skills they expected to acquire during their service period and the merits of the EDF had a significant positive effect on their intent to join active service (see Table 1). Nevertheless, these factors did not significantly influence the intention of conscripts who were previously connected to EDL activities to join the active service. Their intention to join active service was affected by their age, and their attitude towards Estonia's ability to defend itself. In the middle of the service, the most important determinants of the intention to continue as a career service member are the merits of the EDF and satisfaction with the conscript service. Furthermore, we can see the effect of path dependency; the intention to join the active service at the beginning of the service has a quite significant positive effect on the intention in the middle of the service, which in turn influences the intention to join the active service at the end of the service. This path is especially important for those conscripts who had had previous experience with EDL activities. The path of the conscripts previously involved with the EDL is a bit surer than for others.

At the end of service, the intention to join the active service is also affected by satisfaction with conscript service, particularly among conscripts with no EDL experience. For those who had not had any prior experience with the EDL, the skills actually obtained during conscript service had an impact on their intent to consider becoming an active service member.

Our results indicate that during conscription different factors influenced the behavioural intention to join the active service between those conscripts who had had experiences with EDL and those who had not had any such experiences. Experiences with military-type organizations prior to becoming a conscript are important, but we also established that there are characteristics that stem from the nature and course of conscription which play a role in the intent to join active service, meaning that conscription is an important process for shaping the active-duty force.

Table 1:
Path
coefficients of
the model of
active service
intention for
conscripts with
and without
experience
in the EDL
(n=713)

Paths	No connection with EDL (n=553)		Previous connection with EDL (n=160)	
	Estimate	S.E	Estimate	S.E
Deployments → Active service1	0.16**	0.06	0.21	0.13
Defensibility → Active service1	0.08	0.06	0.36**	0.13
Threat level → Active service1	0.08*	0.04	-0.01	0.08
Age → Active service1	-0.02	0.03	0.13*	0.06
Education → Active service1	0.26**	0.08	0.01	0.18
Merits of EDF1 → Active service1	0.34***	0.07	0.18	0.16
Merits of EDF2 → Active service2	0.24***	0.06	0.33*	0.14
Merits of EDF3 → Active service3	0.10	0.06	-0.11	0.11
Skills1 → Active service1	0.48***	0.10	0.02	0.22
Skills2 → Active service2	0.17*	0.08	0.12	0.18
Skills3 → Active service3	0.27**	0.09	0.83***	0.17
Service satisfaction2 → Active service2	0.22***	0.06	0.36**	0.13
Service satisfaction3 → Active service3	0.21***	0.06	0.32**	0.12
Active service1 → Active service2	0.46***	0.04	0.58***	0.07
Active service2 → Active service3	0.49***	0.04	0.51***	0.06
Merits of EDF1 → Merits of EDF2	0.67***	0.04	0.54***	0.07
Merits of EDF2 → Merits of EDF3	0.60***	0.04	0.77***	0.07
Skills1 → Skills2	0.32***	0.04	0.23**	0.08
Skills2 → Skills3	0.49***	0.04	0.51***	0.07
Service satisfaction2 → Service satisfaction3	0.27***	0.04	0.22**	0.07
Merits of EDF2 → Service satisfaction2	0.50***	0.04	0.68***	0.07
Merits of EDF3 → Service satisfaction3	0.46***	0.04	0.45***	0.07
Skills2 → Service satisfaction2	0.37***	0.06	0.28**	0.11
Skills3 → Service satisfaction3	0.27***	0.06	0.32**	0.12

In the next step, we analyzed the model fit of the unconstrained model (including all conscripts; all model effects were estimated for the two groups separately). Based on model fit indicators, firstly we can conclude that the unconstrained model quite adequately fits our data (RMSEA=0.066; CFI=0.861 with $\chi^2=621.2$, $df=150$, $p<0,0005$; $\chi^2/df=4.14$). Secondly, we constrained the structural path coefficients (structural weights) to be equal across the groups and tested whether the model fit would differ significantly from the model without this constraint (indicating EDL-group differences in structural paths) or whether it would differ to a non-significant extent (showing that the paths can be “made equal” without losing model fit, and indicating

that the paths do not differ between those conscripts with EDL experience and those without it). The results yielded nearly the same fit (RMSEA=0.063; CFI=0.854 with $\chi^2=667.7$, $df=174$, $p<0,0005$; $\chi^2/df=3.84$). But still the increase in χ^2 is significant in comparison to the differences in model fit to the unconstrained model ($\Delta\chi^2=46.5$, $\Delta df=24$, $p=0.004$). In the next steps, we also tested the invariance of the model with respect to intercepts, covariances and residuals in the two groups considered, and got remarkably worse fit statistics than described above. Hence, the variables included in the model have different effects on the behavioural intention to join active service among conscripts in the two groups analyzed.

4 DISCUSSION

The question of human resources in the military system has existed for as long as there have been militaries. A wide range of studies have focused on the question of military propensity in the process of recruitment (e.g. (Bachman et al., 1998, 2000, Kleykamp 2006, Lagree et al 2000, Woodruff 2017). However, these studies have mostly focused on volunteer-based armies. In this study, we focused on the question of how military propensity (the intention to join active service) is affected by compulsory military service. We explored how military propensity changed during compulsory military service, and whether it was influenced by personal characteristics (socio-demographic factors and attitudes) or conscript-related characteristics (satisfaction, skills, and merits). The findings support two broad conclusions. Firstly, during conscription, a positive intention to join the active service will change more than the intention not to join, and rather towards not joining the active service. Secondly, the intention to join the active service in both conscripts who have a previous EDL connection and those who do not is influenced by different characteristics during service.

The first main conclusion evokes the question “why?” – why does military propensity in our sample decrease during conscription? We argue that quite often, during conscript service, an instrumental learning approach is applied. In conscript service, one of the goals is to ingrain as many military values as possible in the conscripts, who are embedded in the context of military culture, characterized by discipline, hierarchy, order, notions of patriotism, honour, loyalty, integrity and sacrifice (Olsthoorn, 2010; Rahbek-Clemmensen et al., 2012). At the same time, this process means a strong socialization to conform to the values and behaviour of the organization/system. To achieve this desired behaviour, both positive reinforcement and punishment are applied. Our previous analysis showed that, in the middle of the service, the conscripts’ fears are associated with the feeling that they will let the group or squad down and that this will be followed by the entire collective being assigned to a compulsory task – i.e. to a certain extent, we could see an orientation towards evading punishment (Talves and Truusa, 2017).

Our results indicate that conscripts who have had a previous connection with the EDL have higher military propensity, and they are more likely to maintain their

intention to join active service than conscripts who lack an EDL background. This is consistent with the findings of Lievens et al. (2005), who stressed the association between a familiarity with military organizations and the attraction of a military organization as employer. Also, it revealed that in the case of conscripts with an EDL background, the merits of the EDF and expected skills do not have significant influence on intention; however, there was a strong association between acquired skills and intention at the end of the service. This is in line with the theoretical approach of the social learning concept of self-efficacy. Those conscripts who feel that they have acquired EDF specific skills are more favourably disposed to active service. However, self-efficacy is not so visible in the case of conscripts who have a non-EDL background. Interestingly, for the non-EDL background conscripts, the driving force behind an intention to join the active service is the merits of the EDF, which are also associated with service satisfaction and the intrinsic motivation of patriotism. The merits of the EDF could also be seen as a proxy for pride and EDF-related prestige. In previous studies, pride has been seen as one of the leading positive factors for remaining in service (Moore, 2002), and it appears that it could also be seen as a positive factor for joining active service. To sum up, our findings are in accordance with the task approach skills component in the SLTCMD model. This means that depending on different backgrounds – EDL vs non-EDL – experiences in the conscript service have a different impact on the intention to join the active service.

Finally, some limitations should be acknowledged. Firstly, in our conceptual model and analysis for predicting intentions during conscript service, we included few socio-demographic background variables. However, previous studies have shown that voluntary military enlistment is associated with lower socio-economic status, living in an area with a high military presence (Kleykamp, 2006), and parental characteristics (Legree et al 2000). These aspects should therefore be considered in further analysis. Moreover, the analysis on the basis of the ECS indicated that satisfaction with service is associated with the perceived attitude from partners, parents and peers towards conscript service (Raid et. al 2018, forthcoming). Thus it could be expected that the influence of parents, partners and peers should be taken into account also in the case of military propensity. It would be also in accordance with the framework of the Theory of Planned Behaviour, which holds that behavioural intention is influenced by perceived social norms, which could be operationalized as the attitudes of significant others.

The second limitation relates to the generalizability of our results. Our study was conducted during conscript service in the EDF. We do not claim that these findings are universal for other societies with compulsory military service, especially the associations between different characteristics and behavioural intention. Compulsory military services are diverse according to the duration, retention rate and proportion of volunteers in different countries (Cronberg 2006), which may affect the influence of conscription-related factors on intention to join active service. However, we

believe that our study highlights the importance of taking into account the effect of conscript service on the process of recruitment of active service members.

Conclusion Various studies (Woodruff, 2017; Yi-Ming Yu, 2015) indicate that the purely occupational model with mostly extrinsic goals for becoming active service members is less desirable for the military in the long run. Our results align with these findings and confirm that those with previous familiarity with military culture and organization, and those who pursue more intrinsic goals (patriotism and acquiring skills) during their conscription service, are more likely to consider the military as a career option. These results are also important to consider in the context of reserve-based armies. Although the main emphasis of this article is geared towards understanding conscription in the context of recruiting active service members, the ultimate goal is to train people who would be motivated and capable of defending their nation if such a need should arise. Laanepere et al. (2018, forthcoming) theorize that reservists who have contextualised their conscript period as time well spent obtaining useful skills, and have conceptualized the merits of the armed forces that they are a part of, would also have higher motivation when performing their reserve duties.

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Appendix 1:
Covariances
between
exogeneous
variables of
the model of
active service
intention for
conscripts with
and without
experience in
EDL (n=713)

Covariances				
Merits of EDF1 ↔ Skills1	0.11***	0.01	0.13***	0.03
Deployments ↔ Merits of EDF1	0.20***	0.03	0.03***	0.06
Defensibility ↔ Skills1	0.05***	0.02	0.09**	0.03
Deployments ↔ Skills1	0.05***	0.02	0.07*	0.03
Deployments ↔ Defensibility	0.24***	0.03	0.27***	0.07
Defensibility ↔ Merits of EDF1	0.23***	0.03	0.33***	0.06
Defensibility ↔ Threat level	0.06	0.04	0.01	0.08
Deployments ↔ Threat level	0.21***	0.04	0.46***	0.09
Threat level ↔ Skills1	0.06**	0.02	0.11**	0.04
Threat level ↔ Merits of EDF1	0.09**	0.04	0.27***	0.07
Deployments ↔ age	0.14*	0.06	0.44***	0.11
Defensibility ↔ age	0.18***	0.06	0.14	0.11
Threat level ↔ age	0.08	0.08	0.35*	0.15
Age ↔ Skills1	0.05	0.03	0.18***	0.06
Age ↔ Merits of EDF1	0.21***	0.05	0.23*	0.09
Age ↔ Education	0.04	0.04	-0.13*	0.06
Deployments ↔ Education	-0.05**	0.02	-0.01	0.03
Defensibility ↔ Education	-0.02	0.02	0.02	0.03
Threat level ↔ Education	0.05	0.03	0.01	0.04
Education ↔ Skills1	0.01	0.01	0.01	0.02
Education ↔ Merits of EDF1	0.04**	0.02	-0.01	0.03

James Griffith

PROSTOVOLJNO POPOLNJEVANJE V ZDA: NOVE (IN POGOSTO NEPREDVIDENE) TEŽAVE S PRIDOBIVANJEM IN ZADRŽEVANJEM KADRA TER NJEGOVO PRIPRAVLJENOSTJO

THE UNITED STATES ALL-VOLUNTEER FORCE: EMERGING (AND OFTEN UNANTICIPATED) ISSUES OF RECRUITMENT, RETENTION, AND READINESS

Povzetek Po drugi svetovni vojni so se oborožene sile ZDA popolnjevale z vpoklicem ali obveznim služenjem vojaškega roka za fante. Ta praksa se je končala leta 1973 z uvedbo prostovoljnega popolnjevanja (All-Volunteer Force – AVF). Uvedba AVF pa je prinesla več novih izzivov, vključno z ustreznim pridobivanjem in zadrževanjem vojaškega kadra. Sčasoma je bilo treba sprejeti več prosilcev, saj se je pridobivanje kadra zmanjšalo. Bilo je manj zainteresiranih in ustreznih prosilcev, od teh pa še manj tistih, ki so ustrezali standardom. Ob uvedbi sprememb v nacionalni obrambni politiki in zaradi sodelovanja ZDA v nedavnih bojnih operacijah večjega obsega je prišlo do pomanjkanja pripravljenosti na področju pridobivanja in zadrževanja kadra. Nezadovoljiva pripravljenost se je najbolj kazala v rezervni sestavi, na kar se v tem članku tudi osredotočamo. S pomočjo opisa teh dogodkov prikazujemo medsebojno povezanost med pridobivanjem in zadrževanjem kadra ter pripravljenostjo, pri čemer kažemo na potrebo po bolj preudarnem razmisleku o tem, kako se vsak izmed njih izvaja, še zlasti v okviru AVF. Teorija identitete ponuja načine za razumevanje in razvijanje takih vrst vojaškega kadra, ki je potreben za lažje pridobivanje, zadrževanje in pripravo kadra.

Ključne besede *Vpoklic, obvezno služenje vojaškega roka, prostovoljno popolnjevanje, All-Volunteer Force – AVF, pridobivanje kadra, zadrževanje kadra, pripravljenost.*

Abstract After World War II “the draft”, or compulsory military service of young men, staffed U.S. forces. This practice ended in 1973 with the introduction of the All-Volunteer Force (AVF). However, staffing the AVF introduced several new challenges, including the adequate recruitment and retention of military personnel. Over time, more applicants had to be taken, as recruitment fell short. There were fewer interested and eligible applicants, and of these, even fewer who met the standards. A lack of readiness

relating to both recruitment and retention became apparent as changes occurred in the national defense policy and the U.S.'s participation in recent large-scale combat operations. Inadequacies in readiness were most evident among the reserve forces – the focus of this paper. Through the description of these events, the inter-relationships between recruitment, retention, and readiness are demonstrated, pointing to the need for more deliberate thought with regard to how each is implemented, especially in the context of the AVF. Identity theory offers ways to understand and to develop the kinds of military personnel needed to better recruit, retain, and ready personnel.

Key words *Draft, compulsory military service, All-Volunteer Force, recruitment, retention, readiness*

Introduction This article discusses the topics of recruitment, retention, and readiness relative to the All-Volunteer Force (AVF), largely in the U.S. Army reserves.

DEFINITION OF PERSONNEL TOPICS

Before the main presentation, it is important to define the terms used. *Recruitment* is the process of “analyzing the requirements of a job, *attracting employees to that job, screening and selecting applicants, hiring, and integrating the new employee into the organization ... in a timely and cost effective manner*” (definitions taken from the *Business Dictionary*, 2017). In the U.S. military, personnel are organized into units depending on the unit's missions. Personnel have varied skill requirements determined by what they are to do, called military occupational specialties (MOS). Recruits undergo training of various lengths depending on the complexities of job skills specific to each MOS. *Retention* is the effort put forth by an organization “to maintain a working environment which supports the *current staff to remain with the company*. Many employee retention policies are aimed at addressing the various needs of employees to enhance their job satisfaction and reduce the substantial costs involved in hiring and training new staff.” *Readiness* is the extent to which the recruited and trained individuals are prepared to successfully perform their assigned duties and tasks, both individually and cooperatively. The U.S. Army defines readiness largely in terms of units – company-sized and battalion-sized – as “the ability of a unit to perform as designed” (Dabbieri, 1991). Thus, readiness is the extent to which the combined personnel can perform the missions required of their unit. Doctrinally, readiness is indicated by how well the unit measures up in four areas: personnel, equipment on hand, equipment serviceability, and training to meet mission-essential tasks (METL; Department of the Army, 2003).

The topics of recruitment, retention, and readiness, while ever-present for military forces, are most salient in a volunteer force. There are no longer a multitude of “eligibles” from which to select (e.g. the U.S. drafted 20 million youth during the Vietnam War and a mere 2% were taken). Rather, youth must now show an interest

in joining and meet physical and mental requirements. At present in the U.S., that numbers only about 400,000 per year, from whom about half are selected.

BACKGROUND

In 1973, the U.S. military shifted from compulsory service to voluntary service. The personnel implications of this change were not fully understood until combat operations in the First Gulf War and the more recent operations in Iraq and Afghanistan. The most striking implications were evident in recruitment, retention, and readiness, which have become inseparably linked. One cannot speak about recruitment without including retention, and in turn, readiness. For example, high attrition among young soldiers means recruitment efforts must increase, and in the absence of qualified volunteer recruits, the military may take youth who become less than adequate personnel or less ready.

The purpose of this paper is, first, to make distinctions among these three topics, and second, to illustrate their inter-relationships through examples during the U.S. military's shift from the draft to the AVF. The discussion focuses on the Army reserves, where the implications of this shift in recruitment, retention, and readiness have been most noticeable. Of the reserves, the largest is the Army reserve – consisting of the Army Reserve (USAR) and the Army National Guard (ARNG). In 2017, the USAR is nationally organized and numbers about 200,000, and the ARNG consists of the States' militias and numbers about 350,000 uniformed personnel.

1 ALL-VOLUNTEER FORCE AND NEW CHALLENGES

1.1 Recruitment

From World War II through the ending stages of the Vietnam War, the U.S. obtained its personnel largely through “the draft,” or compulsory service (usually 2 years) for all males aged 18 years through 26 (Hershey, 1960). Some youth deferred the draft by attending college, by having an exclusionary medical condition, or by having particularly needed civilian occupational skills. African-Americans were disproportionately among the poor and were unable to attend college, and thus were nearly always subject to the draft. During the Vietnam War, African-Americans became over-represented among draftees, and this imbalance meant African-Americans had higher casualty rates. In 1965, nearly one out of every four combat deaths were African-American (Westheider, 1997). Lacking recruits during the later stages of the Vietnam War, Project 100,000 was implemented, lowering draft standards so that poor youth could acquire job skill training in the military (Appy, 2003). African-Americans, being disproportionately among those lacking employment and job skills, were again represented disproportionately highly. From 1966 through 1969, a quarter of a million personnel were recruited and many were African-American – 41%, compared to 11% of the population of the U.S. (Maycock,

2001). These facts added to the growing unpopularity of the war, by pointing out the inequities between those who served and those who did not (Armor, 1996; Mershon & Schlossman, 1998).

The Vietnam War was costly in human lives. In the end the war resulted in about 58,000 fatalities, with another 300,600 wounded (Global Security Organization, 2017; National Archives, 2017). Numerous domestic protests and uprisings occurred. Nixon, the elected President in 1968, promised to end the Vietnam War. To reduce the gross inequities regarding who was drafted and who was not, in 1972 the Nixon administration proposed a lottery for the draft. One year later, the draft ended. Thereafter, the U.S. military had to staff its force through volunteers. The immediate challenges in the AVF expected by policymakers did not occur. Many predicted a force of mercenaries, comprised of the poor, African-American, and uneducated (Rostker, 2006).

Clearly, a major concern was whether enough youth would join military service each year to achieve the quotas necessary to staff units. Generally, the U.S. military has successfully recruited youth for military service by offering several incentives. Among the stronger incentives attracting youth have been: receiving money; going through experiences associated with self-development (e.g. becoming more mature, responsible, or disciplined); and gaining job skills transferable to civilian jobs. The success of these incentives in part resulted from a systematic study of the likelihood of youth joining and their stated reasons. In the 1980s, the Army commenced a research program, the Army Communications Objectives Measurement Study (ACOMS), which spanned several years. The study involved large-scale periodic samples of young adults, asking the likelihood of their joining (called propensity) and reasons for joining. The findings informed content for advertisements and recruitment incentive programs.

1.1.1 Fewer applicants

Despite these successes, the U.S. military has had problems in recruiting sufficient numbers of personnel, during the past decade in particular (Balli, 2016). The difficulty, in part, was due to fewer and fewer youth being eligible for military service, and specifically, the growing problem of obesity. At present, approximately one in five youth are overweight (Feldman, 2018, p. 273). Difficulties in recruitment were especially evident during the recent wars in Iraq and Afghanistan. The more combat operations could be seen as necessary and serving the broad interests of the U.S., the more youth explored military service. After 9/11, many initially volunteered. But, as the wars in Iraq and Afghanistan continued with accumulating casualties, fewer were interested in serving. In fact, several services have had difficulties meeting their annual quotas for enlistments. To meet shortfalls, several methods have been used, such as “stop-loss”, where personnel had to remain in military service beyond their obligations, increased bonus money for enlisting or re-enlisting, and lowering entry standards. Armor and Gilroy (2010) reported that beginning in 2005 there was a slight increase in Category IV recruits (derived from the Armed Services Vocational

Aptitude Battery, ASVAB¹), and an even larger increase in Category IIIB recruits in the Army. The increases in both categories are most probably explained by the need for military personnel during the Iraq War.

1.1.2 More unfit applicants

During 2004-2006, applicants with misdemeanors, behavioral health conditions, weight issues, and so on were allowed to join so that the size of the U.S. Army increased (Lipscomb, 2015). Gallaway et al. (2013) examined Army soldiers who had been granted enlistment waivers from 2003 to 2008. Most waivers were either medical or misconduct waivers. The percentage of soldiers who were granted medical and conduct waivers increased significantly from 2003 (12%) to 2008 (20%), with the largest increase occurring in the percentage of moral conduct waivers. Similar trends were observed in the ARNG (ARNG, 2015). Griffith and Bryan (2016) proposed that these trends, in part, explain the increased vulnerability of recruits to suicide. Clearly, taking on such youth has implications for readiness, discussed at a later point in this paper.

1.1.3 Fewer veterans

During World War II, about 9% of the U.S. population served in the military. This dropped to 2% during the Korean and Vietnam Wars. In 1970, 13.8% of the U.S. population were veterans, dropping to 7% in 2010 (NPR, 2011). During the First Gulf War less than 1% served, and now after the Iraq and Afghanistan Wars, less than 0.5% of the U.S. population has served in the military (Liebert & Golby, 2017). These declines are, in part, the result of a smaller military force. In 2010, the U.S. armed forces numbered about 1,500,000, dropping more than by a half since the height of the Vietnam War, i.e. 3,500,000 in 1967 (National Public Radio, 2011).

Having fewer veterans in the general population does not bode well for enlistment. Veterans often served as sources of information and referral for those youth who were interested in military service. Young people's contact with veterans diminished, having negative effects on recruitment. Youth interested in military service are far more likely to join (twice as likely) if they have a relative who served (cited in Liebert & Golby, 2017). Also, inadequate numbers of youth being interested in military service likely has to do with misconceptions (Vander Brook, 2017a). Few know the differences among the various military services – Army, Navy, Air Force, and Marines – and the demands of each. Additionally, youth believe most that join will fight in combat, even when the ratio of support to combat personnel is about 10 to 1.

In the last few years, the Army has barely met its annual recruitment goals (Balli, 2016); goals were met only allowing for waivers and changes in admittance criteria. The Army is implementing a new 5-part physical fitness test, called the occupational physical assessment, which considers standards for less physically demanding military jobs (Vander Brook, 2017a). Waivers have also been increasingly allowed. Past mental health conditions which were previously disqualifying (such as self-harm,

bipolar disorder, depression, and drug and alcohol abuse) are no longer disqualifying (Vander Brook, 2017b). Military mental health professionals, however, have expressed some concerns about such waivers (Vander Brook, 2017b). Additionally, proportionally more applicants are allowed to score lower on the ASVAB¹ – going from 0.6% of applicants recruited in 2016 falling in the second to lowest mental category (Category IV) to 1.9% in 2017. In 2017, the standard was relaxed to 4% of all recruits (Vander Brook, 2017b).

1.1.4 Representativeness

A final concern was whether the AVF could recruit a force from “all walks of life.” Policymakers aspired to achieve a force that proportionally represented race/ethnicity and socioeconomic status. Military sociologists and others argued that representation was critical to the legitimacy and credibility of the military within American democracy (Janowitz, 1998). At the start of the AVF, many thought few African-Americans would volunteer, due to the inequities of the draft and the fact that African-Americans were over-represented in the casualties of the Vietnam War. Another concern was that the U.S. military would become a mercenary force, comprised of the poor, African-Americans, and the uneducated (Rostker, 2006). Studies of “social representation” were instituted, which monitored percentages of various racial/ethnic groups who served in the U.S. military (see Congressional Budget Office, 1989).

Early on, African-Americans volunteered for military service more than expected (Levy, 1998). In 1972, African-American representation in the U.S. military had increased from 11% in 1972, proportional to their occurrence in the general population, to 30% by the mid-1980s. In the early 1980s, the percentage of African-Americans among non-prior service enlistees was about 20%, and remained so until about 2000. During the First Gulf War, African-Americans comprised a large proportion of the U.S. military – upwards of 20% (Buckley, 2001). However, after 1991, African-American enlistments declined. Since 2000, among non-prior service entrants, rates for African-Americans have declined, from 24% in 2000 to 14% in 2005. A sharp drop also occurred in 2002 and continued up to 2006, when African-American non-prior service enlistments fell to their lowest level since the AVF started (Armor & Gilroy, 2010; Segal & Segal, 2005). Slight increases in African-American enlistments occurred in 2007 and 2008 (Armor & Gilroy, 2010).

