FRONTLINE AFRICA
ADVISORY

South Africa Political and Economic 2026 Mid-Year Review

June 2026

Executive Summary

- South Africa entered the second half of 2026 on a stable but fragile trajectory. The first six months largely confirmed the January stabilisation outlook: growth remained weak but positive, inflation was manageable despite external energy shocks, infrastructure reforms delivered incremental gains in energy and logistics, and the Government of National Unity (GNU) proved more durable than many expected.
- For business, investors and policy stakeholders, the key shift is a relocation rather than a collapse of governance risk. The GNU remains intact, but the Constitutional Court's Phala Phala ruling has introduced its first major institutional test, while risk is increasingly concentrated at provincial level, particularly in KwaZulu-Natal and Gauteng, where coalition margins are narrower and incentives more volatile.
- Political competition is becoming more issue-driven ahead of the November 2026 Local Government Elections (LGE). Migration has emerged as a prominent mobilisation theme, with immigration, border management and asylum policy used as proxies for wider concerns around unemployment, crime and service delivery. Efforts to consolidate a broader left-wing project remain constrained by fragmentation between the EFF, MKP, SACP and other formations.
- South Africa's foreign policy is becoming more commercially anchored. Engagements with Kenya, Botswana and Namibia, alongside deeper cooperation with the European Union (EU) and Spain, point to a pragmatic effort to diversify trade, investment and strategic partnerships amid global trade uncertainty. BRICS remains strategically important, but internal geopolitical divergences continue to limit policy coherence.
- The outlook is cautiously constructive but not self-sustaining. South Africa's macroeconomic and institutional base has improved relative to earlier expectations, but recovery remains constrained by high unemployment, weak manufacturing, municipal service delivery failures and external price volatility. Frontline Africa will continue tracking coalition stability, infrastructure execution and investment policy signals through the LGE cycle.

MID-YEAR REVIEW

Governance

GNU Stability Faces Its First Major Institutional Test

- The GNU has enjoyed the appearance of relative stability throughout the first half of 2026, but ongoing developments surrounding the Phala Phala impeachment process may present its most significant test since its formation. The origins of the matter lie in the Constitutional Court's 8 May judgment, which ruled that the rules allowing the National Assembly to set aside the findings of the Section 89 Independent Panel were unconstitutional. The ruling effectively reopened the possibility of impeachment proceedings against President Cyril Ramaphosa and required that the Independent Panel Report be referred to the impeachment process established under the National Assembly Rules.
- Subsequent developments have complicated the implementation of the judgement. The process, however, continues unless and until it is interdicted. President Cyril Ramaphosa has sought legal relief against the operationalisation of the impeachment process, while the African National Congress's (ANC) National Executive Committee (NEC) publicly endorsed his decision to pursue a review application. On 19 June, National Assembly Speaker Thoko Didiza indicated that she would not oppose the urgent application to interdict the proceedings, citing the need to ensure procedural impartiality and that the law is allowed to take its proper course. Her decision is also viewed in the context of her having established the relevant committee with relative speed. These actions can be interpreted by critics as attempts to delay the implementation of the Constitutional Court's ruling, while supporters may argue that they are necessary to clarify the legal standing of the Section 89 report and ensure procedural certainty.
- The issue has also highlighted the differences in how the GNU parties approach government and legislative oversight. The Democratic Alliance (DA) has publicly stated that it will support a process consistent with the Constitutional Court judgement and participate in the impeachment committee, while the Inkatha Freedom Party (IFP) has similarly affirmed its commitment to participating in the process. The ANC, by contrast, has supported the President's legal challenge to the implementation of the ruling. These positions reflect different approaches within the coalition to constitutional accountability and procedural recourse, rather than a direct contradiction, and create the possibility of differing approaches among coalition partners on matters of constitutional accountability.
- As it stands, the impeachment committee is expected to continue its preparatory work, including consideration of its terms of reference and the appointment of evidence leaders. The matter therefore extends beyond the future of President Ramaphosa alone. It centres on the procedural question of whether the process can proceed while a review application on the Section 89 panel report