A recent Department of Army report reported further declines in African-Americans. Fewer African-Americans and more white Americans have entered military service, in particular in the Army. From 1995 to 2009, the percentage of African-American enlisted soldiers has decreased from 27% to 20% in the active component Army, and from 16% to 13% in the ARNG. Conversely, the percentage of white enlisted soldiers has increased from 62% to 63% (Department of the Army, 2006). Over the last decade, government-sponsored reports of “social representation” of the U.S. military have been scarce. Other analyses have shown additional trends. The bulk of recruits come from the South-Eastern U.S., followed by the West South Central

U.S. and East South Central U.S. (Bender, Kiersz, & Rosen, 2014) In 2013, 44% of military recruits came from the South-Eastern U.S., compared to 36% of the U.S.'s 18 to 24 year-old civilian population. These regional differences in enlistment are largely associated with socio-demographic differences (Maley & Hawkins, 2017). Relative to the rest of the U.S., Liebert and Golby (2017) reported that there are fewer college graduates and a prominent presence of Evangelical Christians in the South-Eastern U.S. and South Central U.S. They speculated that the regionalization of recruits would continue and likely increase in the future.

1.2 Retention

Personnel loss during the military service obligation period (often called attrition) is expected. Too, after the obligatory service period personnel loss is expected, while some personnel to stay (often called retention) is expected. Great losses by way of attrition or retention weigh heavily on both a compulsory force and a volunteer force. When personnel losses are high (as in the cases cited below), the burden is having to recruit many more volunteers to serve. A draft force can recruit from its youth population, but a volunteer force must recoup excessive losses in recruitment of volunteers, especially among more junior-ranking service members. The pyramid structure of personnel seniority means that many personnel could leave, but some had to stay, in particular, those who would advance and become tomorrow's leaders –sergeants and company-grade and field officers. Factors often associated with attrition and retention relate directly to individual and unit functioning. For example, some leave feeling inadequately equipped or prepared to perform their military duties. Thus, the topic of attrition and retention is important for readiness both in a compulsory force and a volunteer force. The topic of readiness is discussed in a later section.

1.2.1 USAR junior-ranking enlisted

In the AVF, there were a few occasions where the retention of personnel became critical. The first was in the late 1980s, when recently trained enlisted USAR and ARNG soldiers stopped coming to monthly drill assemblies. Once a month over a weekend, soldiers were obligated to perform military service. On that weekend, each weekend day comprised 2 drill assemblies (a total of four "drill assemblies"). When a soldier missed 9 consecutive assemblies, the soldier was dropped from the personnel list, called an "unsatisfactory participant." In 1989, the USAR reported about 43,000 such losses. This represented an 18% to 20% loss of the total USAR drilling population. The losses were by and large first-term lower-ranking enlisted personnel, who stopped attending assemblies before the end of their military service obligation – usually 4 years. At that time, the cost of recruiting and training a soldier was \$40,000 in 1990 dollars (or \$75,000 in current dollars), and this represented approximately \$1.71 billion in 1989. Aside from the financial costs, having such losses and high personnel turnover meant that the reserve force was less ready. This was especially troublesome since the Army reserve component became a crucial element of the Total Force policy (Carafano, 2005). This policy downsized the active

component of the Army and shifted many support and service functions to the Army reserve. The policy also meant that in times of large-scale combat operations the ARNG complemented the active force's combat arms units. A series of studies were commissioned to better understand the losses of the USAR (e.g. Perry, Griffith, & White, 1991).

Policymakers and military leaders believed the losses were due to external demands placed on soldiers, which competed with their military service. These included civilian employment and family obligations. Studies showed, however, that those who left were generally first-term enlistees who were young, unmarried, and not in full-time employment (Perry et al., 1991). The soldiers' stated reasons for leaving centered on not having worthwhile and meaningful work. Lacking funds, there were shortages in individual and unit equipment, training, and field exercises. The soldiers also reported little supervision during weekend drills, little recognition, and unit leaders who did not look out for their interests, etc. These issues were evident when the reserves were mobilized for the First Gulf War, which was the first real test of the Total Force (discussed below under the topic of readiness).

1.2.2 Army mid-level officers

Starting in the early 2000s, junior officers began to leave military service at a high rate (Coates, Silvernail, Fulton, & Ivanitskava, 2011). To illustrate, about 72% of the 1999 class of West Point military academy remained in military service 5 years later; the previous year it had been 78%. In the class of 2000, retention rates fell to about 66% after the 5-year initial commitment. Declining retention rates have also occurred among those junior officers receiving commissions elsewhere (Barno & Bensahel, 2015). A Government Accountability Office (GAO) report (GAO, 2007) described the Army's need for a strategic plan to address its emerging officer personnel challenges. The report projected that the Army would most probably need to have about 3,000 or new officers each year from 2008 to 2011. Retention of early career officers was also lowest for the Army, particularly junior officers who graduated from the U.S. Military Academy (USMA) or received Reserve Officer Training Candidate (ROTC) scholarships. At the same time, the Army has had a shortfall of mid-level officers (GAO, 2007).

One of the major reasons for leaving cited by officers was the burden of administrative requirements, at times taking more time than training itself (Matthews, 2015). Also, the training required by regulations often had little relationship to wartime missions. Junior officers were frustrated by the lack of quality of their peers and superiors. Other officers named the lack of quality of life due to repeated deployments, and still others wanted to return to graduate education (Shanker, 2006). Evaluating the Army Captain Retention Program, Coates et al. (2011) found that monetary incentives or cash were the most relevant factor in keeping Captains from leaving. Earlier officer groups (1999-2003) were more likely than later officer groups (2004-2005) to accept monetary incentives. Coates et al. observed, however, that such incentives retained the less qualified rather than the more qualified candidates. Others have proposed

less committed, “occupational” officers take such incentives (Heinecken, 2009) and this likely has implications for readiness (discussed below).

In summary, the examples here show that personnel losses, either by attrition or retention, is an issue for militaries relying on either compulsory service or voluntary service. To a large extent, the factors associated with leaving military service have to do not only with monetary incentives, but equally if not more importantly, having military experiences that meet personnel’s expectations for military service. Unexpected personnel losses of junior-ranking enlisted and junior officers (as described above) illustrated that retaining personnel was associated with unit activities that provide military experiences, particularly those that prepare personnel for mobilization, deployment, and potentially hostile environments (Vaughan & Schum, 2002). Staying for military experiences and reports of quality unit experiences were associated most with intentions to re-enlist in a sample of the ARNG (Griffith, 1995). Unit activities – such as quality training and unit leadership; skilled soldiers; camaraderie between soldiers; and confidence in the combat performance of soldiers, leaders, and equipment – have been previously associated with retention, preparedness for mobilization and deployment, and combat readiness (Harris et al., 1992).

1.3 Readiness

According to Army doctrine, the U.S. Army determines the readiness of company-sized and battalion-sized units by assessing four areas: personnel, equipment on hand, equipment serviceability, and training to meet the METL (mission-essential task list) (U.S. Department of Army, 2003). *Personnel readiness* is the extent to which approved positions in the unit (called authorized positions) are actually occupied by trained and qualified personnel. Personnel readiness is also indicated by the percentage of senior-ranking soldiers available for deployment under wartime requirements. *Equipment on hand* shows the extent to which the equipment described on the unit’s manifest (called the Table of Organization and Equipment or TO&E) is available to perform the unit’s wartime mission. *Equipment readiness* describes the extent to which the equipment in the unit (i.e. the equipment on hand) is likely to be functional and continues to be operational (called operationally sustained), and relies on the unit records of equipment serviceability. *Training readiness* indicates how the soldiers individually and the unit collectively are prepared to execute the assigned tasks and missions described in the unit’s METL.

Because the topics of recruitment and retention involve personnel, emphasis is here placed on personnel readiness. Having enough personnel, either newly acquired or those who continue military service beyond the initial obligation, relates directly to readiness. Lacking personnel has serious consequences. For example, in the ARNG, when the overall readiness rating is high, the unit is placed on the list of ready and available units for missions, receiving funds for training. If the unit cannot maintain its personnel strength from year to year, eventually the unit becomes a candidate for transfer to another status, or for elimination.

1.3.1. Readiness and recruitment

Recent difficulties in recruitment during wartime (as noted above) often resulted in taking less qualified recruits (Gallaway et al., 2013; Lipscomb, 2015). While many of these individuals performed adequately, there has been some debate about their relationship to readiness. The U.S. military has seen a marked increase in the number of suicides among personnel; in particular, the Army active duty and reserves, starting around the beginnings of the wars in Iraq and Afghanistan. The suicide rate rose from 10.3 suicides per 100,000 service members in 2001, to 15.8 suicides per 100,000 service members in 2008. At the same time, over several years, the percentage of new recruits who had medical and moral waivers had increased (e.g. see ARNG, 2015). This fact, in combination with others, led some to believe that soldiers were increasingly more vulnerable to health problems, including suicides. Griffith and Bryan (2016) proposed a vulnerability to psychological problems among Millennials, although its consequences are more likely to be evident in the military due to the characteristics of its changing recruit population. There are fewer volunteers, and of these, one half are taken. Studies that suggest increased moral and medical waivers have been presented previously (VanderBrook, 2017a, 2017b). Evidence also suggests that more recruits come from non-traditional family structures, which are often associated with reduced social integration and higher suicide risk. According to Griffith and Bryan (2016), these factors make increased vulnerability more evident among U.S. military service members than among the general population.

1.3.2. Integral to national defense: Reserves

With the Total Force policy (1980), the Army reserve became integral to any major combat operation conducted by the U.S. Before that time, the Army reserve had served as a “strategic” force. The reserves represented a deterrent against the Soviet Union and the People’s Republic of China. Reserves generally were never expected to be mobilized, short of major conflicts and a precursor to nuclear exchange. The preparation of reserves was conceived as a protracted period and in itself signified escalation to meet Soviet and Chinese threats. This situation characterized much of the time period from World War II to the First Gulf War in 1990. Reserve forces served to complement the active duty forces when needed, and there were several occasions when this was the case, for example, during the Korean War (1950-1953). When the war ended, the reserve services were generally not called to active duty, but were largely used as a strategic deterrent for Soviet and Chinese threats. This was the case in the Vietnam War; very few personnel were activated from the reserve. President Johnson did this purposefully, to avoid domestic resistance against the war. Reserve units were comprised of personnel who came from nearby communities where they lived. Mobilizing a unit meant that many individuals from the same geographical area would be affected. These events resulted in continually using the reserve force primarily as a “strategic defense.” That is to say, reserve forces existed not to necessarily participate in smaller police actions, but to be present for mobilization for general warfare against the Soviet Union or the People’s Republic

of China. A mobilization of the reserves would serve as an initial signal of global war and the possibility of nuclear war. Accordingly, reserves were rarely called up.

1.3.3. Total Force test: Observations of (non) readiness

Policymakers and military leaders alike knew that the Total Force concept developed sometime during the 1980s. But the concept was not tested practically until 1990, during the First Gulf War. Approximately 230,000 Guard and Army Reserve personnel were mobilized for active duty military service. More than 100,000 of these part-time soldiers were sent to the Persian Gulf, and the remainder served stateside to replace departing regular forces (Nelson et al., 2001). Numerous shortcomings in the reserves as a complementary force readily became apparent, and they could not be mobilized in a timely manner (Kirby & Buddin, 1996; Orvis et al., 1996). Firstly, many units were not properly staffed. To keep units intact, personnel who had stopped attending weekend drills (“unsatisfactory participants”) were still listed on the personnel rolls (often called “ghosts”). This practice gave the appearance of meeting end-strength requirements and avoided losing federal funding and unit allocations.

Secondly, those personnel present in units had yet to be trained (e.g. to attend basic training or advanced military occupational specialty training) or had not met physical fitness and medical requirements (e.g. they were overweight, unable to pass the Army Physical Fitness Test, had dental problems, etc.). These and other inadequacies were subsequently documented, including shortcomings in individual job skills and combat preparation, utilization during weekend drills (having received task assignments), non-commissioned officer (NCO) and officer leadership, and collective training (Allen, 1992; General Accounting Office, 1992; Griffith, 1995). Thirdly, there were serious problems in leadership at the lowest levels. A GAO report (GAO, 1992) recorded inadequacies in NCO leadership skills, tactical and technical competencies, and the ability to train their squads and platoons. The report concluded that shortcomings in unit leadership were among the most serious problems, rendering the unit ineffective. Griffith (1995) examined junior-ranking soldier responses before and after the Gulf War. Enlisted soldiers perceived inadequacies in both NCO and officer leaders. Officers were not trusted, did not have the soldiers’ confidence, and were not seen as caring about the soldiers. After the war, almost twice as many deployed soldiers than non-deployed soldiers reported these problems in unit leaders.

1.3.4 Remediating readiness shortcomings

Many of these noted shortcomings resulted in several initiatives after the Gulf War to improve individual and unit readiness, including the Reserve Component Training Development Action Plan, aimed at improving individual soldier skills and leader effectiveness; the Leader Development Action Plan (U.S. Department of Army, 1997) to better select, educate, and assess leaders; the “Bold Shift” initiative (Sorter et al., 1994) prescribing policies and procedures for combat maneuvers during peacetime;

and Title XI (Lakhani & Fugita, 1993) to better prepare individual and unit readiness for mobilization and deployment.

Many of the problems of reservists centered on uncertainties about mobilization and deployment, particularly considering that historically the reserves were rarely called to active duty. Reservists – part-time soldiers – became full-time soldiers when mobilized, affecting both civilian employment and family life. Reservists were unaccustomed to being separated from family for long time periods. This separation, when unanticipated and unprepared, caused burdens on reserve soldiers and their families. Castaneda et al. (2009) interviewed Guard and Reserve families of soldiers who had been deployed overseas. Those service members and spouses who had received little notice of deployments were more likely to name household responsibilities, financial and legal concerns, and continuation of civilian employment as problems during deployment.

To address the issues of lack of readiness, the Army Force Generation (ARFORGEN) established clear stages of preparation, deployment, and reintegration. The stages occurred over a 3 year period, so during major U.S. operations reserve soldiers could be expected to be deployed every 3 years. This gave mobilization and possible deployment more certainty for planning civilian employment and family life during absences, and led to the development of support for reservists, their families, and civilian employers. The ARFORGEN policy (Whitlock, 2006) provides realistic expectations and more predictable time periods for deployments. The policy specifies phases during a 5-year cycle, roughly divided into equal time periods, during which units “reset,” “train and achieve mission readiness,” and are “available for deployment”. Reservists, their families, and their employers then know when unit deployments are most likely to occur and can plan accordingly. The Yellow Ribbon Reintegration Program (U.S. Department of Defense, 2008) bolsters both Family Support Groups (FSG) and Employer Support of the Guard and Reserve (ESGR) programs, providing reservists and their families with the necessary support before, during, and after deployment. The program funds activities at 30-day, 60-day, and 90-day intervals after deployment, furnishing information sessions on the stresses associated with separation and deployment, and offering counseling and other support services. Most recently, the Army has developed widespread training to promote the recognition and treatment of personnel who show suicide risk (US Department of Army, 2010).

In the next section, a conceptual framework is presented to tie together the three areas discussed thus far – recruitment, retention, and readiness, leading to several directions concerning these topics.

2 A UNIFYING MECHANISM: IDENTITY THEORY

Connections have been made between recruitment, retention, and readiness in the context of the AVF, with emphasis on the Army reserve components – USAR and

ARNG. These processes are most salient in a volunteer military force, due to fewer eligible applicants (having fewer who are interested and fewer who qualify to apply) which, in turn, affects retention (having to access more recruits when retention is low) and readiness (having to take less than optimal recruits to meet recruitment goals). Lacking, however, is a conceptual framework to tie these processes together, especially the individual to military service. At the individual level, the question is, what underlying mechanisms help clarify the relationship of an individual's behaviors and cognitions to wanting membership in the military? The tentative answer may lie in social identity theory, and through its application, suggesting future directions for recruitment, retention, and readiness.

Social identity theory has been linked to important outcomes, particularly those relevant to the military, such as individual attraction to groups and cohesion among group members (Hogg, 1992), stress adaptation (Haslam et al., 2008), individual and group performance (Beal et al., 2003), and the contextual effects of health problems and recovery (Haslam & Reicher, 2007).

2.1 Social identity theory

Social identity proposes that a person's sense of who they are is based on group memberships. Individuals derive much pride and self-esteem from the groups they are members of, such as social class, profession, work, religion, family, etc. (Tajfel & Turner, 1986; Turner, 1989). The initial process of identification is *self-categorization*, recognizing that one is a member of one group ("us") but not another ("them"). Individuals categorize themselves relative to the group to the extent that they exemplify the attributes of the ideal group member (called a prototype). This process gives meaning to events in relation to oneself through the group.

Identity is closely bound to *self-schema* – an integrated organization of the individual's memories, beliefs, and generalizations about themselves, and when combined, yield a general sense of self (Markus, 1977). This self-schema aids the individual in understanding the world – what to perceive, how to interpret these perceptions, and how to use this knowledge. Self-schema determines what is relevant to the individual; for example, a self-schema of an outdoor person will attend more to field activities than to indoor sedentary activities. Haslam et al. (2005) described how athletes more often recognize and own up to injuries specific to their sport than other physical injuries. Self-schemas have also been associated with increased memory (i.e. storage and retrieval of information) relevant to the self-schema (Rogers et al., 1997). Through social interactions, people also come to know who they are relative to group roles. Groups often define consistent ways of behaving and thinking relative to roles, e.g. in the family – father, husband; at work – coworker, boss; and social life – neighbor, friend, and so forth. Lastly, members of one group compare themselves to members of other groups (called *social comparison*) either more or less favorably, which can lead to enhanced or lowered self-esteem. Through the social processes of categorization, identification, and comparison, the person adopts a sense of self and self-esteem bound to group membership.

2.2 Identities and military service

Social identity can be used as a mechanism to manage – at the individual level – relationships between recruitment, retention, and readiness in the military. Advertised images of military members are of no small importance. Knowing prospective recruits' conceptions and expectations about being in the military can help construct ads to attract recruits. The more these images correspond to an individual's identities, the more likely the individual will see themselves as being a service member. Once serving, the military can construct experiences that fit these expectations to strengthen the relationship between the cognitions of the prototypical soldier and those of the soldier themselves. This would be expected to increase the desire to remain in military service. Additionally, experiences can be constructed to develop prototypical soldiers consistent with military missions and, in turn, enhance soldier and unit readiness.

Many of these events already occur, though largely unnoticed. Griffith (2011) outlined several Army reserve identities spanning a time period from post-World War II to the present day. The *"obliged-conscripted citizen soldier"* (1940 to 1971) serves out of a sense of obligation to the state; serves out of imminent need to defend the state; comes equally from "all walks of life" – representative socioeconomically, racially, ethnically, and religiously; has identity fundamentally as a civilian; and serves in the military temporarily. The *"weekend warrior"* (1954 to 1990s) understands reserve military service as a part-time weekend activity requiring less involvement and commitment, often seen as an alternative to leisure activity. The *"instrumental volunteer"* (1972 to present) gets interested and joins the military largely for material benefits, such as money for college, bonus money, job skill training, and employment. The *"soldier warrior"* (1993 to present) joins to serve and defend the country and wants military training and experience that prepare him for war. The *"conservative ideologue"* (2000 to present) serves to promote nationalistic and conservative values in the military. Each correspond to a particular identity largely due to the national defense strategy (i.e. the reserve as a non-operational force); the geopolitical situation (i.e. threats of the Soviet Union, Iraq, etc.); domestic and economic contexts (e.g. Vietnam protests, depressed economy); how the Army portrayed itself in advertisements (e.g. "Be all you can be," "Army of one," etc.); the incentives which are promoted (e.g. bonus money, educational benefits, job skill training, service to country, etc.); and Army experiences (i.e. rewriting the Soldier's Creed from a humanitarian to a warrior).

2.2.1 Identity and readiness

In the AVF, several conditions affect who is recruited, which has implications for readiness. Broader geopolitical context and national defense strategies can impart identities to soldiers which relate to readiness. For example, the reservist who is part of a strategic deterrent and rarely expecting to be called up develops an identity of "weekend warrior" (see Griffith, 2010). A more common identity these days for reservists is the "soldier warrior," who is expected to be ready for call-up and deployment. As many as 30% of the U.S. ground forces were reservists in the OIF

and OEF. Recruitment campaigns often market to specific segments of American youth. For example, one of the first concerted marketing efforts for the Army Reserve was “money for college,” offering recruits ways to defer costs of college education expenses. Such a strategy often attracts what is called an “instrumental soldier”, who has joined chiefly for material benefits, such as money for college, job training, and extra money (Griffith, 2008). This identity corresponds to Moskos’ (1977) occupationally-oriented soldier versus an institutionally-oriented soldier. Viewing military service as institutional means having values that create and sustain a personal sense of obligation, loyalty, and sense of duty. Viewing military service as occupational means perceiving military service as one would perceive a civilian job. The former is more committed and willing to undergo adversities than the latter.

Some have speculated that these identities relate to recruitment, retention, and readiness. Griffith and Perry (1993) reported fewer college-bound enlisted in the Army reserve after Operation Desert Storm – one of the first large scale mobilizations of reservists. Griffith (2008) has observed that soldiers who joined for material benefits were less likely to intend to re-enlist, and not as combat ready as recruits who joined for patriotic reasons. Griffith (2008) reported that institutionally-motivated soldiers were more likely to plan to remain in military service, would report for duty so they did not let their buddies and family down, and believed in the mission and service to the country. In contrast, materially motivated soldiers were less likely to remain in reserve military service if deployed overseas, and were more likely to report for duty to meet contractual obligations and to avoid disciplinary action, but less likely to report to serve their country.

2.3 Applying identities to recruitment, retention, and readiness

Identity theory has relevance to the changing nature of military service, whether compulsory or volunteer, and the uses of the military and service members. Aspects of the theory can be useful for recruitment, retention, and readiness. Concerning recruitment, the more youth perceive model or ideal members of the military as having desired attributes, the stronger the intent to join. Gathering information on desired attributes is then important, and examining how well they correspond with attributes of ideal members of relevant reference groups, that is, military members. Periodic scientific polling can accomplish this, much like the past Youth Attitude Tracking Surveys and the current Joint Advertising Market Research & Studies (ACOMS). Having identified the desired attributes of youth and their correspondence with a prototypical military service member, these attributes can then be used to develop specific identities through multimedia messages. Attributes would be expected to vary by military service; for example, the Marines – “the few, the proud”; the Air Force – “aim high”; and the Army – “Army of one.” The message content could also be crafted so that attributes correspond to the desired types of military identities or personnel. For example, advertising educational benefits, job training, and bonus money portray military service more as a “job,” as found in the civilian sector. Moskos (1977) called this making military service appealing as an occupation. College-bound youth might be more attracted to military occupational specialties that involve civilian-like academic training, such as extended language

training. Such marketing approaches may be suited to a strategic force, having time to prepare for mobilization and deployment, much like the Cold War era, but are likely unsuited to meet the demands of the current operational reserve force.

Multimedia messages could then be evaluated in terms of these intended attributes. Are youth exposed to the messages? Do youth comprehend the intended content of the messages? Do the messages alter the perceived identity of the model military service member? Are altered perceptions related to increased propensity to join or actually joining the reserve military service? Equally important is examining the extent to which young people's perceptions of ideal members of the military diverge from what youth desire as an identity. The greater the disparity, the less likely youth will see the military as a group for possible membership.

Identities also have implications for retention and readiness. The greater the lack of agreement between the desired attributes of the individual and those of the ideal service member, the less likely the individual will be retained. For example, during Operation Iraqi Freedom and Operation Enduring Freedom, some reservists who initially joined for educational benefits (as an "instrumental volunteer") but who had to leave college for deployments (became a "soldier warrior") disproportionately left the reserve military service (Griffith & Perry, 1993). Alternatively, the greater the connection between the desired attributes of the individual and those of the ideal service member, the greater the likelihood the reservist will be retained. To illustrate, Griffith examined variable sets matching prevailing hypotheses about USAR retention, based on socio-demographic background, incentives, job satisfaction, low role conflict, and combat readiness (Griffith, 2005). The variable set representing the reservists' perceptions of being adequately prepared for deployments (i.e. combat readiness) was most strongly correlated with the intention to remain in reserve military service. This finding likely indicates a shift in reserve identity from the "instrumental volunteer" and "weekend warrior" to the "soldier warrior," and the more the reserve military service matched the attributes of the "soldier warrior" (i.e. being prepared for deployments), the more likely the reservists would remain in service. Identities incongruous with the demands of reserve military service have implications for readiness. For example, reservists' concerns about being inadequately prepared for deployments (lacking "soldier warrior" identity) have been associated with post-deployment post-traumatic stress symptoms (Erbes et al., 2008). Thus, benefits would be achieved by developing identities corresponding to the new and emerging demands and requirements made of reservists, and the more identities complement and support missions, the greater the commitment and enthusiasm of soldiers to carry out the mission.

Summary In this paper, I have described the challenges presented to the U.S. military, having gone from a draft to all-volunteer force. Challenges to recruitment, retention, and readiness are described, largely in the context of the reserve military service – a service in the U.S. military which has, more recently, been relied upon to conduct major military operations.

In the AVF, *recruitment challenges* have involved getting enough interested youth who qualify to join the military. Vietnam experiences discouraged many youth, particularly disproportionately among African-Americans, from being interested in military service. *Retention challenges* pertained to providing service members' with expected military experiences – largely training relevant to missions, meaningful and engaging duties, and quality leadership. Unmet experiences were, in part, due to lack of funds and the traditional strategic, static role of the reserves. *Readiness challenges* included recruiting service members capable of dealing with new and emerging issues and providing service members with training relevant to current and anticipated missions.

The challenges were illustrated by specific examples experienced by the U.S. AVF. Identity theory helps respond to questions relevant to these processes. Who is needed (to be recruited and retained)? What should members of the military experience, and for what purposes (to be ready for what)? Identity theory helps clarify the underlying mechanisms of individual cognition, intentions, and behaviors relative to military service, specifically those pertaining to being recruited, retained, and combat-ready. Accordingly, identities can be used as a mechanism to manage these important military staffing concerns.

Footnote 1. The U.S. military assesses the cognitive ability of applicants by administering the Armed Services Vocational Aptitude Battery. Standard scores from subtests (namely, arithmetic reasoning, mathematics knowledge, paragraph comprehension, and word knowledge) are used to derive Armed Forces Qualification Test scores. These scores correspond to eight categories of cognitive ability: from highest to lowest, I, II, IIIA, IIIB, IVA, IVB, IVC, and V. Normally, applicants scoring in Categories I through III qualify for military service. Category IV applicants must be high school graduates and cannot be denied military service in order to meet end strength. Applicants in the remaining categories normally cannot serve in the military, and, if allowed, cannot exceed 20% of all applicants accepted in a fiscal year.

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LAHKO DOBIMO TO VOJNO? IZZIVI PRIDOBIVANJA IN ZADRŽEVANJA KADRA V SLOVENSKI VOJSKI 15 LET POZNEJE

CAN WE WIN THIS WAR? SLOVENIAN ARMED FORCES RECRUITMENT AND RETENTION CHALLENGES 15 YEARS LATER

Povzetek V članku so predstavljeni izzivi in uspešnost pridobivanja in zadrževanja vojaških oseb v Slovenski vojski ter vloga ugodnosti in nadomestil v nekaterih članicah Nata. Prehod na poklicno sestavo Slovenske vojske in njen zakonodajni okvir ne podpirata zaključka njene profesionalizacije. Petnajst let po opustitvi naborniškega sistema se je Slovenska vojska znašla pred veliko dilemo glede svoje funkcionalnosti. Do tega je prišlo zaradi neuspešnosti pri pridobivanju in zadrževanju kadra. Zaradi nizke stopnje popolnjenosti enot v SV in posledično tudi njihove nizke stalnosti in stabilnosti vojaške enote vse težje dosegajo visoke standarde usposobljenosti in s tem tudi sposobnost izvajanja osnovnega poslanstva – sposobnosti za bojevanje. Slovenska vojska je kot organizacija izpostavljena velikemu demografskemu in ekonomskemu pritisku trga delovne sile in danes ni prepoznana kot zanimiv zaposlovalec za mlade. Ne le za svoj nadaljni razvoj, temveč celo za obstoj nujno potrebuje nov družbenopolitični konsenz v družbi.

Ključne besede *Slovenska vojska, oborožene sile, zagotavljanje virov, pridobivanje in zadrževanje kadra v vojski, beneficije in nadomestila.*

Abstract This article presents the challenges and the success of recruitment and retention of military personnel in the SAF. It also addresses the role of benefits and compensations in some NATO member states. The transition to a professional army in the SAF and its legal framework do not support the conclusion of its professionalization. Fifteen years after abolishing the conscription system, the SAF has come to a big dilemma regarding its functionality. This has occurred because the recruitment and retention of its members have not been successful. Due to a high level of vacancies in SAF units and consequently their low continuity and stability, military units have great difficulty achieving high capacity standards and consequently the competence of carrying out their main mission – combat ability. The SAF as an organization is

exposed to important demographic and economic pressure of the labour market and is nowadays not perceived as an alluring employer for young people. It is, therefore, in urgent need of a new socio-political consensus within the society, not only to ensure its future development, but also its sheer existence.

Key words *Slovenian Armed Forces, armed forces, provision of resources, military recruitment and retention, benefits and compensations*

Introduction Military personnel policy (recruitment and retention) in Slovenia is a purely national choice. It is actually based on four main factors: economic, political, social and demographic trends. It is clear that there is a strong correlation between them, so the absence of any of them can undermine the success of military recruitment and retention. On the other hand, a high level of synergy between them could present an excellent opportunity to achieve a *raison d'être* for the Slovenian Armed Forces (SAF) – making it ready to fight. Combat readiness represents the core and sense of the existence of SAF in the state. Any kind of deviation from that could easily represent a huge failure of national security.

The worse scenario concerning the SAF is one where the military organization loses more than 6% of their troops each year, while on the other hand achieving a low level of Recruitment Successful Rate (RSR¹) with those individuals who fail to qualify for a job in other sectors of society.

The armed forces as an organization in states does not have a direct obligation to compete with non-military organizations in terms of salaries, deferred compensations and benefits in-kind, because this is under the direct responsibility of the government, which sets up conditions for them in society.

Successful human resource management (HRM) and an adequate financial budget are fundamental for the SAF to ensure that it can implement and accomplish the delegated goals of national security. Both governmental control through the Ministry of Defence of the Republic of Slovenia (MOD), and the legislative framework which monitors the defence budget play an important role in this regard, particularly when it comes to the composition of the armed forces. There is serious competition in all countries for the allocation of human and material resources.

1 IS ORGANIZATIONAL INNOVATION EVEN AN OPTION FOR THE SAF?

After the Cold War many countries moved their armed forces away from the more than 200-year-old idea of conscription. Understanding this, it is important to realize the possible consequences of separating the armed forces from society. Schemella

¹ "The Recruitment Successful Rate is the result of dividing the number of new recruits in by the size of the recruitment niche." (Sandell, 2006, p.76).

explained that such a step is also called the “Great Divorce” of society, and can lead to a lack of both expertise and interest in defence issues within the civilian sector, which can pass into the political structure so that elected leaders eventually lose touch with the reality of military concerns. Before a government clearly defines the structure of its armed forces, it must clearly articulate whether to have armed forces at all. If the answer is positive, the very next step should be to determine what such armed forces should do in society, and what their primary role should be as the guardian of the state. Peacekeeping has become important, not only for security reasons around the world, but also for internal domestic political reasons (Shemella, 2006).

One of the main missions of the SAF, as stated in the Defence Act (Article 37: “execute obligations assumed by the state in international organizations and through treaties”), had a serious impact on its development after it joined NATO to become a “peacekeeper”. It also enabled the Slovenian government to gain international recognition and prestige and, besides that, to commence the professionalization of the armed forces. The main threat to consistently carrying out peacekeeping operations in the long run is that it can have a negative influence on military readiness² or it can cause its degradation. Governments which support the defence establishment also decide on the size³ and strength of the military force, which has direct implications on the predictions of the costs of the forces, in both current and future terms. It is a real challenge to distribute limited resources across a wide variety of public purposes. If there is no clear and evident understanding of what armed forces are obligated to do, any distribution of resources (manpower, finance, equipment, etc.) is going to be unbalanced or even catastrophic. A weak resource policy (in terms of both financial and human resources management⁴) over a long period of time can have serious negative long-term consequences, not only on the SAF but also on national security.

Civilian intervention produces military innovation⁵ in peacetime, either directly or indirectly through the officer core, which provides the civilians with the expertise they lack (Posen, 1984). Machiavelli noted over four hundred years ago that “there is nothing more difficult to carry out, nor more doubtful of success, nor more dangerous to handle, than to initiate a new order of things.” (Rosen, 1991, p.1).

² *“Military equipping and training will inevitably conflict with the need for elected officials to serve the wider policies of the state. Senior military officials often conclude that they have been given insufficient resources (limited defence spending) to meet the national security requirements established by the state.” (Young, 2006, p.23).*

³ *“In tactics, as in strategy, superiority of numbers is the most common element in victory.” (Clausewitz, 1976, p.194).*

⁴ *According to Alexandrou and Darby, “Human resource management (HRM) within the armed forces is dominated by the need to recruit and retain the best available talent, contraction of the core workforce (i.e. armed personnel) and contracting demands on the public purse. The aim has been to deliver and improve efficiency, effectiveness, and flexibility. In practice, it seems to be characterized by a significant decrease in the number of service personnel, overstretching, low morale and difficulties in recruiting the next generation.” (2006, pp.157-158).*

⁵ *March and Simon (1985) suggest that organizational innovation begins with individuals in a problem-solving activity, which, under certain conditions, can then generate new organizational procedures.*

Avant states that a civilian decision on how to organize a military institution affects the integrity and institutional bias of that organization. Its integrity is the degree to which it presents a unified front. Different types of standards induce a commonality among members of the organization (Avant, 1993).

One of the biggest concerns about the distribution of power within the state is when it becomes institutionalized and shapes the decision-making views of military policy. In many cases, the government persists past its initial formulation, so that when civilians make decisions about military policy, their choices reflect their country's past experience with the armed forces and the role military played in securing a particular distribution of power within the state (Kier, 1995, p.68).

In the case of the SAF and its role in the society since independence in 1991, we can see that after 15 years as an all-volunteer force (AVF), it seems that the SAF today faces some serious and diverse challenges. As one of NATO's armies in Europe, it can be seen that it has a quite vaguely defined vision of how it is going to solve the main challenges that it currently faces:

- a) The old concept of defence legislation which limits further development of the SAF has a negative impact on the unfinished process of professionalization.⁶
- b) The fact that military personnel are public workers has in many ways an unpleasant impact on building strong cohesive military units (military units up to company level can reach a high level of cohesiveness if they have stressful and realistic military training, manpower stability and success).
- c) Extremely negative demographic trends in the recruitment niche which dramatically reduce the recruitment pool (36% decrease from 2004 to 2024).
- d) Unsolved economics of military manpower procurement, which is currently seen as the complete lack of competitiveness of the SAF on the labour market through serious problems with recruitment and retention. Since 2012 more personnel have left the SAF than have enlisted, and the future prognosis is also negative.
- e) Balanced long-term defence planning between material and human resources.

Bland states that the essence of defence policy is to define defence objectives, identify resource requirements, establish the rules of governing the uses of force, and provide civil authority⁷ over the armed forces. The object of defence administration is to establish, equip and sustain the armed forces, so as to produce as much usable coercive force as possible from the resources provided by the government. The purpose of the armed forces is to train up to standard and use coercive force at the

⁶ Kotnik (2015, p.23) believes that "specific areas of professionalization require further or continued attention; there was an explicit mention of salaries, infrastructure, family, welfare, leadership, relationships, adjustments in legislation and SAF promotion which, based on daily experience, could be at least expanded with a career path, care for the welfare of members, adjustments in legislation, cooperation with ministries, a complete system of criteria and programmes for selection and education and training in military leadership, and relationships with the civilian environment".

⁷ Civil authority over armed forces could be explained through seven traditional mechanisms of civilian control (Young, 2006, pp. 24-29): limits of the mission, limits of the size, limits on the budget, constitutional and legal limitations, the culture of professionalism, societal norms and a free press.

behest of the government. Soldiers are the people in societies who must be protected and valued. Moreover, they are the essence of the purpose of each armed force and they constitute the most expensive component of every military capability. Because of this, their overall readiness must be the central object of each defence administration. There is an unspoken social contract between the defence administration and military forces in the way that soldiers will not be put at risk unnecessarily or exposed to situations beyond their capabilities (Bland, 2005, pp.1-9).

According to Young (2017, p.9) “Slovenia is adopting Western defence and military concepts and its healthy civil-military relations, but is still suffering from making ambitious development plans, which even if endorsed by government and parliament, have been subsequently underfunded and declared as unimplementable”.

The SAF was more than aware in advance of the challenges of its own functional effectiveness and survivability in the post-modern era, where it is more than obvious that recruitment⁸ and retention⁹ policies rapidly supersede the conventional preoccupation of defence institutions with the acquisition process of military equipment.

2 THE SLOVENIAN ARMED FORCES AND DEMOGRAPHIC PRESSURES

The SAF has a relatively short tradition with a volunteer force. From 2003 on, each year more and more generations of young people have been exposed to the SAF’s recruitment effort. For those who did not join in their first year (after high school), the possibility of attracting¹⁰ them later on is likely to be even lower. This is the major reason why the Recruitment Successful Rate (RSR) in the SAF has fallen from 3.53 (2004-2006) to only 0.91 in 2017. If we examine the enlistment in five-year intervals, we can easily see the decrease (see Figure 1) in the enlisted on average per year (505 from 2004-2008; 332 from 2009-2013; 187 from 2014-2017). From 2020 on, the SAF will be exposed to much higher numbers of regular retirements from its personnel (overall 613 from 2010-2017 versus 1773 from 2018-2025). Both trends will have a tremendous effect on the SAF’s strength. The only way to control both processes is by achieving a much higher RSR and retention.

The prediction for future enlistment (from 2018-2027) relies on the same level of RSR as that of 2017. We can argue that the SAF will not be capable of increasing its RSR by any serious amount if conditions for employment do not become much more

⁸ “Recruitment is the process which occurs prior to enlistment. It deals specifically with marketing, advertising and the establishment of a trusting relationship between the recruit organization and the candidate” (RTO-TR-HFM-107; p. D-2).

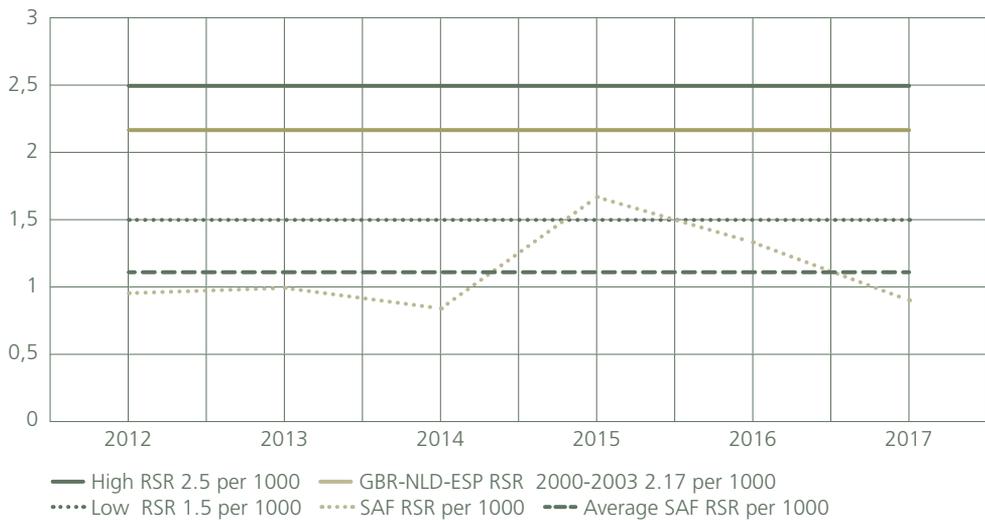
⁹ “Retention is the process of keeping adequate numbers of suitable personnel in the military in order to meet the needs of the organization. The primary concern will be to identify the factors contributing to the retention goals of the organization” (RTO-TR-HFM-107; p. D-2).

¹⁰ Schreurs and Syed (2004) recognize the non-behavioural indirect outcomes of attraction as organization prestige, the perception of the organization, and the recommendation of the organization to others.

Figure 1:
Number of newly enlisted and retired SAF personnel on average per five years; projected enlisted personnel from 2018-22 and 2024-27 (MFERAC, 2017)



Figure 2:
Size of the SAF's RSR (2012-2017) in comparison with low and high RSR – compared with the average RSR for Great Britain, the Netherlands and Spain (2000-2003) (Sandell, 2006, pp.76-77)



attractive in general terms *vis-à-vis* the current situation on the labour market (higher basic salaries, different benefits in kind, and deferred compensations).

The SAF's success in recruitment efforts is very low in comparison with some other NATO countries. Great Britain, Spain, and the Netherlands have been able to recruit about 2 per thousand of their recruitment niche¹¹ (RSR = 2.17, from 2000-2003). The

¹¹ "Recruitment niche is defined as a population niche which can fulfill the personal defence capacity in the armed forces" (Sandell, 2006, p.73). It is a different interval in different countries; currently in Slovenia it is from 18-27 years.

SAF's attraction measured through RSR is much worse (See Figure 2). The average RSR for 2012-17 is only 1.11.

If the SAF had been able to reach a similar RSR in the last 7 years as the other three countries, it would today have 1032 more soldiers (See Table 1) . With this number, the SAF could easily follow and achieve their yearly cohort¹². The answer as to why the RSR in the SAF is so low is complex, and affected by several different causes.

Table 1:
Recruitment
Success Rate
of the SAF,
2012-2017
(Statistical
Office of RS;
MFERAC,
2017)

	Number of new recruits in SAF	RSR	Population aged 18-25	Average RSR 2.17 ¹³ "for SAF"
2012	170	0.96	177337	385
2013	171	1.00	170765	371
2014	140	0.85	164344	357
2015	264	1.66	159062	345
2016	205	1.33	154550	335
2017	137	0.91	150560	326
	Total: 1087			Total: 2119

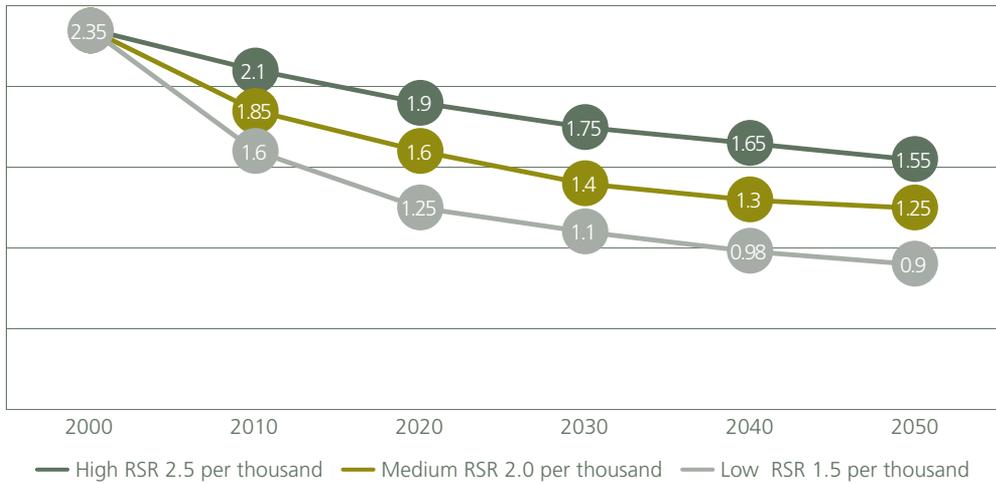
Three different recruitment scenarios (see Figure 3) could seriously affect the size of NATO's European militaries. Demographic shifts between 2000 and 2050 (and a RSR scenario of 1.5 to 2.5%) could reduce the overall size of NATO's European armed forces by 45% or even 65%. Furthermore, Sandell explains that to increase the number of troops across that timeframe would actually mean that the armed forces would have to either improve their RSR above the level of each scenario, or lower the exit rate. Different institutions on the labour market are even more attractive alternatives for many young people in the military's recruitment niche, so competition for them may become even fiercer and armed forces may lose this competition (2006, p.84-85).

Quester explains that in many advanced countries, the total number of younger people will seriously decline as an absolute number. The military personnel of most European countries retire at a considerably younger age than workers in the civilian sector. Some military tasks demand the stamina of youth, because it is hard to be effective in direct combat at the age of 45 (Quester, 2005, pp.27-28).

¹² A 'cohort' can be understood as a group sharing a common factor in a statistical survey, for instance, age (Webster's New World College Dictionary, 2010).

¹³ Average RSR for Great Britain, Spain and the Netherlands from 2000-2003; Sandell (2006, pp.76-77).

Figure 3: Aggregated numbers (in millions) of the European Armed Forces (NATO) from 2000-2050 and RSR (Sandell, 2006, p.84)



The main resource in an organization of the four outlined in the literature (human, material, information and financial) is simply people. Because of this, the selection, recruitment and retention of human resources begins to be recognized as one of the keys to organizational success. The main conclusions of this could be that:

- human resources (HR) are unique in terms of potential growth and development;
- HRM is one of the most challenging processes in the armed forces;
- HR constitute human potential, which must be understood, motivated and trained;
- the effective use of other resources depends on the efficiency of using HR (Badea et al., 2015, pp.198-202).

The fact is that the current demographic situation and future demographic trends will seriously stress current recruiting and retention practices. The biggest threat for the SAF is that clear demographic projections will not be taken seriously. Currently, the SAF is already falling under the inexorable influence of demographic pressure that can be seen in our very low RSR. This is going to force the HRM policy of the SAF towards some necessary and radical recruitment and retention practices; otherwise, the SAF will simply vanish without a trace in the years ahead. How the SAF will adapt to the clear demographic trends in the future also depends on the future requirements of its size (see Figure 4).

If the decline is not acceptable, there will be tremendous challenges to achieve a much higher RSR (achieving a higher level of RSR is in direct correlation with a higher defence budget). Šlebir (2017, pp.73-90) uses bivariate analysis to show strong correlations between the level of personnel expenditure and the overall personnel strength of the SAF (at least 1.6% of GDP for 7600 SAF personnel).

Figure 4:
Recruitment niche of the
SAF, 2004-2034
(Statistical
Office of RS)



For the last few years, the SAF has received a negative evaluation rate on its combat readiness (this evaluation is carried out in accordance with NATO evaluation procedures), and one of the major reasons was a lack of military personnel. We can agree that the economic and political support of armed forces within our society, as well as, in same manner, its social support, fall under direct political responsibility, and we can recognize them as dependent variables (social and political support can change over time, and also financial support depends on the yearly budget). Meanwhile, demographic trends could be recognized as a prognostic factor. If the SAF wants to achieve a higher level of RSR based on the current demographic niche (i.e. to be alluring as an organization on the labour market), the other three factors, social support, political support and financial support, must be in synergy and in a direct supporting role to achieve a high RSR. Understanding these direct correlations between all four factors, allows military and civilian leaders to make informed decisions and also to help facilitate effective policy-making decisions. A strategic approach on how to manage the recruitment and retention policy relies on clear strategic concerns and priorities about available resources.

We can agree with Sandell who recommends that some cooperative measures can be useful; he claims that armed forces are not alone in modern society in providing security services, and that competition over human resources within intra-state security organizations is not productive (Sandell, 2006, p.94). One solution could be a sharing of human resources within an intra-security organization in the state, so people could easily transfer from one area to another e.g. from the armed forces to the police.

3 THE SLOVENIAN ARMED FORCES AND ECONOMIC PRESSURES

Tresch and Leuprecht point out that the “current demographic and labour market trends mean that armed forces will hitherto have to rely increasingly on strong incentives, in terms of tasks, working conditions, professional development, remuneration¹⁴, and other benefits, both to retain their current workforce and to position themselves strategically in an increasingly competitive labour market” (Tresch and Leuprecht 2010, p.4). We can expect that this will be the biggest challenge in the near future for SAF also.

However, according to Micewski, one of the crucial questions will be the way the military integrates with society, and for an AVF the profound challenge will be how to meet recruitment goals and attract individuals to join the armed forces. Recruitment and retention must always be well organized, but differently between the states with an AVF because of the specific individual nation’s circumstances. This apparently requires an adequate financial¹⁵ basis and a properly functioning legal and bureaucratic structure. Soldiers must really believe that they are spending their time in the military meaningfully. Any deviation from this will have huge implications for the RSR, as well as for soldiers leaving the forces too early. If soldiers have the awareness that their service time in the military improves and enriches their personal and family lives, as well as offering skills that can be used in the civilian sphere (Micewski, 2006), we can understand that the recruitment and retention policy can count on success, which is recognized by achieving a higher level of RSR.

Figure 5:
Correlation
between RSR
and Defence
Expenditure
as a share
of GDP (%)
(Yearly Report;
MOD, Republic
of Slovenia for
2016)



¹⁴ Manigart (2005, p.570) showed that the main motivations of Belgian enlisted personnel to join the armed forces were regular pay (81%), job security (80%) and varied work (74%).

¹⁵ Knodell (2017, p.5) explains that the British military was struggling to find new recruits in 2016 (shortfall of 28%). A strong growing economy meant that future recruitment was not granted. The British ministerial answer to that was: “in response we have in place a number of short and long-term plans to ensure that the offer of military service in the armed forces continues to be competitive so that we can recruit and retain in sufficient quantity to meet strength targets”.

Figure 5 explains in general the correlations between the SAF's level of RSR in 2009-2017 and defence expenditure as a share of GDP (%). With the decrease in GDP for defence, the RSR also dropped to its current 0.91. We can argue that there are no evident correlations between defence expenditure and RSR in 2015 and 2016 (the RSR actually increased), despite the decline in defence expenditure. We can assume that the cash compensation for the additional workload during the migrant crisis in 2015 had in some way a positive effect on enlistment overall. On the other hand, higher defence expenditure could have a direct influence in achieving a higher RSR only when some of the additional finance would be allocated to a cash bonus, benefits, and deferred compensations. It is not a surprise to realize that there are direct links between the level of GDP (%) for defence and the proportion of spending on personnel, equipment, infrastructure and operational costs. The lower the relative defence GDP of a country, the higher the proportion of the overall percentage which must be spent on personnel (Slovenia, Belgium, Bulgaria, Portugal, Albania and Italy), and vice versa; the higher the relative defence GDP in a country, the lower the overall percentage set aside for personnel (USA, the UK, Estonia, Norway, Poland and France).

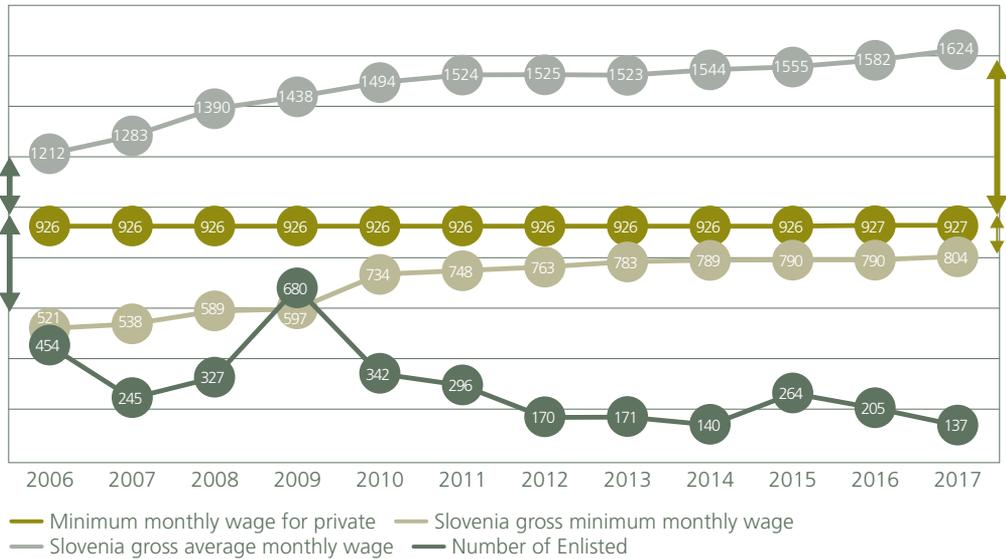
Monitoring and evaluation of military salaries, deferred compensation, and benefits in kind for the efficiency of military personnel are among the crucial tools for the competitiveness of the armed forces on the open labour market. Hartley states that British armed forces' pay¹⁶ and conditions are evaluated annually by the Armed Forces Pay Review Body¹⁷, an independent body that provides advice to the UK Government on remuneration and allowances for military personnel. Its recommendations are based on the need to reach attractive pay for military personnel in order to be more comparable with civilian salaries on the open labour market, together with the need to recruit, retain and motivate suitably able and highly qualified individuals for a life in the service (Hartley, 2006, p.309).

Figure 6 explains what has happened to SAF soldiers' salaries in the last decade. Their salaries have remained the same for the whole time, while there has been a dramatic increase in the Slovenian gross minimum monthly wage and the gross average monthly wage. Over ten years, salaries in the SAF have decreased by 31% in the nominal term (a 23.6% inflation rate and an 8% decrease in salaries in 2012). In the case of the SAF, we can see a strong trend and a clear positive correlation between the decrease in soldiers' salaries against the gross average monthly wage and the number of newly enlisted members in the SAF. The only divergence occurs in 2009, where an evident increase in the newly enlisted can be seen. We can argue that this peak had consequences in the 2008 payment of benefits (19% increase in salary) in accordance with Article 59 of the SAF Service Law, which once more clearly shows that increasing salary has a direct positive influence on recruitment and retention.

¹⁶ Daffix (2006, p.314) states that the French experience shows that the overall economic situation in France was a key factor in the success and in the final costs of the transition to a volunteer force.

¹⁷ As in the UK, a similar body in Canada, called SCONVA (Standing Committee on National Defence and Veteran's Affairs, composed of 11 members of Parliament) has existed since 1997. Its task is to annually review the social and economic challenges faced by Canadian military personnel and their families. Their task is to recommend solutions to recognized problems (HC 43, 2007).

Figure 5: Correlation between the number of the enlisted, minimum income salary for privates in the SAF, the Slovenian gross minimum monthly wage, and the Slovenian gross average monthly wage; 2006-July 2017 (Statistical Office of RS; MFERAC, 2017)



In accordance with Kreiger and Kenny, some armed forces with longer experience in military benefits and the compensation system found that they needed to reform the entire paradigm of personnel management. The recommendation is to seek a higher level of flexibility of benefits for military personnel, and an *à la carte* benefit system customized to a service member's individual and family needs, instead of mandating a one-size-fits-all approach (Krieger and Kenny, 2015).

Many different studies of military personnel recruitment and retention have found that both are quite sensitive to military pay. According to Werner and Negrusa, the belief that recruitment and retention is insensitive to military pay can be recognized as incorrect; the higher the military pay, the more the interest from the labour market and the more young people will be interested in serving (2006, p.144). We can therefore conclude that the SAF's success in recruitment and retention will be under the serious influence of not only military salaries, but also the compensation package and benefits in kind; it is important how the government sets¹⁸ military salaries.

Almost a decade ago, Tresch and Kopač (2010) conducted some research into recruitment and retention in the SAF. Even at that time Tresch recognized that recruitment in Slovenia was unsuccessful, and that the SAF was already in a difficult position in 2007. First and foremost, there was a lack of infantry. Many of the interviewees understood the acute shortage of soldiers even a decade ago, and they emphasized a fear that in the foreseeable future (from 2012 onwards), the SAF would no longer be able to fulfil

¹⁸ According to Warner and Negrusa (2006, pp.154-155) "the average monthly income of male workers in the Romanian economy in 2004 was about \$183 per month. Privates who were volunteers were paid between \$191 and \$ 317 per month, depending on their experience".

its obligations towards the EU and NATO. Even at that time, financial incentives were a main motivating factor for Slovenian soldiers. In 2003 a soldier's salary was on average 30% higher than that of a similar civilian job on the labour market. We can agree with Tresch that there were no problems at the beginning of the transformation to an all-volunteer force in 2003 and 2004, and that the first recruitment problems appeared from 2005-06, especially among soldiers (infantry and specialists). At that time Tresch clearly identified the already fierce competition for qualified personnel between the SAF and the civilian police. He identified some helpful measures which could have been taken, if the necessary financial means had been available:

- The armed forces should pay current market salaries;
- The armed forces need to offer a variety of further educational programmes that are also recognized by the labour market;
- The recruitment process for military professions should be clearly structured and efficiently run;
- The armed forces must be recognized as an attractive employer;
- For professional officers and non-commissioned officers, the possibility of a military career is pivotal (Tresch, 2010, pp.145-165).

Kopač's research on retaining¹⁹ military manpower in the SAF shows that interest in re-enlistment among military members is extremely high in Slovenia. We can support his thesis from a decade ago that "a more favourable economic environment can change conditions rapidly, because most of the military manpower would be ready to abandon the SAF if they were offered a suitable position in the labour market. Furthermore, since the SAF only offers fixed-term employment, and for most people in our society permanent employment is still the ideal, retaining²⁰ military manpower will not be an easy task. Among soldiers in 2008, satisfaction with payment was mostly based on the monetary compensation which mostly arose from additional workload and not on the payment for regular work (the longer an individual has been employed in the SAF, the more dissatisfied they are with the payment)" (Kopač, 2010, p. 246).

Scenarios and threats from a decade ago concerning the announcement of problems with recruitment and retention for the SAF have become real. Even though the political leaders knew about the upcoming scenarios, nothing happened. It should be added here that during 2010-2016 members of the SAF stopped receiving cash compensation for additional workload due to the financial crisis (they gained extra working hours, for which they were compensated by extra leave).

In the last five years (2012-17), the SAF has been under serious pressure on how to raise its effectiveness and efficiency because of its severe financial restrictions. In

¹⁹ Moore (2002, p.274) believes "that the two most important variables for retainment in the armed forces are satisfaction with pay and benefits and taking pride in service. The former represents the material factor and the latter the ideal. Taking pride in service is a much stronger variable in predicting whether or not one intends to remain in the military".

²⁰ The Danish Armed Forces, in order to remedy the shortage of military personnel, introduced a policy to incite personnel with attractive arrangements, such as better pay and other individually designed conditions. Their retention policy consists of pushing out some service members while desperately trying to retain others (Sorensen, 2017, pp.9-10).

2013, during the reorganization, one of the SAF's efforts was to provide the service for military personnel as close as possible to their permanent residence (regimental system). Reimbursement for transportation (daily travel to barracks) and deployments have for many years represented a major monetary compensation for military personnel (due to the low basic pay). In 2014 both were decreased in number; fewer deployments and lower reimbursement for transport (almost 40% in total).

The fact is that the SAF today is a smaller and much older organization (on average within a 10-year period: 35 years – 2006, 40 years – 2016; Yearly Report of the MOD of RS for 2016) and this trend will not stop in the next few years, unless there is a serious increase in the defence budget. Slovenian taxpayers will dedicate large financial resources for the modernization of the armed forces in the next mid-term period.

The main concern today is – who will be managing them?

4 ORGANIZATIONAL ADAPTATION OF OTHER NATO COUNTRIES ON DEMOGRAPHIC AND ECONOMIC CHALLENGES

Rostker and Gilroy state that there is a very fragile relationship between recruitment and retention and economic factors, especially in the aspect of the labour market in which the military compete for manpower. Furthermore, they argue that based on many years of experience with an AVF, there are some reasons for its success,²¹ such as:

- Military pay must be set at a comparable level to the civilian sector;
- Specific monetary incentives are needed to motivate individuals to enlist and re-enlist (bonuses and special pay):
- The military must learn how to recruit and quality goals for recruitment must be established;
- Attention and leadership from the top management are vital;
- An advertising strategy must be established;
- Quantitative analysis should be used to test, adjust and evaluate the AVF policies;
- The development of programmes for attracting the necessary type and number of recruits;
- The explanation of the benefits and opportunities of military service and military career opportunities:
- Adequate financial resources. (2006, pp. 233-262)

Clay-Mendez recognizes that a successful AVF requires a compensation package of cash²² and also benefits in kind, sufficient not only to attract high quality youth but also to

²¹ *During the transformation of the Danish Armed Forces, Schaub (2012, p.27) points out that there are two important conclusions which will have positive effects on Danish forces:*

- *Systematic data reporting is imperative for success (annual reports of all personnel data)*
- *Focused development, recruitment, promotion and retention policies are key.*

²² *Most measures to improve recruitment and retention have been based on financial incentives. These incentives have been generally successful in the British Armed Forces (HC 43, 2007).*

retain well-trained and experienced military personnel. Because many older employees already have a family, the compensation package must provide a way of life acceptable to families. Each NATO member has its own historical, political, economic and social environment. Thus, simply copying other countries will not be relevant. All governments should be very precise and cautious when introducing policies, in order to implement a new system for paying an AVF. The balance between salaries, deferred compensation and benefits in kind must be carefully monitored, and it should be recognized that while there are various exceptions, a cash payment is generally most cost-effective. Choices about how compensation is provided can make a big difference to their cost-effectiveness. Because benefits²³ provided in kind restrict individual choice, they are generally less efficient than cash payments (Clay-Mendez, 2006, pp.285-286).

The approach to how to achieve a successful recruitment and retention policy (see Table 2) and a high level of RSR is solved by different NATO countries in their own specific ways. They all recognize the importance of an attractive basic salary and a variety of bonuses and compensations which support not only the enlistment but also the retention of military personnel.

Table 2:
Monetary and non-monetary incentives in some NATO member countries for the recruitment and retention of military personnel (HFM-107, 2007; <http://militarypay.defence.gov/pay/bp/>; <http://waset.org/publications/10004210>; Dolečkova, 2016; Daffix et al. 2006)

	RECRUITMENT	RETENTION
BELGIUM	<p>Attractive basic pay. Reduced time between first contact and employment. Lowering the cut-off score. Selection and training for selectors. New legislation on recruitment and selection. Targeting minority groups.</p>	<p>Different bonuses for different military categories. Special retention bonus. Career pay rise. Possibility to return after leaving the military. Providing day care for small children. Extension of short-term contracts. Bonus for deployments.</p>
CANADA	<p>Recruitment allowances. Subsidized educational programmes. Attractive basic pay. Conveying information in relevant forums. Strategies for communication. Improved attractiveness for critically short occupations. Improved basic training that reduces training losses.</p>	<p>The injured, retired and veterans – care of injured personnel. Bonus for military families. Transition includes recognition and work expectation. Bonus for housing – accommodation.</p>
	Pay and allowances – compensations for the military job.	

²³ *The benefits package approved in 2014 by Germany's Cabinet aims to create greater workplace flexibility and to increase financial incentives for soldiers, as part of a broader effort to fill a recruitment gap created by the decision to end the conscription system in 2011. They introduced a 20% increase, distributed over the course of four years, or a one-off payment of 21,000 EUR. The package also gave soldiers a 7% rise, and some more difficult jobs got a 40% rise. The Defence Minister, Ursula von der Leyen, sought to make the military more competitive with private sector employees by offering more flexibility and a greater variety of benefits for soldiers. (<http://www.dw.com/en/german-cabinet-approves-benefits-package-for-bundeswehr-soldiers/a-18027512>)*

	RECRUITMENT	RETENTION
CZECH REPUBLIC	Service tariff. Performance bonus. Work-abroad allowance. Allowance for increased responsibility. Allowance for being on call. Bonuses.	
FRANCE	Attractive basic pay. Special bonus for military life.	Bonus for special skill. Bonus for interventions abroad. Special bonus for married employees and children.
	Non-monetary incentives; a career path and promotion schemes play a major role in the enlistment of new recruits and for the decision to stay.	
NETHERLANDS	Substantial improvement in pay and benefits packages. Free driving licence. Possibilities for soldiers to take civilian courses and prepare for a civilian diploma free-of-charge. All kinds of military courses are certified in order for civilian employers to acknowledge the acquired skills and knowledge of ex-military personnel. Familiarization week with the Army. Orientation year (age 17-18), 65% of them join the armed forces at age of 18. Second chance for applicants who fail the physical test. Extension of military basic training from 3 to 4 months. 100 open recruitment offices.	Pay and benefits package.
SPAIN	Advertising campaign. Computerized recruitment management system. INFO Hotline. Enlistment Bonus. Strategies for lowering the drop-out rate during the selection process.	Compensation for students. Re-enlistment bonus. Benefits for service time. Family benefits. Housing benefits. Promotion and job opportunities. Individual motivation plan.
UK	Attractive basic pay. Housing. Free medical and dental treatment for military personnel and their families. All driving qualifications are paid for. 38 days of paid leave. Subsidized food and accommodation. Free gym and sports facilities. Free pension. Lower council tax. Special life insurance policy. 34% discount for most train tickets (families included). Special discounts for army personnel.	
USA	Basic pay – Active Duty pay (annual pay adjustment) Special and Incentive pay; hardship duty pay, hostile fire pay, imminent danger pay, assignment incentive pay, hazardous duty incentive pay. Allowances; basic allowances for subsistence, housing, clothing, dislocation, family separation, family subsistence supplemental allowance. Tax; combat zone tax exclusion, tax exempt allowances Recoupment. Retirement.	

Conclusion The empirical review in this article leads us to the conclusion that we cannot identify a successful strategic approach in the field of military personnel policy in the SAF. In last decade, an attractive personnel policy evidently failed because of the lack of understanding of the seriousness of the demographic and economic pressures which the SAF was and still is exposed to on the labour market. Understanding this, the Ministry of Defence of the Republic of Slovenia in its Annual Report (MOD RS for 2016)²⁴ recognized human resources as a high-probability risk, which they will try to mitigate with more effective use. A Working Group of the SAF and MOD established and executed 43 tasks in order to achieve a higher RSR in 2016-17. They tended to raise the efficiency of all recruitment procedures, but the enlisted RSR remained at a very low level for both years (2016-17), which reminds us once again of the fact that many studies of military recruitment and retention prove that they are most sensitive to cash pay and benefits.

Individualism in democratic societies puts even more pressure on military organizations, so they have to be even more flexible. Due to the fact that military organizations totally depend on public funds, the power constellations are within the political system that controls the funding, so the political and societal decisions that influence the funding levels of the military organization and employment of personnel play a decisive role in the success or failure of the recruitment and retention of military personnel in the SAF.

From a distance of fifteen years after introducing professionalization in the armed forces, it is evident that the SAF was not exposed to “the military way²⁵” of development, but much more to the way of civilianization. Abandoning conscription and stepping forward to a professional army is not easy task, so we can concur with Young (2017, p.139) who believes that: “the key weakness has been the present failure of HRM, which has occurred due to a simple lack of coherent personnel policies”.

Hartley (2010) argues that because of the fall in real defence budgets, a nation can choose only between three different options, including:

- a policy of ‘equal misery’ (e.g. less training, delays in new equipment programmes, and low pay for military members),
- a continuation of efforts to improve efficiency (e.g. competition, outsourcing, incentive budgeting),
- or a major review of a nation’s defence commitments.

²⁴ “The prevailing risks with a very high probability of occurrence are procedural in nature and refer to the management of the main processes, especially the maintenance of the existing and establishment of the planned capabilities. The prevailing risks with a very high probability of occurrence are also of a project nature and refer to the untimely implementation of orders and measures. Additionally, risks with a very high probability of occurrence include those of financial, personnel-related and regulatory types. When talking about financial and human resources high-probability risks, it is a matter of not providing or not being able to maintain the targeted performances. This means that the MoD’s priority in the short-term must be to further strive for the effective use of the limited financial, personnel and material resources, and systematically direct them towards the implementation of the key long- and medium-term objectives.” (Annual Report MOD RS for 2016, pp.107-109).

²⁵ Vagts (1959, p.13) understands the military way as mid-way between militarization (solving civilian problems in a military way) and civilianization (solving military problems with civilian solutions).

There is a considerable reason to believe that in the future the SAF will be exposed to tremendous quantitative and qualitative recruitment and retention challenges, if as an organization it is not recognized as a much more reliable and attractive employer on the highly competitive labour market.

We can argue that, in the case of Slovenia, where the demographic deficit is exceptional, one of the most reasonable courses of action could be a consecutive sharing of human resources inside the intra-security organization within the state. Sharing of human resources would mean that, after serving a certain number of years in the SAF, a soldier could be easily prequalified for serving in the civilian police, customs service, firefighting units, judicial unit, and so on. This new HRM approach could have a very positive impact on youth who desire to join the SAF. As an organization, it would be immediately recognized as a much more reliable and attractive employer on the labour market, because it would be capable of offering indefinite employment. Furthermore, basic military salaries should be higher (much closer to the gross average yearly wage for newly enlisted members) and also we should analyze and finally decide, what type, and to which level, compensations and benefits are suitable and most cost-efficient for the SAF. Usually, adaptation during wartime and innovations of armed forces in peacetime occur when military units are exposed to a huge organizational default, or when political leaders with legitimate authority over the armed forces recognize the challenge and need to promote the process of innovation.

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REZERVNA SESTAVA: SAMOSTOJNA OBRAVNAVA IN PRIMERJAVA S TEŽAVAMI STALNE SESTAVE

RESERVE FORCE: UNIQUE CONSIDERATIONS AND A COMPARISON WITH REGULAR FORCE ISSUES

Povzetek Rezervna sestava kanadskih oboroženih sil (CAF) je sestavljena iz več komponent. Največja komponenta je primarna rezervna sestava (P Res), katere namen je dopolnjevanje redne sestave (Reg F) pri delovanju doma in v tujini. Vloge pripadnikov stalne in primarne rezerve sestave so zato podobne, obstajajo pa tudi pomembni samostojni vidiki. Sodelovanje v primarni rezervni komponenti lahko prinese bistveno drugačne izkušnje in izzive, povezane z zadrževanjem kadra. V tem članku primerjamo podatke iz dveh nedavnih velikih raziskav: ankete kanadskih oboroženih sil o zadrževanju kadra v stalni sestavi (CAF Reg F Retention Survey) (n = 1.956) in ankete kanadskih oboroženih sil o zadrževanju kadra v rezervni sestavi (CAF Reserve Force Retention Survey) (n = 3.669). Rezultati so pokazali, da je tako pri pripadnikih stalne sestave kot pri pripadnikih rezervne sestave prisoten konflikt med njihovimi vojaškimi, civilnimi in zasebnimi vlogami, čeprav na različne načine. Iz rezultatov je prav tako mogoče sklepati, da so pogoste domneve, da naj bi pripadniki stalne sestave rezerviste dojemali kot manj predane od njih, neutemeljene. Presenetljivo je, da je bila čustvena in normativna predanost rezervistov višja od predanosti pripadnikov stalne sestave, razlog njihovega odhoda pa pogosto povezan z željo po večji in ne manjši vpetosti v vojsko. Priporočila avtorjev se osredotočajo predvsem na izboljšanje ravnovesja med poklicnim in zasebnim življenjem pripadnikov ter na enakost med komponentami.

Ključne besede *Kanadske oborožene sile, stalna sestava, primarna rezerva, rezervna sestava, zadrževanje kadra.*

Abstract The Canadian Armed Forces (CAF) Reserve Force comprises several subcomponents. The largest is the Primary Reserve (P Res), whose purpose is to supplement the Regular Force (Reg F) in operations at home and abroad. As such, there is similarity in the roles of Reg F and P Res members, but also important unique aspects.

Membership of a primarily part-time force may result in significantly different experiences and retention-related challenges. This article compares data from two recent large-scale surveys: the CAF Reg F Retention Survey ($n = 1,956$) and the CAF Reserve Force Retention Survey ($n = 3,669$). The results indicated that both the Reg F members and the reservists experience conflict between their military, civilian, and personal roles, albeit in different ways. They also suggest that Reg F members' oft-cited perceptions of reservists as being less dedicated than themselves are unfounded. Surprisingly, the reservists' affective and normative commitment was higher than the Reg F members', and their reasons for leaving often focused on a desire to be more, rather than less, involved with the military. Recommendations focus on improving work-life balance and equity between the components.

Key words *Canadian Armed Forces, Regular Force, Primary Reserve, Reserve Force, retention*

Introduction As in many other countries, the Canadian Armed Forces (CAF) include both regular and reserve components. Whereas the Regular Force (Reg F) comprises full-time members who participate in domestic and overseas operations, the Primary Reserve (P Res) is a primarily part-time force whose main role is to support and supplement the Reg F at home and abroad. Like the Reg F, members of the P Res serve in all three environments: air, land, and sea. Thus, most occupations exist in both components (e.g. naval communicator, pilot, cook).

Most research on military personnel is focused on the Reg F, and although conclusions from these studies are often extended to reservists, this practice may overlook the unique considerations and important distinctions between the two groups. Furthermore, one of the biggest differences between the components is the fact that, in addition to personal and family obligations, many reservists also pursue civilian employment (49.5%) or schooling (25.1%), thus engaging in dual civilian and military roles to a greater extent than Reg F members (Anderson, 2017; Anderson & Goldenberg, in preparation; Hadziomerovic & Simpson, 2013). For this reason, some previous research has fruitfully considered reserve service from a role conflict perspective (Griffith, 2009). To the extent that reservists experience role conflict, these competing demands may be associated with attrition (Van Sell, Brief, & Schuler, 1981). In the present research, we consider the impact of competing demands on both reservists and Reg F members.

Holding multiple roles is more feasible for reservists because of the largely part-time nature of service in the P Res. Whereas members of the Reg F serve full-time, Canadian reservists transition often between three classes of service. At any given time, 70.8% of reservists are on Class A service, which is non-operational and part-time; typically, it includes training one evening per week and one weekend per month (Anderson, 2017). Another 27.3% are on Class B service, which is full-time and non-operational, encompassing periods of service of between two weeks and three

years. Finally, a small number (2.0%) are on Class C service, which is full-time and operational, and includes international and domestic deployments. In the CAF, an individual reservist could be Class A for months at a time, then take a two-week Class B assignment, return to Class A, and later deploy as Class C. The potential frequency of these transitions has even led researchers to refer to reservists as *transmigrants* (Lomsky-Feder, Gazit, & Ben-Ari, 2008). Reservists often live in a state of flux, within which they must balance competing military and civilian obligations.

Conversely, members of the Reg F are subject to significant demands and conditions of employment that reservists are not. Whereas reservists are subject to class of service instability, Reg F members are subject to geographic instability because they are posted by the CAF every few years. This can significantly affect Reg F members' well-being, as well as that of their families (Pepin, Sudom, & Dunn, 2006; Segal, 1999; Sudom, 2012). Another notable demand on Reg F members is the requirement to deploy on operations, which often entails not just lengthy separations from home and family, but also the risk of physical harm. Indeed, among the most notable differences between the Regular and Reserve Forces – although it may often be forgotten day-to-day – is the concept of *unlimited liability* as it applies to the Reg F. Members of the Reg F can be ordered to take actions that civilians and members of the Reserve Force¹ are not, up to and including placing themselves in harm's way. This requirement of Reg F service is one that may have profound effects on members' relationship with the organization, relative to the Reserve Force. That said, the effects of unlimited liability on work and organizational variables cannot be teased out by the present analyses, which entail broad comparison of the two populations; however, it is worth bearing in mind as a potential source of influence.

In describing the differences in Reg F members' and reservists' roles and responsibilities above, we hinted at the fact that there may also be differences in their relationships with the CAF. Previous research has demonstrated reservists' complicated relationship with their militaries. Although most nations are dedicated to maintaining and strengthening their reserve forces (e.g. Department of National Defence, 2017; National Defense Authorization Act, 2017; WFA Narrative, 2015), Canadian and international research has shown repeatedly that reservists are subject to doubt and negative stereotyping from members of the Reg F, or treatment as "second-class soldiers" (e.g. Department of National Defence, 1994; Fraser, 2013; Hadziomerovic & Simpson, 2013; Keene, 2015; Parry, Connelly, Robinson, Robinson, & Taylor, 2013; Standing Committee on Public Accounts, 2016).

This literature suggests that Reg F members' doubts focus on two key characteristics of reservists: their competence and dedication. Although competence is beyond the scope of our self-report data, we consider dedication. Doubts about reservists' dedication may be explained in part by Moskos' (1988) conceptualization of military service on the occupational-institutional continuum. Viewing military service from

¹ *Except under extenuating circumstances.*

an institutional perspective (including ascribing to its values, norms, and principles) rather than an occupational perspective (including emphasis on transactional aspects such as pay), creates a sense of loyalty and duty. To the extent that reservists are assumed to view their service as occupational because they serve part-time and often dedicate themselves to another vocation in addition to their military service, this may explain doubts about reservists' commitment to the military. The present analyses address that commitment directly. Further, it is seemingly inevitable that if reservists feel unappreciated and misperceived, such perceptions would play a role in their job satisfaction and retention, as previous research suggests. The present analyses can also address this proposition.

The general aim of this article is to provide a broad comparison of reservists and Reg F members with respect to satisfaction with aspects of their work, commitment, and retention. More specifically, we use the previous research and theory described above as a lens through which to interpret differences between these two groups. Our intention is to provide an understanding of possible component-specific issues related to retention of CAF personnel, and a better understanding of the importance of considering reservists as a unique group.

1 METHOD

This article includes data from the *2016 Reg F Retention Survey* and the *2015 Reserve Force Retention Survey*.² These surveys are administered regularly by the Director General Military Personnel Research and Analysis (DGMPRA) in support of the *CAF Military Personnel Retention Strategy* (Chief Military Personnel, 2009) and the *Reserve Strategy 2015* (Chief of the Defence Staff, 2015).

1.1 Procedure

The *2016 Reg F Retention Survey* was administered electronically between September and December 2016. In total, 1,956 Reg F³ respondents completed the survey, yielding a response rate of 41.3%, and an overall margin of error of $\pm 2.2\%$ with 95% confidence (Bremner & Budgell, 2017; Goldenberg & Ebel-Lam, 2017).

² The *CAF Regular Force Retention Survey* is designed and administered by the Recruitment and Retention Section of Director General Military Personnel Research and Analysis (DGMPRA) in the Department of National Defence. The quantitative analyses of the Regular Force data were carried out by Bremner and Budgell (2017) as specified in the Statement of Work provided by Goldenberg (2016); the qualitative analyses of the Regular Force data were carried out by Lee, Eren, and Budgell (2017) as specified by the statement of work by Goldenberg (2017); the qualitative analyses of the Reserve Force data were carried out by Yeung, Sanders, Eren, and Budgell (2017) as specified in the statement of work by Anderson (2016). Unless otherwise noted, the quantitative results described in this article for the Regular and Reserve Forces were first reported in Bremner and Budgell (2017) and Anderson (2017), respectively. Similarly, the qualitative results for the Regular and Reserve Forces were first reported in Lee, Eren, and Budgell (2017) and Yeung, Sanders, Eren, and Budgell (2017), respectively.

³ The *CAF Regular Force* comprises more than 51,000 full-time officers and non-commissioned members.

The *2015 Reserve Force Retention Survey* was administered electronically from November 2015 to January 2016. In total, 3,669 P Res respondents⁴ completed the survey, yielding a response rate of 36.9%, and an overall margin of error of $\pm 1.5\%$ with 95% confidence (Anderson, 2017).

For the present analyses, population estimates based on weighted data are provided for each of the two components, which allows for a general assessment of the pattern of differences. However, we did not conduct tests of statistical significance because these two data sets were sampled from different populations at different time points, with different underlying weighting procedures. For the *2016 Reg F Retention Survey*, weights were based on members' rank and occupational authority (i.e. the authority to whom their trade is answerable: the Chief of the Air Force Staff, Army Staff, Naval Staff, or Military Personnel⁵). For the *2015 Reserve Force Retention Survey*, weights were based on members' rank, classes of service in the past 12 months,⁶ and environment (i.e. air, land, or sea).⁷ Thus, although the methods were quite similar – allowing for the addition of service class, an important variable that does not apply to Reg F members – they were not identical. Given these differences, as well as the different time points, formal inferential tests would be inappropriate. This puts limitations on interpretation; however, because a broad comparison of differences can be useful, in this article we use logical interpretation to discuss potentially meaningful differences between the two components. Given the nature of these data, this is the most practical and intuitively meaningful approach.

1.2 Participants

The *2016 Reg F Retention Survey* and the *2015 Reserve Force Retention Survey* were administered to stratified random samples of personnel from their respective populations. Table 1 presents the sample and population breakdowns by rank, years of service (YOS), age, gender, and first official language (FOL).

Observing Table 1, it is evident that the Reg F and the P Res have similar demographic characteristics. In terms of rank, both are primarily made up of non-commissioned members (NCMs), particularly in the junior ranks (Sergeant and below). Both forces also have large proportions of members with 5 to 14 years of service (YOS) and both show similar majorities of male members and members who speak English as their FOL. Of all the demographic factors, the only notable difference between the two

⁴ The CAF Reserve Force comprises four sub-components. The P Res is the largest sub-component and the one that is most comparable to the Regular Force. It comprises more than 26,000 officers and non-commissioned members.

⁵ Members falling under the authority of the (Assistant) Chief of Military Personnel are those in occupations that are needed across all elements, or the 'purple trades' (e.g. health services, logistics).

⁶ Members were divided into three categories: part-time (Class A) only, full-time (Class B or C) only, or a mix of part- and full-time service.

⁷ Although similar to occupational authority, environment is somewhat different in that members under the authority of the (Assistant) Chief of Military Personnel are categorized according to their assigned environment (i.e., air, land, or sea), resulting in three categories rather than four.

forces is that the P Res has a larger proportion of young, early-career members than the Reg F: that is, members under the age of 25 and with fewer than 5 YOS.

Some differences between the samples and the populations from which they were drawn were evident, which is common for CAF surveys (e.g. Eren & Budgell, 2015; Koundakjian, 2014). For this reason the analyses were conducted using weighted data.

Table 1:
Sample and
population
characteristics

Groups	Regular Force (%)		P Res (%)	
	Sample (%)	Population (%)	Sample (%)	Population (%)
Rank				
Junior NCM	28.6	54.0	38.6	62.8
Senior NCM	21.9	24.6	25.3	19.0
Junior Officer	29.3	12.1	22.0	12.3
Senior Officer	20.2	9.3	14.1	5.8
YOS				
0 – 4	3.8	16.5	13.8	29.9
5 – 14	33.2	49.3	35.6	46.9
15 – 24	35.1	18.1	19.3	14.5
25 +	27.9	16.1	31.3	8.7
Age				
16 – 24	3.2	7.0	11.7	25.8
25 – 34	30.5	38.2	28.2	33.6
35 – 44	34.8	30.8	22.2	16.5
45 +	31.4	24.0	37.9	24.1
Gender				
Male	85.2	85.7	77.4	83.4
Female	14.8	14.3	22.6	16.6
FOL				
English	87.2	73.3	75.4	75.9
French	12.8	26.7	24.6	24.1

1.3 Measures

The Reg F and Reserve Force Retention Surveys are omnibus surveys, including a range of measures related to aspects of members’ military service. The respondents’ experiences, attitudes, perceptions, and opinions with regard to work and organizational issues were assessed in both surveys, although some measures differed slightly. This article compares the results from some of the most relevant measures that were common to both surveys; these are described briefly below. Detailed descriptions of all measures, results, and the complete survey instruments can be found in Bremner and Budgell (2017) and Anderson (2017).

1.3.1 Organizational commitment

Both surveys included Meyer, Allen, and Smith's (1993) measure of organizational commitment, which respondents rated on a 6-point scale ranging from 1, *strongly disagree*, to 6, *strongly agree*. Specifically, this scale measures three aspects of organizational commitment: affective (i.e. emotional attachment to the organization, e.g. "The CAF [Reserve Force] has a great deal of personal meaning for me"); normative (i.e. feelings of obligation to stay, e.g. "The CAF [Reserve Force] deserves my loyalty"); and continuance (i.e. perceived costs of leaving, e.g. "Too much of my life would be disrupted if I decided to leave the CAF [Reserves] now").

1.3.2 Satisfaction with key aspects of work and the organization

Both surveys included a range of items assessing members' satisfaction with aspects of their work and the organization. Although many of these aspects were measured similarly on the two surveys, items making up those measures often differed, reflecting the key differences in service in the Regular and Reserve components. For example, although both surveys measured satisfaction with the CAF's support for members' families, the Reg F Retention Survey included items addressing the quality of that support under different circumstances (e.g. posting, deployment), whereas the Reserve Force Retention Survey focused on the distinction between quality and availability of support, because for reservists (who do not live on or necessarily even near a base), access to support is a key issue. For this article, we attempted to balance our desire to consider as many relevant factors as possible with the need for consistency of items. Thus, we present all reasonably comparable⁸ items and scales that pertained to satisfaction with broad work and organizational factors.

In the present analyses, we included measures of satisfaction with the fairness of selection for career courses (a key aspect of career progression), rate of promotion, future promotion opportunities, rate of pay, medical and dental benefits, and overall work-life balance. All of these items were developed internally for use in CAF surveys. They were measured on six-point Likert-type scales anchored at 1, *completely dissatisfied*, and 6, *completely satisfied*.

In addition, we considered satisfaction with unit leadership, which was developed internally and measured using a scale of seven items (e.g. "The way your unit leaders build teamwork and cohesion"). This was measured on a 6-point scale from 1, *completely dissatisfied*, to 6, *completely satisfied*.⁹

Finally, we also consider overall job satisfaction, measured using the three-item Job in General Scale (Ironson, Smith, Brannick, Gibson, & Paul, 1989; e.g. "All in all,

⁸ In some cases, the items compared had minor differences in wording between the two surveys (e.g. whereas Reg F members rated their satisfaction with "CAF medical and dental benefits," the P Res item included the words "available to you", to reflect that CAF benefits depend on the member's component and class of service).

⁹ When we report the percentage of members who are satisfied with unit leadership, it refers to those whose score on the mean composite is above the scale midpoint of 3.5.

I am satisfied with my job [as a Reservist¹⁰]). Reg F respondents rated these items on the original 5-point scale from 1, *strongly disagree*, to 5, *strongly agree*, with a neutral midpoint (*neither agree nor disagree*). P Res respondents used a 6-point scale from 1, *strongly disagree*, to 6, *strongly agree*, with no midpoint.¹¹

1.3.3 Measures specific to the P Res

For this article, we considered a few additional measures and items from the Reserve Force Retention Survey. These do not have a parallel for the Reg F, so we did not make any comparisons. However, consideration of these factors will further inform reservist-specific retention issues, and may provide additional insight into how the two forces differ.

Specifically, we present the reservists' satisfaction with their combined military and civilian pay and their satisfaction with their pay compared to Reg F pay. Both of these items were developed internally and measured on 6-point scales ranging from 1, *completely dissatisfied*, to 6, *completely satisfied*. We also consider items assessing how reservists see themselves, and their beliefs about how they are perceived by members of the Reg F ("When you/members of the Regular Force think of Reservists, you/they see them as... intelligent/dedicated/important to the CAF"). These additional analyses, directly referring to the Reg F, are interesting because of the role of the P Res as a supplement to the Reg F. Reg F members and reservists perform very similar jobs, so any perceived disparities in treatment are likely to be very salient to them.

1.3.4 Intentions to leave

Both surveys included items assessing members' level of intention to leave the CAF within the next year, three years, and five years, or to stay until their compulsory retirement age (CRA).¹² These four items were developed internally for use on CAF surveys and were all measured using a five-point scale labelled as 1 (*definitely not*), 2 (*probably not*), 3 (*uncertain*), 4 (*probably yes*), and 5 (*definitely yes*).

1.3.5 Main reasons for leaving

Both Reg F and P Res respondents who indicated that they would probably or definitely leave their component within five years for reasons other than reaching CRA were asked to select their main reasons for leaving from a list (e.g. dissatisfaction with pay). These lists differed slightly between the two components, reflecting their differing circumstances.

¹⁰ Added to ensure that reservists would not answer with respect to civilian employment.

¹¹ The latter scale was modified to be consistent with the other agreement scales in the survey. In this report, we compared the percentage of members satisfied with their jobs in general (i.e. with average responses above the respective scale midpoints) rather than scale means, as they are more comparable.

¹² CRA is 60 for members who joined the CAF July 1, 2004 or later. Some members who began their service prior to that date have a CRA of 55 if they did not opt to change it.

1.3.6 Recommendations from participants

Finally, both surveys included open-ended questions at the end, one of which solicited recommendations from members for improving retention. These were framed slightly differently in the two surveys. The Reg F survey asked, “If you are considering leaving the CAF within the next five years for reasons other than retirement, what changes could the CAF make to persuade you to stay?” The Reserve Force survey asked, “If you could talk directly to senior decision-makers within the Reserve Force, what one or two things would you tell them to focus on improving?” Coding schemes were developed for each open-ended question and used to code the responses into themes.

2 RESULTS

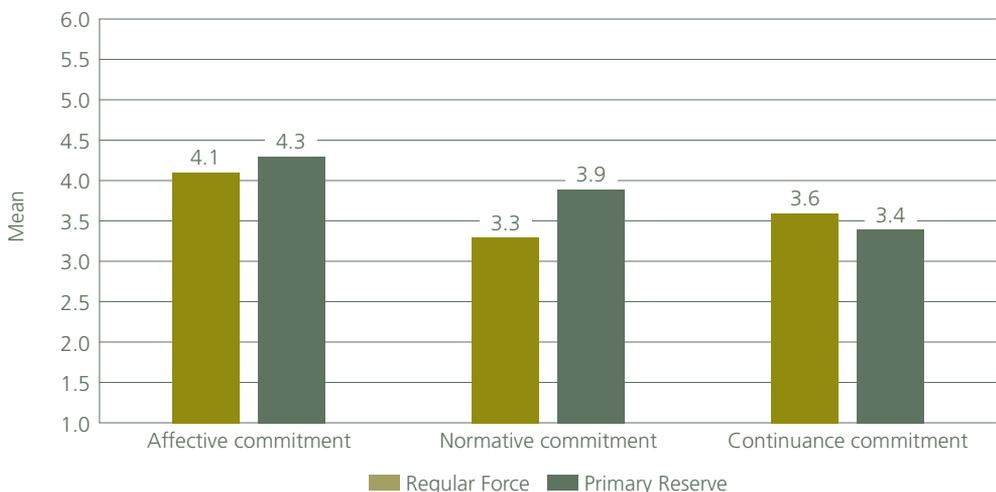
2.1 Organizational commitment

As illustrated in Figure 1, reservists had notably higher mean levels of normative commitment than Reg F members, indicating that they have greater feelings of obligation or duty to stay. They also had slightly higher levels of affective commitment (i.e. emotional attachment) and slightly lower levels of continuance commitment, which indicates they feel it is less of a necessity to stay.

2.2 Satisfaction with key aspects of work and the organization

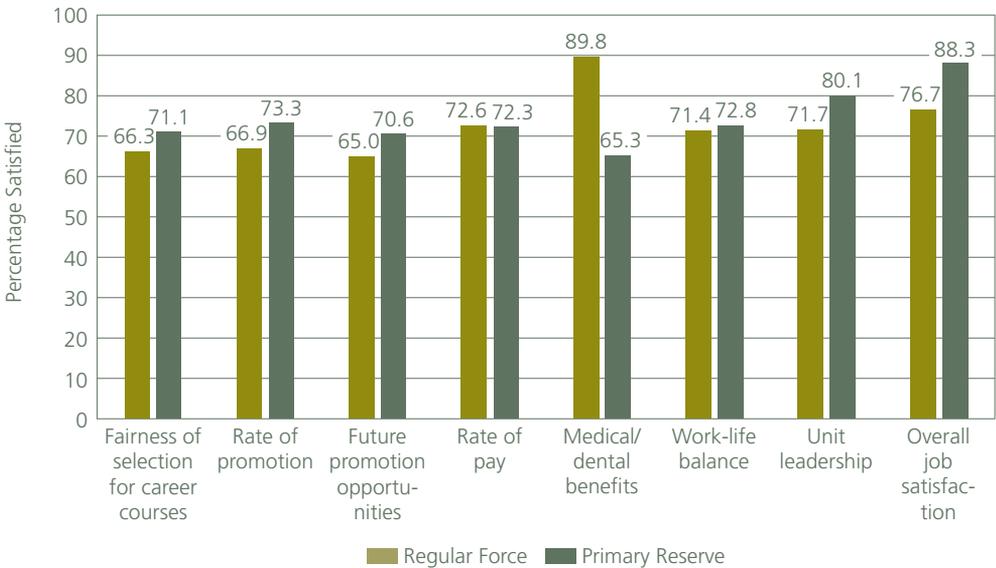
Survey respondents from the Reg F and the P Res were asked to indicate their level of satisfaction with major work and organizational factors. Figure 2 depicts the percentage of members in each component who are satisfied with key aspects of

Figure 1:
Estimated
organizational
commitment for
members of
the Reg F
and P Res



their work and their organization.¹³ First, an examination of the variables related to career progression suggests that the P Res respondents were slightly more satisfied than the Reg F respondents with the fairness of selection for career courses, rate of promotion, and future promotion opportunities. Similar proportions (almost three-quarters) of the Reg F and the P Res respondents were satisfied with their rates of pay; however, a substantially greater proportion of the Reg F members were satisfied with their medical and dental benefits (89.8%) than the reservists (65.3%). Similar proportions (approximately 72%) were satisfied with their work-life balance. A substantially greater proportion of the reservists were satisfied with the leadership of their units than the Reg F members. Finally, the proportion of the reservists reporting overall job satisfaction was notably higher than that of the Reg F members.

Figure 2: Estimated satisfaction with selected work and organizational factors for members of the Reg F and P Res



2.3 Measures specific to the P Res

The Reserve Force Retention Survey included many questions that did not apply to members of the Reg F. This section includes those that are most relevant to a comparison of the two components.

2.3.1 Combined military and civilian pay

The reservists were asked to indicate their level of satisfaction with their combined military and civilian pay. Most reservists (83.8%) were satisfied with their total pay

¹³ Specifically, the percentages include respondents who indicated somewhat agree, agree, or strongly agree on average with these satisfaction items, which were measured on 6-point scales ranging from 1, strongly disagree, to 6, strongly agree.

from those combined sources; this is notably higher than the percentage of reservists who were satisfied with their rate of (military) pay (72.3%), as reported above.

2.3.2 Pay compared to the Reg F

The reservists were also asked to indicate their level of satisfaction with their pay compared to the Reg F. Satisfaction with pay was quite low in the context of this direct comparison; 51.1% of the reservists were at least somewhat dissatisfied with their pay compared to the Reg F.

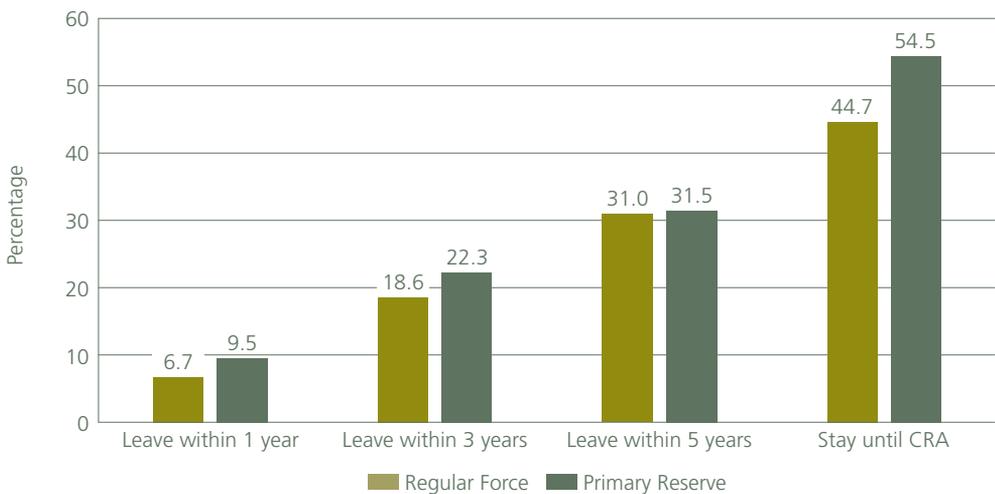
2.3.3 How reservists are perceived – self-perceptions and beliefs

The reservists were asked how they perceive themselves (reservists) as a group, as well as how they think members of the Reg F perceive them. Unsurprisingly, the reservists typically rated themselves positively on the three descriptors: 93.0% at least somewhat agreed that reservists are intelligent, 88.8% that they are dedicated, and 92.7% that they are important to the CAF. However, as found in previous research, the reservists' beliefs about how members of the Reg F perceive them were quite negative: Fewer than half (47.4%) agreed that Reg F members perceive them as intelligent. Even worse, only about a third of the reservists believed that Reg F members perceive them to be dedicated (37.2%) or important to the CAF (33.2%).

2.4 Intentions to leave

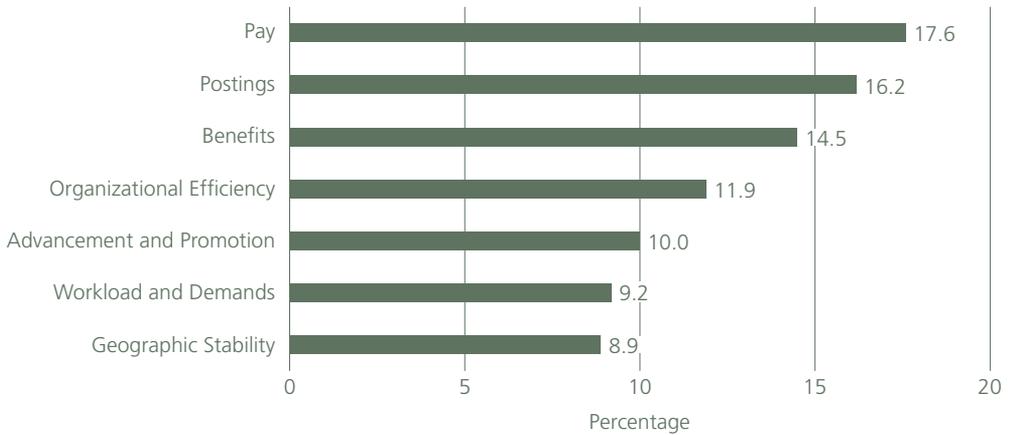
Figure 3 depicts the percentage of people in each component who indicated the intention to leave within one year, three years, five years, or the intention to stay until CRA.¹⁴ It appears that reservists may be more likely than Reg F members to leave

Figure 3:
Estimated
organizational
commitment for
members of
the Reg F
and P Res



¹⁴ Percentages include respondents who indicated probably yes, and definitely yes.

Figure 4:
Suggested
areas of
improvement
in the Reg F



within one year and within three years; however, comparable proportions intended to leave within five years. Interestingly, the reservists were also notably more likely to indicate the intention to stay until CRA than the Reg F members.

2.5 Main reasons for leaving

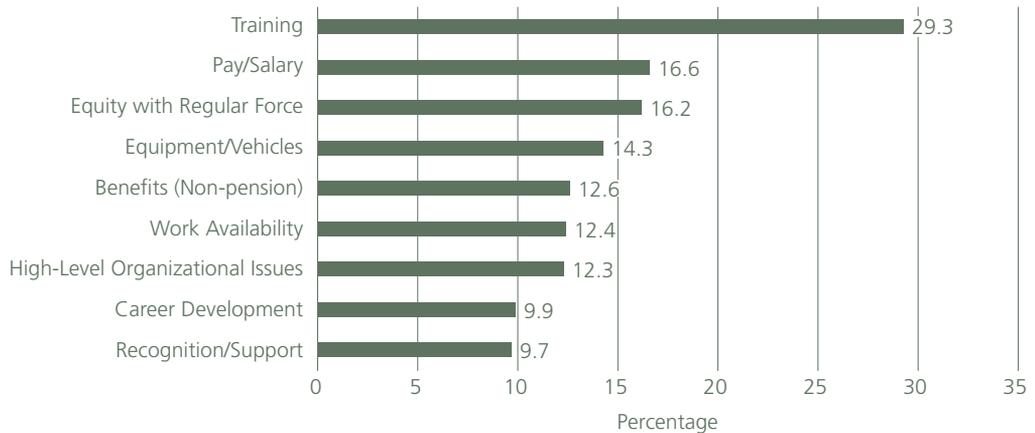
The Reg F and the P Res respondents' most common reasons for leaving are presented in Table 2. As shown, the Reg F members were more likely than the reservists to leave due to job dissatisfaction, the impact of CAF employment on their spouse/partner, dissatisfaction with their CAF occupation (6.5% of the reservists; not shown in the Table), the impact of CAF employment on their children (8.7% of the reservists), and promotion dissatisfaction (7.0% of the reservists). On the other hand, reservists appear to be more likely than Reg F members to intend to leave their component by obtaining a component transfer (CT; 3.8% of the Reg F members), or because of dissatisfaction with training (4.8% of the Reg F members). The proportions of members leaving because of pay dissatisfaction, a lack of meaningful or satisfying work, and retirement (i.e. eligibility for pension benefits/full retirement) were similar for the two components. Most of the other reasons are specific to the Reg F (i.e. lack of geographic stability, postings) or to P Res experience (i.e. civilian job, employment and deployment opportunities, Reserve-specific disorganization).

2.6 Participants' recommendations for improvement

The participants' recommendations for improvement, provided in the open-ended questions at the end of the two surveys, were coded to identify key themes, which are described here.¹⁵

¹⁵ Because of differences in how the question was framed on the two surveys, the results are not directly comparable. However, both provide insights into suggested improvements that could increase retention.

Figure 5:
Suggested
areas of
improvement
in the P Res



For members of the Reg F, the most frequent suggestions for improvement were related to pay, which were made by 17.6% of respondents. Changes to aspects of postings accounted for the second most common theme (16.2%), followed by improving benefits (14.5%), increasing organizational efficiency (11.9%), improving advancement and promotion opportunities (10.0%), decreasing workload and demands (9.2%), and increasing geographic stability (8.9%). These most common suggestions for change are depicted in Figure 4.

For the reservists, by far the greatest number of suggestions related to training (29.3%; e.g. “More focus on training instead of admin”). Other common suggestions pertained to pay/salary (16.6%), equity with the Reg F (16.2%), equipment/vehicles (14.3%), benefits other than pension (12.6%), work availability (12.4%), high-level organizational issues (12.3%), career development (9.9%), and recognition/support (9.7%). These most common suggestions are depicted in Figure 5.

3 DISCUSSION

Overall, the results of our analyses demonstrate a fair degree of similarity between the members of the Reg F and the P Res members. However, several areas of divergence and uniqueness are worthy of consideration, particularly in light of the theoretical considerations outlined in the introduction.

3.1 Conflicts between military, civilian, and family roles

Members of both the Regular and Reserve Forces hold multiple roles in their work and personal lives: military service, spouses, families, and other personal commitments. Both groups may therefore be susceptible to role conflict, but this study suggests differences in how that role conflict may manifest.

A defining aspect of regular service is geographic instability produced by frequent postings and deployment. The impact of this instability was visible in these analyses in a way that was not mirrored for Reserve Force respondents. First, 15.6% of Reg F members listed geographic instability as one of their top three reasons for leaving the CAF; in addition, increasing geographic stability was one of the most common suggestions for improving retention in the open-ended comments. Similarly, posting dissatisfaction was a reason for leaving for 10.7% of the Reg F members, and the highly related category of suggestions related to postings (and the associated relocation) was the second most common category of recommendations for improving retention. We posit that these specifics are likely related to a broader consideration, i.e. the impact of Reg F service on spouses and children, which is high when the family has to be relocated frequently. Indeed, the impact of service on spouses and children was listed as a reason for leaving by 23.1% and 17.3% of the Reg F members, respectively. Put another way, the impact on spouses was the second most important reason for leaving the Reg F, preceded only by job dissatisfaction.

Unlike Reg F members, reservists are not subject to geographic instability. Perhaps for this reason, the impact of service on spouses was a much less common reason for leaving among the reservists (11.3%) than among the Reg F members. Reservists, however, must often balance military and civilian employment, which presents other challenges that may affect retention. Indeed, this is reflected in one of reservists' top reasons for leaving: impact on their civilian jobs (15.9%).

Thus, the present analyses suggest that retention in both components is strongly affected by conflict between various aspects of the members' lives. For the Reg F members, the challenges appear to revolve around family and geographic instability. For the reservists, although family is also an important consideration, it may be less affected. However, impact on civilian employment emerged as a key consideration.

3.2 Reservists' desire to contribute

As described in the introduction, cross-national research suggests that Reg F military personnel hold significant doubts about reservists' dedication to the military. Insofar as these doubts exist, our data indicates that they are not warranted. The reservists' top reasons for intending to leave were largely work- and service-related. Key reasons included a lack of employment opportunities in the Reserve Force (16.9%), a lack of deployment opportunities (14.3%), and dissatisfaction with training and development (12.0%). These reasons suggest that, despite the many demands on reservists' time, many members want to be *more* involved with the P Res, not less – to the point that they may leave because they are dissatisfied with their level of available involvement. Further, the reservists' most common suggestions for senior leaders included improvements and additions to training, and increasing Reserve Force work availability. Finally, the single most frequently cited reason for leaving the reserves was to join the Reg F – another indication that many reservists want to be more involved with military service than they can be in the Reserve Force.

These results suggest that perceptions of reservists by Reg F members and others as less professional or committed may not be warranted. This proposition is explored further below.

3.3 Dedication and commitment

Further to the above, we also considered both actual commitment and perceptions of commitment and competence.

The present data show that most reservists described themselves (as a group) as dedicated to the force. Beyond that self-perception, population means suggest that reservists actually are somewhat more affectively and normatively committed than Reg F members. That is, reservists appeared to have slightly stronger emotional ties to the organization (i.e. affective commitment) and were substantially more likely to say that they felt a sense of obligation or duty to stay (i.e. normative commitment) than Reg F members.

Far from indicating that reservists take an occupational view of their military service (Moskos, 1988), these results suggest the opposite: reservists may be more likely to take an institutional view. Griffith's (2009) social identity perspective on reserve service offers one potential explanation. Drawing on Tajfel and Turner's (1979) seminal theory, Griffith proposed that reservists will identify strongly with the reserves to the extent that they have strong bonds with their unit. The present analyses indicated that reservists were substantially more satisfied with their jobs overall and were more satisfied with their unit leadership than Reg F members, which may support bonding within the unit. Although this provides only oblique evidence of Griffith's proposal, it is supported by previous research demonstrating that in the CAF P Res, unit cohesion is strong, and is also the best predictor of retention (Anderson, 2017).

This study does not and cannot speak to reservists' competence. A recent audit of the Army Reserve suggest that reservists are indeed less trained and prepared for deployment than Reg F members (Office of the Auditor General, 2016). That said, this study suggests that any differences between Reg F members and reservists in this domain do not stem from a motivational deficit, as doubts about dedication would suggest. Given the nature of the reservists' suggestions for improvement, of which improvements in training were by far the most frequent, they would strongly prefer to receive training and equipment on a par with Reg F members. Although this finding cannot speak to actual competence, it strongly suggests that reservists are motivated – they desire access to the tools necessary to maintain or improve their ability to contribute to the CAF.

3.4 Desire for equity and recognition

The reservists in this study were clearly aware that they are perceived by Reg F members as less dedicated and competent, whereas their self-perceptions indicate

that they do not agree with that assessment. The sense that they are not valued relative to the Reg F came through in their suggestions for improvement. Recognition, support, and explicit requests for greater equity with the Reg F featured among their most common suggestions, as it has in past reserve research. Suggestions relating to training, pay, access to better equipment and vehicles, and benefits may also speak to a desire for equity, in that Reg F members are generally more advantaged in all of these domains (Goldenberg & Anderson, in press; Yeung et al., 2017). When asked directly how satisfied they were with their pay compared to the Reg F, the reservists' feelings of inequity were clearly visible there too, with only half indicating satisfaction. In sum, this study indicates that CAF reservists feel undervalued along some key dimensions, which ultimately contributes to attrition from the P Res.

3.5 Implications for retention

Although they must be interpreted cautiously, these findings imply two major areas of impact on retention. For both the Reg F and the P Res, conflict between members' roles are clearly important to retention: primarily between military and family life for Reg F members, and primarily between military and civilian work life for reservists. These findings suggest that continuing emphasis on support for military families and civilian employers is important and necessary for members' well-being and retention.

For reservists in particular, the other major source of dissatisfaction and attrition stems from oft-cited negative or ambivalent perceptions of them. The present analyses indicated that such perceptions are not warranted, and in fact we find research to the contrary across several aspects, notably those related to dedication, commitment, and professionalism. These findings, in conjunction with research indicating that feeling appreciated and supported is crucial to job success (Eisenberger, Huntington, Hutchinson, & Sowa, 1986), strongly support whole force integration and increased messaging about the importance of reserve forces to a nation's military. Further research into the reality of reservists' dedication, commitment, and professionalism is also warranted to support these improvements.

Conclusion The current analyses indicate that, in a study of retention, it is crucial to consider the major ways in which the reserve service differs from the Reg F service. Notably, these included differences in the types of role conflict experienced; whereas family life tends to create the most conflict for Reg F members, balancing the demands of reserve duties and civilian work is a more typical source of conflict for reservists. The findings also indicate the importance of recognition and equity between the forces for the retention of reservists. They suggest that the oft-held perceptions of Canadian reservists as less dedicated and committed to service compared to members of the Reg F are unfounded; mean normative and affective commitment scores were actually somewhat higher for the reservists than for the members of the Reg F. Furthermore, many of the reasons reservists reported for leaving the service indicated disappointment with a lack of opportunities to serve, and a sizeable proportion even intended to transfer to the Reg F to continue and expand their

service. These findings all point to the value of reservists to the military, and the need for better communication about their contributions. Given the current emphasis on reserve forces and force integration in Canada and abroad, it is particularly important to promote respect and equity between regular and reserve forces, while simultaneously recognizing their unique strengths and needs. Future research could address specific means to achieve these goals.

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Elad Neemani

POPOLNJENOST IZRAELSKIH OBRAMBNIH SIL V ZAČETNIH LETIH: OD SOCIALNE KOHEZIJE DO STRATEŠKE KRIZE NA PODROČJU PRIDOBIVANJA IN ZADRŽEVANJA KADRA

ISRAEL DEFENCE FORCES MANPOWER IN ITS EARLY YEARS: FROM SOCIAL COHESION TO A STRATEGIC RECRUITMENT AND RETENTION CRISIS

Povzetek Članek obravnava razvoj krize zaposlovanja v izraelskih obrambnih silah med izraelsko vojno za neodvisnost in v zgodnjih letih države. Njegov namen je razširiti razumevanje organizacijskih in družbenih problemov izraelskih obrambnih sil, tako da jih opredeli kot razširjeno postkolonialno strateško krizo, ki je prizadela vse enote kopenske vojske. V nedavnih raziskavah se osredotočamo na tisti deli problema, ki zadeva predvsem teme, povezane s področjem delovanja. V članku želimo raziskave razširiti še z opisom glavnih značilnosti in meja krize. Z razumevanjem izraelskega primera se bo okrepilo naše poznavanje načina oblikovanja postkolonialnih vojsk in njihovih načinov spopadanja s svojo družbeno raznolikostjo.

Ključne besede *Civilno-vojaški odnosi, pridobivanje in zadrževanje kadra, Izrael, popolnjenost, kriza, postkolonialno obdobje.*

Abstract This article examines the evolution of the manpower crisis in the Israel Defence Forces (IDF) during the Israeli War of Independence and in the early years of the state. It aims to widen the understanding of the IDF's organizational and social problems by describing them as a post-colonial, overriding strategic crisis that affected all army units. Recent research studies have focused on parts of the issue, concentrating mainly on themes related to the field of operations. This article wishes to add to those studies by describing the main characteristics and boundaries of the crisis. Understanding the Israeli case will contribute to our knowledge of the ways post-colonial armies are formed, and their ways of coping with their social diversity.

Key words *Civil-military, recruitment and retention, Israel, manpower, crisis, post-colonial*

Introduction

The establishment of the IDF during the War of Independence was an integral part of the Israeli nation building¹ process. From the beginning, the IDF was designed to be a large, modern, technological army. For the newborn state, this was a complex organizational effort, especially during the War, in which the army had to organize and prepare for several parallel efforts. The first and the most important was the need to fight off the invading Arab forces and to win the War. Another effort was the urgent need to build the army and its units, including the fighting forces and the auxiliary forces. Other scholars who have researched social changes in the army have focused mainly on combat units (Gelber 1986; Morris 1996, 2008; Drori 2000, 2006; Turgan 2008). It seems that their focus on combat units limits the understanding of the dimensions of the crisis which, in fact, was much more widespread and affected all army units. These army efforts were parallel to the country's economic and social efforts caused by massive waves of immigrants from various nations that tripled the population of the state in just a few years.

This article aims to describe the characteristics of the manpower crisis, including non-combat aspects such as discipline issues, ethnic tensions and social issues, and the lack of professional manpower, which all contributed to the malfunction of the army during those years. Combining these issues and issues in other scholars' work will make it possible to configure and understand the depth of the manpower crisis in the first few years of the IDF. The main argument is that during the War of Independence, and even more so in the years to follow, the great immigration of the early years of the state of Israel changed Israeli society, resulting in a total and multidimensional manpower crisis, influencing all army units and soon becoming a strategic problem within the overall conception of Israel's security needs and operational activities.

At the heart of the crisis stood the changes in the Israel Defence Forces' (IDF) social composition, resulting in a change in the IDF from an ethnically homogeneous army to an ethnically heterogeneous army, suffering from a severe shortage in manpower for command and army professionals at different levels, from low-level roles such as cooks and drivers to academic professionals such as physicists and physicians. The new army was characterized by severe discipline² problems, including a large number of deserters. In the army units, problems between soldiers based on ethnic differences were very common and the cultural differences made it very hard for the commanders to manage the units. This was reflected in many operational activities. These problems, which occurred not only in the regular army but also in the reserve units, raised questions about the ability of the IDF to manage its missions. The problems that characterized the IDF in the early years were not all unique and can be found in other post-colonial armies (Barany 2014; Chari 1977;

¹ For a definition of nation building see Smith 1986, Premdas 1989, and Sheath 1973.

² Army discipline is defined as systematic action designed to provide army recruits with the army way of life and hierarchies. On the efforts made by the IDF to enforce army discipline in its first years, see Yoav Gelber 1986, *The Emergence Of a Jewish Army – the Veterans Of The British Army In The I.D.F. (Jerusalem:1986): 466-461 [Hebrew]*.

Cohen 1998). Although established under quite similar circumstances, different countries created different types of armies (Barany 2012). The differences derived from many variables, including the social composition of the post-colonial state, economic variables, and the ability of the state to allocate resources for the new army (Barany 2014, Adekson1976, Barua 1992). There are a significant number of post-colonial armies, but modern technological armies in a democratic state are rarer. There are cases like India in which similarities to the Israeli case can be found, but still the Israeli case holds several characteristics that make it unique. For example, in contrast to other post-colonial armies characterized by a low technological level, the establishment of the IDF is characterized by a continuous effort and desire to build a high-tech army based only on local manpower³ (Yitzhak 2006). That approach applied not only to command personnel but also to professional personnel and to the research and development of military technology⁴ (Neemani 2006; Barel 2009). The concept of trying to operate and develop on the basis of local potential created a gap between the ideal and reality. In reality, most of the new recruits were considered by the IDF commanders and high command to be low-level personnel with very limited capabilities, which cast doubt on their ability to fulfil the tasks awaiting them. This gap became a strategic crisis during the War and in the years to follow, requiring the high command to deal with its consequences.

1 THE ISSUE OF SOCIAL SOLIDARITY AND THE CHANGES IN THE IDF'S SOCIAL COMPOSITION

On the eve of the War of Independence, despite being small and lacking military equipment and military doctrine, the Jewish forces enjoyed several advantages in relation to the local Arab forces. One was the existence of command and control mechanisms and units in the Hagana and the Palmach subordinated to those command centres. These served as an infrastructure for IDF units and command with the establishment of the state. Another advantage was the strong social solidarity that characterized the Hagana and the other organization personnel. They were strongly committed to the goals of the Zionist movement and its values, and to the idea that these justified the use of force (Shapira 1992); this led to them being considered a great pioneering fighting force. Being ethnically homogeneous, mostly native Israelis and Hebrew speakers, added to their ability to operate together. To all those advantages must be added another main advantage, which reinforced their social solidarity; it was the “*yeshuv*”, the strong feeling of being with their backs to the wall due to the holocaust horrors, and their strong belief concerning Arab intentions to destroy the Jewish community. Those advantages stood by the Israeli forces in the first part of the War, leading to a defeat of the enemy on all fronts and a total collapse of the local Arab community.

³ *Other armies like the Jordanian army continued to lean on British personnel, especially in command positions (Yitzhak 2006).*

⁴ *Regarding the Israeli efforts to develop military technology during the War of Independence and in the years to follow, see Neemani 2006, Barel 2009.*

During the War of Independence and in the years to follow there was a dramatic change in the social composition of the IDF, resulting in a general decrease in the military quality of the new recruits (Drori 2000, Turgan 2008, Oren 2002). In May 1948 there was an invasion of Arab forces from the neighbouring states; these armies were equipped with advanced weapons, including an air force and armoured corps, and this forced the newborn army and state to a different, much greater position in terms of buying or manufacturing military equipment and training personnel to operate and maintain the systems. In addition, it was necessary to increase the size of the fighting force on a dramatic scale, while creating new battalions, brigades and support forces including logistics and medical units (Gelber 1986, Naor 2003, Morris 2008).

The rapid growth in recruits during the war was also meant to fill the ranks due to the large number of casualties. This urgent need to enlarge the IDF created a gap between what was necessary and what was available. In contrast to the Hagana and other organization personnel, the new recruits were mostly new immigrants or veteran Israelis who had not taken part in the same social melting pot as the underground organization personnel. More than twenty thousand new immigrants, called the *gahal* (Markovitzki 1995, 1996), joined the army during the war. This name was given to all the new immigrants who enlisted in the IDF during the War and in the years to follow. *Gahal* is an acronym made up of the Hebrew initials for 'recruits from abroad'. This group included soldiers coming from many cultures and countries, and the use of the acronym was pejorative. Towards the end of the War, new immigrants made up one fifth of the army personnel. In contrast to the native-born Israelis, these new immigrants did not receive sufficient military or ideological training. This lack of preparation caused major problems in most army units. These problems kept increasing as nationwide recruitment was implemented. A concrete manifestation of the poor quality and lack of motivation of the new recruits can be found in the high percentages of draft evaders, which stood at 20% of the recruited force (Gelber 1986).

As the immigrant part of the army increased dramatically, the issue of its poor quality began to occupy the minds of the high command, which started to gather information about the characteristics of the new manpower. Soon these researchers painted a picture that confirmed their concern about the drastic change in the composition and characteristics of the army's manpower. One study, conducted in December 1948, showed that due to changes in ethnicity, only 21.4% of the army were native Israelis; 27% were from Poland, 11% from Romania, 8% from Germany and 5% from a variety of nations.⁵ This heterogeneity was also reflected in the period that the soldiers had lived in Israel before they enlisted in the army. A study showed that 21% of the fighting force had been in Israel for less than a year, 11% for less than three years, and 16% for more than three years but less than ten years.⁶

⁵ See the categorization and placement section in the manpower branch report on army personnel from 13 February 1949. *The Israel defence forces and defence establishment archives (IDFA) file 14-6722-1949 [Hebrew]*.

⁶ *Ibid.*

These changes led to serious problems connected to the poor quality of the new recruits, and their ability to function as soldiers and to understand and obey orders. The language problems and cultural differences made it very difficult for the commanders to manage the units, and this resulted in a very poor operational level. As the War continued these problems did not get the proper attention due to the need to win the War.

In terms of the quality of personnel in the army, the situation got worse in the years after the War. Mass demobilization of high quality personnel, which started during the War, continued and even escalated after the War (Luttwak and Horowitz 1984). The enforcement of the Defence Service Law (Hadar 1979) required the army to recruit all personnel who met the enlistment criteria (Hadar 1979; Gelber 1986). Simultaneously the army was to adopt organizational changes aimed at reducing the army to a peace standard of 30,000 members (Greenberg 1991, Oren 2002). In reality, the military managed to reduce its personnel to approximately 35,000 soldiers (Drori 2006, Gelber 1986, Greenberg 1991).

At a meeting of the IDF general staff that was dedicated to the dramatic changes in personnel during and especially after the War of Independence, the Chief of Staff, Yigael Yadin⁷, estimated that in the year 1950, 20,000 new recruits would be enlisted and 30,000 would be discharged. Half of the new recruits would be new immigrants (*gahal*). General Yossef Avidar, the commander of the Northern Command⁸, estimated that in a large portion of the army's units, the percentage of new immigrants would rise to 80% of the unit's manpower.⁹ Yadin argued that in the light of those statistics, if the IDF failed to act in a broad, decisive way, the results could be catastrophic. He added that a failure to address the educational and cultural problems could result in a total defeat on the battlefield:

“For the first part of the War, which is the critical part of our war plan, we are building our defences to rely on the regular units. In the next war, we could be facing such a disaster that any analogy to what happened two years ago would be fundamentally misguided. In terms of numbers, the situation might be similar, but in terms of fighting spirit the situation could be totally different.”¹⁰

The Prime Minister and the Minister of Defence, David Ben Gurion, reinforced Yadin's words by saying in another general staff meeting:

⁷ He was born in Jerusalem in 1917, joined the Hagana at the age of 15 and served in a number of command positions including Head of Operational Division. Appointed to the Chief of Staff position in November 1949, and served as Chief of Staff until December 1952. After leaving the army, he turned to archaeology and politics, serving as a member of Knesset and as acting Prime Minister of the ninth Knesset. He died in 1984.

⁸ He was born in Ukraine in 1906, immigrated to Palestine in 1925. Served in the Hagana in a number of command positions, including the commander of the old city of Jerusalem. After the establishment of Israel, served as General in a number of command positions, including the commander of the northern and central front. After leaving the army, he was appointed Ambassador to Russia. He died in 1995.

⁹ See the protocol of the general staff meeting of 12 February 1950. IDFA, file: 14-847-1962 [Hebrew].

¹⁰ *Ibid.*

“Our army does not recruit manpower similar to the manpower in the British army. We receive manpower similar to the Iraqi army manpower and this is terrible.”¹¹

In terms of education, the level of the soldiers was poor and did not improve in the early fifties.¹² (Drori 2006; Turgan 2008) The high command faced a serious problem because, on the one hand, the soldiers’ level of education was declining as the waves of new immigrants continued to flood the country and the percentage of new immigrants serving in IDF units increased. On the other hand, the need for educated personnel kept rising due to technological improvements that began in the form of purchasing new and advanced weapons and military systems. For example, at the end of 1951, the percentage of soldiers with only elementary education¹³ or less was 52.7%. By the beginning of 1953, this percentage had risen to 80%, staying the same in the years to follow until 1956. At one end of the educational ladder there were soldiers with no formal education, not even knowing how to read and write; they were 8% of the IDF force at the beginning of 1953 and 5% in 1956. Only 1% of the soldiers had had an academic education.

One educational area that did improve was learning and knowing Hebrew by the new recruits and soldiers. This improvement can be related to two parallel factors. One was the efforts that were made by the army to teach the immigrant soldiers the Hebrew language and Zionist values, an effort that caught the attention of foreign armies which had similar problems.¹⁴ The second factor was the time the new immigrants had spent in Israel prior to their enlistment¹⁵ (Turgan 2008). Although some progress was made in the educational area, this part showed a massive change for the worse, affecting the quality and the cohesion of the army personnel, as it developed over a very short time.

2 THE SHORTAGE OF SUITABLE MANPOWER FOR COMMAND

One of the main manifestations of the manpower crisis that started during the War and intensified in the years after the War was the severe shortage of suitable manpower for command at different levels, including officers and low-level commanders like squad commanders and sergeants (Gelber 1986). Sagi Turgan (2008) researched this characteristic. The shortage appeared in most army units, including both regular and reserve units. A demonstration of the seriousness of the situation can be found in the words of General Zvi Tzur in a letter he sent to the deputy of the Chief of Staff,

¹¹ See David Ben Gurion’s words at the general staff meeting at the 23 of April 1953. IDFA, file: 25-847-1962 [translated by the author].

¹² See compilation of data regarding the IDF education in (Drori 2006, pp.412-429. See also Turgan 2008).

¹³ Up to 8 years at school.

¹⁴ See a report from the head of education at the education and youth corps about techniques of teaching soldiers to read and write. IDFA, file: 15-798-1960 [Hebrew].

¹⁵ See the IDF buildup report 1950-1955. Made by the manpower branch, p.17. IDFA, file 1165-1034-1965. [Hebrew] See also Turgan, *Training Combat Leadership in the IDF 1949-1956*, Doctoral dissertation, Hebrew University of Jerusalem, (Jerusalem, 2008): 215 [Hebrew].

saying that in the years 1951-1952 there was a shortage in the regular army of 2030 officers and 2189 non-commissioned officers.¹⁶ The report shows that there had been some progress, but the shortage was still severe. For example, in October 1953, the army lacked 1157 officers; in November 1953, the army lacked 1218 officers.¹⁷

In view of the acute shortage, a discussion arose in the general staff about the proper way to manage the new recruits and the existing command personnel. In order to reduce the damage to the combat units, the army gave priority to those units, mostly sending them the personnel that were considered more capable (Turgan 2008). These were the native Israelis, Hebrew speakers and educated personnel. This priority was given due to the low intensity war situation that continued after the War, especially at the borders. In doing so, the general staff increased the shortage of educated soldiers in the non-combat units. In a review given to the general staff, it was presented that, as of November 1951, there was a severe shortage of logistics officers in all divisions and commands.¹⁸

In the reserve units, the shortage was so severe that the IDF were unable to reduce it for several years in a row. According to the IDF build-up report 1950-1955, signed by General Zvi Tzur of the manpower branch in 1950, during the work year of 1951-1952 the army expected a shortage of 2500 reserve officers and 12,000 NCOs.¹⁹ Referring to the general shortage in command personnel, General Zvi Tzur said:

“The number of officers in the army today does not fit the needs of the army list that was based on 12 reinforced brigades. The shortage in that area is so severe that even if we take into account that priority will be given to the training of commanders, we will still be very far from meeting the required number of commanders.”²⁰

The shortage in personnel suitable for command continued to be a problem for the IDF throughout the 1950s, as part of the developing manpower crisis.

3 THE SHORTAGE IN PROFESSIONAL MANPOWER

Another main characteristic of the manpower crisis that has received little academic attention was the shortage or absence of professional military manpower able to deal with the technological challenges that the IDF faced. The professional manpower shortage affected all army units in a large variety of functions during the War and in the years to follow. Purchasing new and advanced weapons intensified the need

¹⁶ NCOs. See personnel report on officers in the army, sent by the Head of the organization section to the Head of the staff section, at the manpower branch dated 18 November 1953. IDFA, file: 312-55-1965 [Hebrew].

¹⁷ *Ibid.*

¹⁸ See the protocol of the general staff meeting on October 28, 1951. p.5. IDFA, file:178-1559-1952 [Hebrew].

¹⁹ See the IDF buildup report 1950-1955. Made by the manpower branch. IDFA, file: 1165-1034-1965 [Hebrew].

²⁰ See a report by the Head of the planning staff in the general staff, General Zvi Tzur. The report was sent to the deputy of the Chief of Staff on December 29, 1950. IDFA, file: 4-346-1961 [translated by the author].

for professionals. During those years, the human resource pool from which the IDF could recruit or train military professionals was very limited, and far from what was needed. This need was felt during the War of Independence and especially afterwards, as severe shortages were faced in logistics, medical, electronics, ordnance and other functions. At the beginning of the War, professional personnel came from two main sources; one was the recruitment of British army veterans (Amitzur 2003) and the second was the ordnance section of the Hagana organization, which was very small.²¹

During 1950-1951, a special committee headed by the Chief of Ordnance was founded in order to inspect all the ordnance workshops and bases. The committee's conclusions were presented to the army general staff; with regard to the shortage in professional military personnel, the committee concluded:

“The situation regarding the lack of professional military is most alarming. The military command has noted a constant decrease in the numbers of professionals due to them leaving the service. The main cause for their leaving is the army’s lack of ability to compete with the civilian market on wage conditions.”²²

Another factor causing the shortage was the lack of training and learning facilities designated to army needs. Even in cases where the army succeeded in training soldiers in military courses a problem occurred, as the length of military service of two years was not enough, especially in cases of long courses that left little time for the soldiers to practise their military profession. An expression of that problem can be found in the words of deputy Chief of Staff General Mordechai Maklhef, at the general staff meeting in June 1951:

“In the current situation we have 2000 trainees in the military vocational schools in the army. The length of their training is such that it is not possible for the army to take advantage of the knowledge acquired. For example, a radio technician course lasts between 11 and 16 months. A soldier that finishes the course has no more than 10 months to serve in his new profession.”²³

Another example of the seriousness of the situation can be found in the words of General Zvi Tzur, the Head of the Planning Branch, about the possibilities the IDF had in its efforts to deal with the professional military personnel during 1952:

²¹ *Ibid.*, 28-30.

²² See the protocol of the general staff meeting of June 2, 1951. p.2. IDFA, file: 100-1559-1952 [translated by the author].

²³ See General Mordechai Maklief at the general staff meeting on November 12, 1950. p.2. IDFA. File 37-61-1952. [translated by the author].

“It is obvious the needs of the army are great – so great that there are not enough professionals in the country that can fulfil the military needs in addition to the civilian needs in 1952.”²⁴

This shortage continued to burden the IDF in the years to follow. For example, in May 1956, the Chief of the Manpower Branch, Colonel Gideon Shoken, reported on the severe shortage of manpower in several army positions, including the lack of 345 logistic personnel such as cooks and drivers, 271 air force professionals, and 355 ordnance soldiers and professionals.²⁵ According to Colonel Shoken, the numbers did not reflect the true nature of the crisis; to understand the whole picture it was also important to address the poor quality of the existing manpower. He said:

“Looking at these diagrams gives only a quantitative point of view of every profession. In some of these professions, there is also a severe quality problem. For example, in comparison to the 370 standard for quartermasters we have only 300 in reality. Out of those 300, only 100 are regular soldiers, mostly of a very poor quality.”²⁶

In March 1952, the Chief of Staff, Yigael Yadin, wrote to David Ben Gurion, Prime Minister and Minister of Defence, about the shortage in professional military manpower. In his letter, Yadin said regarding this issue that the situation was difficult in all army units and could result in severe damage. According to Yadin, the situation was not improving but getting worse over the years. Yadin said:

“I think that it is my duty to once again raise the alarm about the severe situation we have regarding the rapidly and steadily increasing quantitative and qualitative shortage of professional manpower. The alarming signals can be seen not only in a decrease in the operational level, but also in a general decrease in the quality of all general activities in the army. The lack of sergeants, clerks, receptionists, air force administrative manpower etc. can already be seen in a reduction and difficulty in problem-solving, causing great concern. Reports and letters I received and my personal impression all show that the situation is most alarming and could develop into an irreparable situation.”²⁷

The manpower that the army needed could be divided into two groups by the level of expertise and education required. The first group was professional, with high levels of expertise including positions that required an academic education, such as laboratory workers and physicians, electronic and mechanical engineers, lawyers

²⁴ See a letter from the deputy Chief of Staff from Zvi Tzur the Head of the planning team for the year of 1951-1952. Dated December 29, 1950. IDFA. File 4-346-1961 [translated by the author].

²⁵ Colonel Shoken received the rank of General in 1959.

²⁶ See a report from Colonel Gideon Shoken about personnel problems to the deputy Chief of Staff from May 13, 1956. IDFA. File 58-776-1958 [translated by the author].

²⁷ See a letter from the Chief of Staff, Yigael Yadin, to the Prime Minister and Minister of Defence, David Ben Gurion, from March 17, 1952. IDFA. File 20-1559-1952 [translated by the author].

and financiers.²⁸ The other group included professions that required a low level of expertise or education, including cooks, drivers, radio technicians, mechanics and others.²⁹ The shortage in professional manpower, as well as the shortage in suitable personnel for command, demonstrates the two major components of the manpower crisis, creating continuing difficulty at the core of the army.

The next sections will show the daily manifestations and the operational manifestations that defined this extremely difficult crisis as a whole.

4 DISCIPLINE PROBLEMS

Another significant characteristic of the manpower crisis was the problem of discipline. The high command wanted to implement order based on the kind of discipline that was common in other modern armies, mainly the British army (Drori 2006; Ostfeld 1994). The field of military discipline was considered one of the most important components in the transfer from being an underground organization to a regular army with a clear and binding set of rules (Ostfeld 1994). In order to succeed in that transition, the high command decided on a set of actions designed to implement the new rules and to reduce the discipline problems that could occur during the transition. As a main action, an emergency regimen was implemented with regard to discipline issues.³⁰ As part of the emergency regimen, enforcement was tightened, punishment of disciplinary violations was increased, commander's conferences were held, and the military police were ordered to tighten their enforcement on driving violations, military appearance and capture of deserters. At the same time, an effort to shape and adjust the rules was made.³¹ Despite the army's efforts, discipline remained poor and discipline problems were very common.

An expression of the importance of discipline in the eyes of the high command can be found in the words of the Chief of the Manpower Branch, General Shimon Maza³²:

“The enormous tasks placed upon the IDF and the nature of the new recruits required stricter enforcement of discipline in all fields. This chain of compliance, starting with

²⁸ See internal document from the organization wing at the manpower branch at the general staff. In the document, there are further details on other shortages of professional manpower. The document is dated June 20, 1954. IDFA, file 312-55-1965 [Hebrew].

²⁹ *Ibid.*

³⁰ See the IDF report by the Chief of Staff, Yigael Yadin, from 9.11.1949–30.3.1950. The report was presented to the general staff on May 22, 1950. IDFA, file: 36-68-1955 [Hebrew].

³¹ See a report on the actions of the manpower branch to the year 1950. The report is attached to a widely circulated letter from Major Daphna at the manpower branch. IDFA, file: 357-831-1953 [Hebrew].

³² He was born in 1907 in Russia. Grew up in Germany and immigrated to Israel in 1931. During World War II served in the transportation corp. and as the transportation officer of the Jewish Brigade. During the War of Independence served as the IDF transportation corp. commander. In October 1949 assigned to the Head of the manpower branch at the general staff. He died in 2000.

the general staff and ending with the last private, is a fundamental condition for the existence of the army and for its ability to operate at short notice.³³

The Head of the Manpower Branch based his statement on data showing poor discipline that had accumulated during and after the war. For example, in a report presented by the Head of the Strategic Planning Branch in the general staff branch (GHQ), a sharp increase of 34% in the number of soldiers who were sentenced due to disciplinary offenses between 1949-1951 was documented. In addition, there was a sharp increase of 27% in the number of soldiers sentenced for property crimes, including theft and negligence.³⁴

The definition of a discipline problem was divided into several fields. For example, the most common disciplinary offences in 1952 were military uniform infractions. In that year, only 22,912 indictments were filed, representing 20% of that year's indictments. Another 20% were driving offences, including reckless driving.³⁵ There were also serious military infractions that were dealt with by the military police and investigated by the IDF criminal investigation division.³⁶ For example, in 1952, six hundred cases resulted in indictments. The most common offence (33.5%) was theft of military equipment and money. Many severe cases can also be found, such as 22 suicide cases, 21 murder and manslaughter cases and five attempted murders, all during 1952.³⁷

5 THE PROBLEM OF AWOL³⁸ SOLDIERS AND DESERTERS

Another serious discipline problem was that of absentees and deserters. It is hard to determine the exact numbers during the War of Independence; however, proof of the existence of this as a major problem can be found in several fugitive capture operations held during the War, as well as other activities (Gelber 1986). From the annual reports of the military police for the years after the War, we learn that in this area, the situation was difficult. In every report until 1956, there were thousands of absentee and deserter cases dealt with by the military police. It can be presumed that those figures, as well as the other discipline problems, do not present the entire picture, due to the fact that numerous cases were dealt within the units themselves without reporting them to the military police.

³³ Appendix A. in the report on the manpower branch guidelines for the year 1951-1952. Inside the IDF, work order and guidelines for the year 1951-1952. IDFA, file: 36-68-1955 [translated by the author].

³⁴ See report by the Head of the commander of the strategic planning section at the general staff branch. From September 10, 1952, p.12. IDFA, file: 72-488-1955 [Hebrew].

³⁵ See the annual report of the military police of the year of 1952. p.17. IDFA, file: 107-63-1955 [Hebrew].

³⁶ Criminal investigation police.

³⁷ See the annual report of the military police of the year of 1952. p.17. IDFA, file: 107-63-1955 [Hebrew].

³⁸ *Absent Without Official Leave*: a term used in the United States Military to describe a soldier who has left his or her post without permission but is still not considered a deserter. In Israel the term deserter is used to refer to an absence of more than 21 days from a unit.

The 1952 annual military police report compares the 1952 data to previous years, showing the stability in the number of fugitives. In 1950 there were 7475 reports to the military police about desertion. A small decrease can be found in the following year, during which 7295 reports were made. In 1952, the number rose to 8177 deserters, including 2400 reserve soldiers.³⁹ During that year, the military police managed to capture 29% of the deserters.⁴⁰ The annual report also deals with the reasons that drove the soldiers to desert, stating that the main reason was the will of the soldiers to come to the aid of their families, who were suffering from poverty mainly at the new immigrant camps, the “*maabarot*.”⁴¹ The report states that an expression of the army’s failure to solve the problem could be found in the fact that the same soldiers deserted repeatedly. Repeated desertion shows, according to the report, a failure not only in meeting the soldiers’ and their families’ economic needs, but also a failure in implementing army discipline on the population of the new immigrants of the *maabarot*.⁴² Similar statistics for deserters can also be found in the years 1953-1955.⁴³ Another expression of the problem as being mainly, but not entirely, based on economic reasons can be found in the words of the Head of the military police, Colonel Baruch Yitzhak:

"From investigating this phenomenon, it appears that the main reason is the difficult economic situation the soldiers’ families are in, mostly new immigrants, living in the *maabarot*. The main reason for a soldier’s desertion is his desire to help his family by working outside the army, since army assistance is not enough. There are additional factors, such as the hard lifestyle, service in distant places or other family problems. In all of these cases, desertion comes after the army's refusal to comply with the soldier's request for help.⁴⁴"

6 HOLOCAUST SURVIVORS AND ARMY DISCIPLINE

A good example showing that military discipline was not appropriate for all the types of people serving in the army were the new immigrant recruits that had survived the holocaust. The recognition of the fact that this group was problematic started to circulate

³⁹ See the annual report of the military police for the year 1952:14. IDFA, file: 107-63-1955.

⁴⁰ *Ibid.*

⁴¹ The “*maabarot*” were temporary camps built by the Israeli government in order to provide accommodation for the new immigrants that flooded the new state in the early 1950s. The word comes from a Hebrew word that means transition. Most of the *maabarot* residents were housed in temporary tin dwellings. The residents of the *maabarot* suffered constantly from various problems including poverty and the lack of infrastructure. Slowly the tin dwellings were replaced with more suitable housing, transforming the *maabarot* into neighbourhoods and towns. The last camp was dismantled in 1963.

⁴² *Ibid.*

⁴³ See, for example, a military police summary report from September 1953, sent to the Chief of Staff by the Head of the military police, Colonel Baruch Itzhar, on October 19, 1953. IDFA, file: 60-636-1956 [Hebrew]. See also the military police summary report from October 1953, sent to the Chief of Staff by the Head of the military police, Colonel Baruch Itzhar, on November 10, 1953. IDFA, file: 60-636-1956 [Hebrew].

⁴⁴ See the annual report of the military police for the year 1952. p.14. IDFA, file: 107-63-1955 [translated by the author].

among the high command during the War. Reports came from different units regarding the hostile attitudes or strange behaviour of holocaust survivors in response to the implementation of military discipline or in stressful situations such as combat. The problem continued after the War, as more and more holocaust survivors joined the army.

In addition to the holocaust survivors' suffering due to their encounters with the lifestyle of the army, there was another difficulty. Due to the severe discipline problems, unit commanders had tightened the enforcement of rules. That tough approach was not only in order to enforce the rules, but part of a wider approach that prevailed in the army in the early 1950s. According to that approach, the attitude toward new recruits had to be harsh in order to eliminate all civilian characteristics and engrain the army way of life into the new soldiers. As if that was not enough hardship for these holocaust survivors, there was also the lack of understanding on the part of the native Israelis of the horrors that these people had survived.

An example of a case that emphasized this difficult situation can be found in Avraham Adan's book, *The Ink Flag* (Adan1984). In this book, he described an encounter he had as a company leader of the Negev Brigade during the War of Independence with a holocaust survivor. Adan met with his men individually for personal meetings; one soldier entered the room mumbling and grumbling in Yiddish, saying that he was not a soldier and did not understand what Adan wanted from him.⁴⁵ After two failed attempts to explain the behaviour expected from him and after the soldier began to curse, Adan rose from his chair and punched the soldier in the face. After the situation calmed down, the soldier was thrown into prison for a few days. From the inquiry Adan conducted with the other men in the unit, it turned out that the soldier's radical behaviour was a direct result of the horrific experiences he had had during the holocaust.⁴⁶

As the number of cases involving holocaust survivors rose, the problem caught the attention of the high command, who began to understand the importance of examining the correlation of military discipline with the backgrounds of all the groups that populated the army, including the holocaust survivors. In 1951 a symposium dedicated to the issues of discipline, education, leadership and morale was held for the IDF high command, in order to discuss the problems and come to a better understanding of the discipline issues, including those of holocaust survivor soldiers.

An explanation of the understanding that military discipline was not suitable for all groups can be found in the words of Yehuda Wallach,⁴⁷ the 10th Brigade commander:

⁴⁵ *Ibid*

⁴⁶ Avraham Adan (Bren), *The Ink Flag, The Ministry Of Deffence, Tel Aviv, 1984,pp.227.*

⁴⁷ He was born in 1921 in Germany. Served during the War of Independence as battalion commander of the Givati brigade. After the war stayed in the army, serving as brigade and division commander. After retiring from the army turned to an academic career as a military history researcher at Tel Aviv University. He died in 2008.

“There are other phenomena that we need to take under consideration. It turns out that the problem is not with the Mizrahi group, but with the European group of immigrants, former concentration camp prisoners. Our approach to punishment as part of military discipline does not suit them. Those people have the mentality of “*Iber Laaben*,”⁴⁸ because they survived and came here. Once they encounter a regimen of stress, pressure and punishments, naturally it evokes in them a terrible comparison between their [IDF] commanders and the Nazi camp regime. Both regimes are considered by them to be regimes of compulsion.⁴⁹”

Other commanders made similar claims. The main claim or fear was that army discipline, which was based on western army methods and values, was not appropriate for many of the groups serving in the Israeli army, which was composed of people from a variety of nations and cultures, including Arab nations and holocaust survivors. A good summary of the essence of the problem can be found in the words of Colonel Avraham Yaffe, the 8th Brigade commander:

“It is not a simple problem. To a person who is dealing with an Australian mentality there is no problem. In our army, things are very different and one must ask if the discipline we are implementing is suitable for these young people that just yesterday came from Yemen or North Africa. Or for the people coming from Eastern Europe, or for the native Israelis? Can we put all of these into the same cauldron and say that there is the same cure for everyone in our way to achieve our goals? In reality, this is what we do. We do not distinguish between the components that we are adding to the stew, treating them in the same way.⁵⁰”

7 INTERETHNIC TENSIONS – THE ARAB NATIONS’ IMMIGRANTS AND THE ARMY

Another characteristic of the manpower crisis and an expression of the social problems that characterized the IDF during those years was the existence of ethnic tensions, tensions between veteran Israelis and new immigrants and other groups. That issue cannot be fully addressed here, and although it has received some attention (Hacohen 1994, Markovitzky 1996), it has not been sufficiently researched. The wave of immigrants that flooded Israel during its first years created a complex heterogeneous society with vast ethnic, cultural and socioeconomic differences. The social gaps and the gap between the new immigrants’ expectations and reality created feelings of deprivation and frustration that drove them even farther from the

⁴⁸ This Yiddish term refers in general to the survival efforts made by the individual or by the whole society during the holocaust and in the light of the terrible circumstances. For more information regarding this, see the Yad Vashem web site: http://www1.yadvashem.org/yv/he/holocaust/resource_center/item.asp?gate=2-49

⁴⁹ See the words of Yehuda Wallach, the 10th Brigade commander in the protocol of the Regime, Education, Leadership and Morale Symposium. Held on June 22, 1951. p.6. IDFA. File 100-1559-1952 [translated by the author].

⁵⁰ See the words of Avraham Yaffe, the 8th Brigade commander in the protocol of the Regime, Education, Leadership and Morale Symposium. Held on June 22, 1951:1-2. IDFA. File 100-1559-1952 [translated by the author].

veteran Israelis (Hacohen 1994). In the IDF during the War and afterwards as part of implementing the security service law, soldiers from all ethnic groups were assigned to the same units, transforming them into a cultural cauldron in which diversity and differences prevailed.

The commanders and the high command failed to understand the differences between the various immigrant groups, not only between eastern and western immigrants, but also between groups of immigrants that might be considered to belong to the same group, for example, holocaust survivors in the blurring of the 'Ashkenazy' group, and the differences between immigrants from Iraq and Morocco in the Mizrahi group. A major factor that contributed to the blurring of the issues during those years and in future research was the inclusion of all immigrants under the name *Gahal*, a name that was usually connected to negative characteristics.

Ethnic tensions were common in most army units. Prejudices and stereotypes in which new immigrants were presented as primitive and wild were very common in the army units and in Israeli society in general (Lissak 1999, Tzur 1997). Immigrants from Arab nations were commonly tagged as those who were not mentally capable of coping with the challenges of modern society, as those who were lacking readiness for self-sacrifice and mutual aid (Tzur 1997). That tagging did not only apply to those coming from the Arab nations; European immigrants were considered to be selfish individuals, lacking the will to come to the aid of others and only interested in their own survival and welfare, as shown before in the matter of the holocaust survivors. In general, new immigrant soldiers were considered low quality manpower, not capable of fulfilling their assigned tasks or even meeting basic army requirements.

As the percentage of new immigrants rose in the years after the War, the problem intensified and started to occupy the attention of the high command. A manifestation of the fact that this was a problem and a major issue deserving attention can be found in the protocol of the manpower branch staff meeting held on June 28, 1952, in a review given to the Head of the Manpower Branch by a staff officer:

“...for the army this is only part of the manpower problem. All the doctrines on which the IDF is based originate in western cultures and societies. At the same time the army is filled with people coming from totally different cultures and societies, strangers to those values.⁵¹”

On the complex relationships between the new immigrant soldiers, the staff officer added that it was very important for the army to learn the differences between the groups and soldiers, in order to understand the ways that discipline could be implemented. His words express the army's recognition of the need to address the

⁵¹ See the protocol of the manpower branch staff meeting, from June. 28, 1952. p.3. IDFA, file: 443-702-1960 [translated by the author].

different immigrant groups in a particular manner, instead of including them all under the pejorative name *Gahal*:

“We need to understand the relationships between one ethnic group and another. Research has found that a Yemenite soldier is willing to sleep and live with a Bulgarian soldier. The Bulgarian does not rule out the Yemenite soldier completely. At the same time we have learned that we cannot put Yemenite and Iraqi soldiers together.⁵²”

In order to get a better understanding of the issue and the claims about the discrimination of new immigrants from Arab nations, General Haim Laskov, the Head of the Training Department at the general staff initiated some social research to be carried out from April to June, 1951. The research was conducted by Major Ezra Aharonson and was classified as top secret. The research included visiting and interviewing squad commanders, cooks, artillery soldiers and others.⁵³ The research came up with serious findings showing widespread discrimination against new immigrant soldiers from Arab nations. In his opinion, the cause of the problem did not lie only in the relationships between the soldiers themselves or between them and their commanders, but was rooted much deeper in selection processes and recruitment.⁵⁴

According to Major Aharonson’s report, the new immigrants from Arab nations found it hard to find their place in society due to hundreds of years of culture and development that separated them from the native Israelis and the European immigrants. Therefore, there was no point in trying to solve the problem with administrative tools. Major Aharonson also opposed the idea of creating elite groups among immigrant soldiers by training them for command positions. That kind of artificial training would only increase prejudice and hatred from the soldiers under their command. In his opinion the solution to the problem could be found in a much better and deeper understanding of the eastern cultural social background, which would allow the IDF to prepare a training doctrine suitable for the characteristics of that specific group.⁵⁵

The findings of Aharonson’s study, which were only partially implemented, provoked criticism in the Manpower Branch, which was expressed in a response letter in which the acting Head of the Manpower Branch claimed that Aharonson’s

⁵² *Ibid.*

⁵³ See the research report by Major Aharonson, made for General Laskov about the discrimination against immigrants from Arab nations in the IDF. The research took place from the 15 of April to 30 June 1951. IDFA, file: 357-831-1953.

⁵⁴ *Ibid.*

⁵⁵ See a report entitled “The problems of the Mizrahim in the IDF – Remarks to the report of Major Aharonson”. Attached to a research proposal on the subject of Arab nation immigrants in the IDF. Signed by Major Daphna in the name of the Head of the labour branch at the general staff. Dated 6 March, 1952. IDFA, file: 115-702-1960. See also a story in *Haaretz* by Shai Hazkani from August 12, 2015. “The Silenced History of the IDF’s ‘Mizrahi Problem.’” [Hebrew].

conclusions were incorrect with regard to the roots and causes of the discrimination and the ways to solve the problems.⁵⁶ According to the Manpower Branch, the problem of the absorption of the new immigrants in the IDF was much wider and more complex. It was part of the nationwide problem of the absorption of so many immigrants, mostly coming from nations with vastly different cultural orientations. These immigrants had problems adjusting to local western society, resulting in many social problems such as a high crime rate, a high percentage of school dropouts and in numerous characteristics perceived as unacceptable or negative according to prevailing norms.⁵⁷

8 THE MANPOWER CRISIS IN LIGHT OF THE OPERATIONAL ACTIVITIES

The characteristics of the manpower crisis were widely researched, not only regarding the operational level, but also regarding the influence of the human composition of the IDF on operational activities (Morris 1996; Drori 2006). In the field of operations, the changes in the social composition of the IDF resulted in a poor operational level and in failures which started during the War. In his book, Avraham Adan described a situation in which new immigrant soldiers under his direct command refused to get up and charge, despite repeated calls made by him and the other platoon commanders (Adan 1984).

After the war, during the first half of the 1950s, operational failures were very common as the IDF attempted to defend the country from Arab infiltrators who tried to cross the borders for various reasons such as trying to reap harvests in their old villages, stealing, murdering and spying (Morris 1996; Drori 2006). These failures caused a sense of despair among the settlers, driving many civilians to leave their homes, and creating fear among political leaders that there would be a total abandonment of settlements (Drori 2006). As the situation along the frontiers remained harsh, the IDF adopted an offensive approach against the infiltrators in the form of reprisal activities that were meant to reduce the motivation of infiltrators and their dispatchers.

Until 1953, more than 30 reprisals were carried out against various targets. A large part of those reprisals ended without achieving their goals. Some of the reprisals were characterized by a lack of fighting spirit among the soldiers and a lack of dedication. Others were characterized by a lack of desire to attack the enemy, resulting in sometimes refusing to charge and sometimes in uncontrolled withdrawal.⁵⁸ There were well-known and researched operational failures that revealed the influence of the manpower crisis on the operational level. Two well-known examples were the failed reprisals against the Jordanian villages Idna and Falame (Morris 1996; Drori 2006). Another operational failure occurred during the fighting around Tel-Motila,

⁵⁶ *Ibid.*

⁵⁷ *Ibid.*

⁵⁸ *Ibid.*

which took a toll of 41 dead and approximately 70 wounded. Research and evidence regarding the reprisals show that a main factor for the widespread operational failures was the low quality manpower. In many operations, commanders found themselves trying to motivate and move soldiers that refused to charge; in other cases commanders tried to prevent soldiers from fleeing the battlefield.

Conclusion In this article, I have pointed out the processes and problems that led to the emergence of a general and strategic crisis in the IDF during the War of Independence, and more intensely in the years to follow. In those years, the issue of manpower and its poor quality grew from an issue that needed to be handled as part of the operations and management of the manpower of the newborn army to a strategic issue that affected all army units and could jeopardize the army's ability to win the next war. At the heart of the crisis stood the drastic changes in the army's social composition, which turned the army overnight from a homogeneous army that enjoyed a high level of solidarity into a heterogeneous army in which problems and trends of disintegration occurred in most army units.

In a broader, worldwide vision, it seems that the problems that concerned the army during those years were not so different from the problems that concerned numerous post-colonial countries. Nevertheless, it seems that in three major factors the Israeli case can be seen as unique. Firstly, there was the tremendous degree of ethnic diversity, including groups of immigrants from dozens of cultures and nations. Secondly, there was the fact that the IDF had to organize itself while fighting a war of survival that continued at a low intensity of conflict in the years to follow. The last factor was the recognition of the high command and the political leadership that the solution to the problems had to rely on local resources only. Understanding the processes that led the IDF in its early years to an all-encompassing strategic manpower crisis can give us a better understanding of the ways new post-colonial armies are formed, and the problems involved in the process.

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Avtorji

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Dr. Johan Österberg je doktoriral iz psihologije. Zaposlen je kot raziskovalec in predavatelj v odseku za voditeljstvo oddelka za varnost, strategijo in voditeljstvo švedske obrambne univerze. Pri svojih raziskavah se ukvarja z manjšinami in častniki, pri pedagoškem delu pa z organizacijsko psihologijo, voditeljstvom in osebnostno psihologijo.

Johan Österberg, PhD, holds a PhD in Psychology. He works as a researcher and lecturer at Leadership Division of the Department of Security, Strategy and Leadership (Swedish Defence University). In his research, he focuses on recruitment and retention, especially of women, cultural minorities and officers, while his educational work focuses on organizational psychology, leadership and personality psychology.



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Liina-Mai Tooding je zaslužna profesorica, zaposlena na inštitutu za družbene vede univerze v Tartu v Estoniji. Kot raziskovalka se ukvarja s sociologijo življenjskega poteka in uporabo kvantitativnih raziskovalnih metod v družbenih vedah. V svoji karieri je predavala statistično analizo in napisala več priročnikov o statistični analizi za univerze. Dejavnna je tudi na področju razvijanja estonskega statističnega izrazoslovja.

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James Griffith

Dr. James Griffith je znanstveni sodelavec in predavatelj v nacionalnem centru za veteranske študije univerze Utah v Salt Lake Cityju. Je upokojen polkovnik, rezervist ameriške kopenske vojske, ki je 34 let deloval kot raziskovalni psiholog v zdravstvenem korpusu. Bil je tudi programski direktor za strokovne raziskovalne študije po srednji šoli v nacionalnem centru za pedagoško statistiko na ameriškem ministrstvu za šolstvo. Objavil je več kot 70 raziskovalnih člankov na temo prostovoljstva, zaposlovanja, zadrževanja in pripravljenosti vojakov, bojne motiviranosti in odziva na bojni stres, pred kratkim tudi samomora in s tem povezanih vedenjskih zdravstvenih težav pri ameriškem vojaškem osebju.

James Griffith, PhD, is a Research Fellow and Faculty at the National Center of Veterans Studies, University of Utah, Salt Lake City. He is a retired Colonel, US Army (reserve) who served 34 years as a Medical Service Corps research psychologist. He was Programme Director of post-secondary survey studies at the National Center for Educational Statistics, US Department of Education. He has published over 70 research articles on volunteerism; recruitment, retention, and readiness of soldiers; combat motivation and combat stress reactions; and most recently, suicide and related behavioral health issues in US military personnel.



Boštjan Močnik

Polkovnik mag. Boštjan Močnik je v SV zaposlen od leta 1998. Opravljal je štabne dolžnosti na vseh ravneh in poveljeval na vseh dolžnostih taktične ravni do poveljnika bataljonske bojne skupine. Bil je štirikrat v MOM, dvakrat je bil tudi poveljnik kontingenta. Je večkratni prejemnik priznanj in medalj tujih oboroženih sil ter prejemnik Natove medalje meritorious service za izjemne dosežke in osebni prispevek pri Natovih aktivnostih. Trenutno opravlja dolžnost načelnika Oddelka za strateško planiranje na GŠSV.

Colonel Boštjan Močnik, MSc, has been employed in the Slovenian Armed Forces since 1998. He has performed staff duties at all levels and acted as commander at all tactical level duties up to the commander of the battalion battle group. He has been deployed four times, twice as Contingent Commander. He has received several awards and medals of foreign armed forces, as well as a NATO Meritorious Service Medal for outstanding achievements and his personal contribution to NATO activities. Currently, he is Head of the Strategic Planning Section at the SAF General Staff.



Joanna E. Anderson

Dr. Joanna E. Anderson je doktorirala iz socialne psihologije na univerzi v Waterlooju. Kot obrambna strokovnjakinja je zaposlena na kanadskem ministrstvu za nacionalno obrambo, kjer je vodja raziskovalnega programa, povezanega z zadrževanjem rezervistov in sorodnimi temami. Je mednarodno priznana raziskovalka na področju rezervne sestave. Leta 2018 je bila vabljen predavateljica na Natovi izpopolnjevalni delavnici za raziskovanje. Kot raziskovalka se s temo zadrževanja kadra ukvarja tudi širše, na primer na področju mornariških in zdravstvenih dolžnosti.

Joanna E. Anderson, PhD, holds a PhD in Social Psychology from the University of Waterloo. She is a defence scientist in Canada's Department of National Defence, where she leads a programme of research related to Reserve Force retention and related issues. She is recognized internationally as a Reserve Force researcher, having been invited to present at a proposed NATO Advanced Research Workshop in 2018. Her research also encompasses retention issues more broadly; for example, in naval and health services occupations.



Irina Goldenberg

Irina Goldenberg je vodja enote za raziskovanje pridobivanja in zadrževanja kadra pri kanadski agenciji za obrambne raziskave in razvoj, kjer vodi raziskovalne programe, povezane s pridobivanjem in zadrževanjem kadra v kanadski vojski. Specializirana je za vojaško-civilno sodelovanje v okviru obrambnih organizacij. Je mednarodno priznana in uveljavljena raziskovalka ter dejavna v okviru številnih mednarodnih organizacij, vključno z raziskovalno skupino na področju vojske in družbe ERGOMAS, kjer deluje kot generalna sekretarka.

Irina Goldenberg is Section Head of Recruitment and Retention Research in Defence Research and Development Canada, managing the research program related to the recruitment and retention of Canadian Armed Forces personnel. In addition, she specializes in military-civilian personnel collaboration in defence organizations. She is an internationally known and respected researcher and plays an active role within many international organizations, including the European Research Group on Military and Society (ERGOMAS), where she serves as Secretary General.



Jan-Michael Charles

Mag. Jan-Michael Charles je svetovalec na kanadskem ministrstvu za nacionalno obrambo. Sodeluje pri več raziskovalnih projektih, povezanih s pridobivanjem in zadrževanjem kadra v kanadski vojski. Magistriral je iz pedagogike na univerzi v Ottawi, specializiral pa se je za področje uporabnih evalvacij na področju izobraževanja in družbenih ved. Izkušnje ima tudi s koordiniranjem projektov na področju zdravstva in javne varnosti.

Jan-Michael Charles, M.Ed. is a consultant in Canada's Department of National Defence, where he has been involved in several research projects relating to the recruitment and retention of Canadian Armed Forces personnel. He holds a M.Ed. from the University of Ottawa, specializes in applied educational and social science evaluations, and has experience in coordinating health and public safety projects.



Elad Neemani

Mag. Elad Neemani je doktorski študent na univerzi v Tel Avivu, po izobrazbi je pedagog. V svoji magistrski nalogi je preučeval odnose med akademsko sfero in vojaškim sistemom med vojno za neodvisnost in v poznejših letih. Je rezervni častnik s činom majorja v odseku za raziskave enote za pogrešane v boju v izraelski vojski. Na akademskem področju ga zanimajo odnosi med vojaškim in izobraževalnim sistemom kot del civilno-vojaškega sodelovanja. Tema njegove naloge je Izraelska vojska in izobraževalni sistem v zgodnjem obdobju države: prizadevanja za šolanje vojaške elite v srednjih šolah.

Elad Neemani, MSc, is a PhD student at Tel- Aviv University and an educator by profession. In his master thesis, he focused on the relations between the academic field and the military system during the Independence War and in the following years. He is a Reserve officer at the rank of Major in the Research Branch of the Missing in Action unit of the IDF. Academically, he focuses on relations between military and educational systems as part of the civil – military cooperation. The topic of his thesis is “The IDF and the education system during the early days of the state: the struggle over training military elite in high schools”.

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Prispevki naj obsegajo 16 strani oziroma 30.000 znakov s presledki (avtorska pola), izjemoma najmanj 8 strani oziroma 15.000 znakov ali največ 24 strani oziroma 45.000 znakov.

Recenzije

Prispevki se recenzirajo. Recenzija je anonimna. Glede na oceno recenzentov uredniški odbor ali urednik prispevek sprejme, če je treba, zahteva popravke ali ga zavrne. Pripombe recenzentov avtor vnese v prispevek.

Zaradi anonimnega recenzentskega postopka je treba prvo stran in vsebino oblikovati tako, da identiteta avtorja ni prepoznavna.

Avtor ob naslovu prispevka napiše, v katero kategorijo po njegovem mnenju in glede na klasifikacijo v COBISS spada njegov prispevek. Klasifikacija je dostopna na spletni strani revije in pri odgovornem uredniku. Končno klasifikacijo določi uredniški odbor.

- Lektoriranje** Lektoriranje besedil zagotavlja OE, pristojna za založniško dejavnost. Lektorirana besedila se avtorizirajo.
- Prevajanje** Prevajanje besedil ali povzetkov zagotavlja OE, pristojna za prevajalsko dejavnost oziroma Šola za tuje jezike Centra vojaških šol.
- Navajanje avtorjev prispevka** Navajanje avtorjev je skrajno zgoraj, levo poravnano.
Primer:
Ime 1 Priimek 1,
Ime 2 Priimek 2
V opombi pod črto se za slovenske avtorje navede, iz katere ustanove prihajajo. Pri tujih avtorjih je treba navesti tudi ime države.
- Naslov prispevka** Navedbi avtorjev sledi naslov prispevka. Črke v naslovu so velike 16 pik, natisnjene krepko, besedilo naslova pa poravnano na sredini.
- Povzetek** Prispevku mora biti dodan povzetek, ki obsega največ 1200 znakov (20 vrstic). Povzetek naj na kratko opredeli temo prispevka, predvsem naj povzame rezultate in ugotovitve. Splošne ugotovitve in misli ne spadajo v povzetek, temveč v uvod.
- Povzetek v angleščini** Avtorji morajo oddati tudi prevod povzetka v angleščino. Tudi za prevod povzetka velja omejitev do 1200 znakov (20 vrstic).
- Ključne besede** Ključne besede (3-5, tudi v angleškem jeziku) naj bodo natisnjene krepko in z obojestransko poravnavo besedila.
- Besedilo** Avtorji naj oddajo svoje prispevke na papirju formata A4, s presledkom med vrsticami 1,5 in velikostjo črk 12 pik Arial. Na zgornjem in spodnjem robu naj bo do besedila približno 3 cm, levi rob naj bo širok 2 cm, desni pa 4 cm. Na vsaki strani je tako približno 30 vrstic s približno 62 znaki. Besedilo naj bo obojestransko poravnano, brez umikov na začetku odstavka.
- Kratka predstavitev avtorjev** Avtorji morajo pripraviti kratko predstavitev svojega strokovnega oziroma znanstvenega dela. Predstavitev naj ne presega 600 znakov (10 vrstic, 80 besed). Če je avtorjev več, se predstavi vsak posebej, čim bolj zgoščeno. Avtorji naj besedilo umestijo na konec prispevka po navedeni literaturi.

Strukturiranje besedila

Posamezna poglavja v besedilu naj bodo ločena s samostojnimi podnaslovi in ustrezno oštevilčena (členitev največ na 4 ravni).

Primer:

1 Uvod

2 Naslov poglavja (1. raven)

2.1 Podnaslov (2. raven)

2.1.1 Podnaslov (3. raven)

2.1.1.1 Podnaslov (4. raven)

Oblikovanje seznama literature

V seznamu literature je treba po abecednem redu navesti le avtorje, na katere se sklicujete v prispevku, celotna oznaka vira pa mora biti skladna s harvardskim načinom navajanja. Če je avtorjev več, navedemo vse, kot so navedeni na izvirnem delu.

Primeri:

a) knjiga:

Priimek, ime (lahko začetnica imena), letnica. *Naslov dela*. Kraj: Založba.

Na primer: Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press.

b) zbornik:

Samson, C., 1970. Problems of information studies in history. V S. Stone, ur. *Humanities information research*. Sheffield: CRUS, 1980, str./pp. 44–68. Pri posameznih člankih v zbornikih na koncu posameznega vira navedemo strani, na katerih je članek, na primer:

c) članek v reviji

Kolega, N., 2006. Slovenian coast sea flood risk. *Acta geographica Slovenica*. 46-2, str. 143–167.

Navajanje virov z interneta

Vse reference se začenjajo enako kot pri natisnjenih virih, le da običajnemu delu sledi še podatek o tem, kje na internetu je bil dokument dobljen in kdaj. Podatek o tem, kdaj je bil dokument dobljen, je pomemben zaradi pogostega spreminjanja www okolja.

Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press, str. 45–100. <http://www.mors.si/index.php?id=213>, 17. 10. 2008. Pri navajanju zanimivih internetnih naslovov v besedilu (ne gre za navajanje posebnega dokumenta) zadošča navedba naslova (<http://www.vpvs.uni-lj.si>). Posebna referenca na koncu besedila v tem primeru ni potrebna.

Sklicevanje na vire

Pri sklicevanju na vire med besedilom navedite le priimek prvega avtorja in letnico izdaje. *Primer:* ... (Smith, 1997) ...

Če dobesedno navajate del besedila, ga ustrezno označite z narekovaji, v oklepaju pa poleg avtorja in letnice navedite stran besedila, iz katerega ste navajali.

Primer: ... (Smith, 1997, str. 15) ...

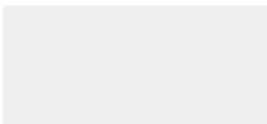
Pri povzemanju drugega avtorja napišemo besedilo brez narekovajev, v oklepaju pa napišemo, da gre za povzeto besedilo. *Primer:* (po Smith, 1997, str. 15). Če avtorja navajamo v besedilu, v oklepaju navedemo samo letnico izida in stran (1997, str. 15).

Slike, diagrami in tabele

Slike, diagrami in tabele v prispevku naj bodo v posebej pripravljenih datotekah, ki omogočajo lektorske popravke. V besedilu mora biti jasno označeno mesto, kamor je treba vnesti sliko. Skupna dolžina prispevka ne sme preseči dane omejitve.

Če avtor iz tehničnih razlogov grafičnih dodatkov ne more oddati v elektronski obliki, je izjemoma sprejemljivo, da slike priloži besedilu. Avtor mora v tem primeru na zadnjo stran slike napisati zaporedno številko in naslov, v besedilu pa pustiti dovolj prostora zanjo. Prav tako mora biti besedilo opremljeno z naslovom in številčenjem slike. Diagrami se štejejo kot slike. Vse slike in tabele se številčijo. Številčenje poteka enotno in ni povezano s številčenjem poglavij. Naslov slike je naveden pod sliko, naslov tabele pa nad tabelo. Navadno je v besedilu navedeno vsaj eno sklicevanje na sliko ali tabelo. Sklic na sliko ali tabelo je: ... (slika 5) ... (tabela 2) ...

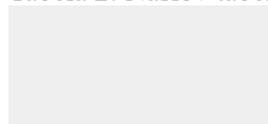
Primer slike:



Slika 5: Naslov slike

Primer tabele:

Tabela 2: Naslov tabele



Opombe pod črto

Številčenje opomb pod črto je neodvisno od strukture besedila in se v vsakem prispevku začne s številko 1. Posebej opozarjamo avtorje, da so opombe pod črto namenjene pojasnjevanju misli, zapisanih v besedilu, in ne navajanju literature.

Kratice

Kratice naj bodo dodane v oklepaju, ko se okrajšana beseda prvič uporabi, zato posebnih seznamov kratic ne dodajamo. Za kratico ali izraz v angleškem jeziku napišemo najprej slovensko ustreznico, v oklepaju pa angleški izvornik in morebitno angleško kratico.

Format zapisa prispevka

Uredniški odbor sprejema prispevke, napisane z urejevalnikom besedil MS Word, izjemoma tudi v besedilnem zapisu (text only).

Naslov avtorja	Prispevkom naj bosta dodana avtorjeva naslov in internetni naslov ali telefonska številka, na katerih bo dosegljiv uredniškemu odboru.
Kako poslati prispevek	Na naslov uredništva ali članov uredniškega odbora je treba poslati tiskano in elektronsko različico prispevka.
Potrjevanje sprejetja prispevka	Uredniški odbor avtorju pisno potrdi prejetje prispevka. Avtorjem, ki sporočijo tudi naslov svoje elektronske pošte, se potrditev pošlje po tej poti.
Korekture	Avtor opravi korekture svojega prispevka v treh dneh.
Naslov uredniškega odbora	Ministrstvo za obrambo Generalštab Slovenske vojske Sodobni vojaški izzivi Uredniški odbor Vojkova cesta 55 1000 Ljubljana Slovenija Elektronski naslov Odgovorna urednica: liliana.brozic@mors.si

Prispevkov, ki ne bodo urejeni skladno s tem navodilom, uredniški odbor ne bo sprejemal.

INSTRUCTIONS FOR THE AUTHORS OF PAPERS FOR THE CONTEMPORARY MILITARY CHALLENGES AND THE MILITARY EDUCATION JOURNAL

Content-related instructions

General

The Contemporary Military Challenges is an interdisciplinary scientific expert magazine, which publishes papers on current topics, researches, scientific and expert discussions, technical or social sciences analysis from the field of security, defence and the military..

The Military Education Journal is a military professional and informative publication intended for education and informing on achievements and experiences in the field of military education, training and improvement.

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Limitations regarding the length of the papers

The papers should consist of 16 typewritten double-spaced pages or 30,000 characters. At a minimum they should have 8 pages or 15,000 characters and at a maximum 24 pages or 45,000 characters.

- Reviews** All papers are reviewed. The review is anonymous. With regard to the reviewer's assessment, the Editorial Board or the editor accepts the paper, demands modifications, if necessary, or rejects it. Upon receiving the reviewers' remarks, the author inserts them into the paper.
Due to an anonymous review process, the first page must be designed in the way that the author's identity cannot be recognized.
Next to the title, the author should indicate the category the paper belongs to according to him and according to the classification in the COBISS¹. The classification is available on the magazine's internet page and at the responsible editor. The Editorial Board determines the final classification.
- Proofreading** The organizational unit responsible for publishing provides the proofreading of the papers. The proofread papers have to be approved.
- Translating** The translation of the papers or abstracts is provided by the organizational unit competent for translation or the School of Foreign Languages, Military Schools Centre.
- Indicating the authors of the paper** The authors' name should be written in the upper left corner, aligned left.
Example:
Name 1 Surname 1,
Name 2 Surname 2,
In the footnote, Slovenian authors should indicate the institution they come from. Foreign authors should also indicate the name of the state they come from.
- Title of the paper** The title of the paper is written below the listed authors. The font in the title is bold, size 16 points. The text of the title is centrally aligned.
- Abstract** The paper should have an abstract of a maximum 1,200 characters (20 lines). The abstract should include a short presentation of the topic, particularly the results and the findings. General findings and reflections do not belong in the abstract, but rather in the introduction.
- Abstract in English** The authors must also submit the translation of the abstract into English. The translation of the abstract is likewise limited to a maximum of 1,200 characters (20 lines).
- Key words** Key words (3-5 also in the English language) should be bold with a justified text alignment.
- Text** The authors should submit their papers on an A4 paper format, with 1.5 line spacing, fontArial size 12 points. At the upper and the bottom edge, there should be approx. 3 cm of space; the left margin should be 2 cm wide and the right margin 4 cm. Each page consists of approx. 30 lines with 62 characters. The text should have a justified alignment, without indents at the beginning of the paragraphs.

¹ Co-operative Online Bibliographic System and Services

A brief presentation of the authors

The authors should prepare a brief presentation of their expert or scientific work. The presentation should not exceed 600 characters (10 lines, 80 words). If there are several authors, each should be presented individually, as shortly and as comprehensively as possible. These texts should be placed at the end of the paper, after the cited literature.

Text structuring

Individual chapters should be separated with independent subtitles and adequately numbered.

Example:

- 1 Introduction
- 2 Title of the chapter (1st level)
- 2.1 Subtitle (2nd level)
- 2.1.1 Subtitle (3rd level)
- 2.1.1.1 Subtitle (4th level)

Referencing

In the bibliography, only the authors of references one refers to in the paper should be listed, in the alphabetical order. The entire reference has to be in compliance with the Harvard citing style.

Example:

Surname, name (can also be the initial of the name), year. *Title of the work*. Place. Publishing House.

Example:

Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press.

With certain papers published in journals, the author should indicate, at the end of each reference, a page on which the paper can be found.

Example:

Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press. pp. 45-100.

Referencing internet sources

All references start the same as the references for the printed sources, only that the usual part is followed by the information about the Internet page on which the document was found as well as the date on which it was found. The information about the time that the document was found on the Internet is important, because the WWW environment changes constantly.

Urlich, W., 1983. *Critical Heuristics of Social Planning*. Chicago: University of Chicago Press. p. 45-100. <http://www.mors.si/index.php?id=213>, 17 October 2008.

When referencing interesting WWW pages in the text (not citing an individual document) it is enough to state only the Internet address (<http://www.vpvs.uni-lj.si>). A separate reference at the end of the text is therefore not necessary.

Citing

When citing sources in the text, indicate only the surname of the author and the year of publication. *Example:* (Smith, 1997) ...

When making a direct reference to a text, the cited part should be adequately marked with quotation marks and followed by the exact page of the text which the citing is taken from.

Example: ...(Smith, 1997, p.15) ...

Figures, diagrams, tables

Figures, diagrams and tables in the paper should be prepared in separate files which allow for proofreading corrections. The place in the text where the picture should be inserted must be clearly indicated. The total length of the paper must not surpass the given limitation.

Should the author not be able to submit the graphical supplements in the electronic form due to technical reasons, it is exceptionally acceptable to enclose the figures to the text. In this case the author must write a sequence number and a title on the back of each picture and leave enough space in the text to include it. The text must likewise contain the title and the sequence number of the figure. Diagrams are considered figures.

All figures and tables are numbered. The numbering is not uniform and not linked with the numbering of the chapters. The title of the figure is stated beneath it and the title of the table is stated above it.

As a rule, the paper should include at least one reference to a figure or a table..

Reference to a figure or a table is: ... (Figure 5) (Table 2)

Example of a figure:

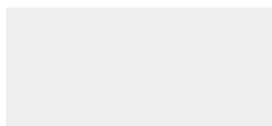
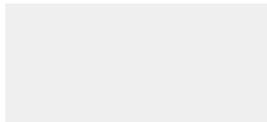


Figure 5: Title of the figure

Example of a table:

Table 2: Title of the table



Footnotes

The numbering of the footnotes is not related to the structure of the text and starts with number 1 in each paper. We want to stress that the aim of the footnotes is to explain the thoughts written in the text and not to reference literature.

Abbreviations

When used for the first time, the abbreviations in the text must be explained in parenthesis; therefore no additional list of abbreviations is needed. If the abbreviations or terms are written in English, the appropriate Slovenian term should be written along with the English original and possibly the English abbreviation in the parenthesis.

Format type of the paper

The Editorial Board accepts only the texts written with a MS Word text editor and only exceptionally those in the 'text only' format.

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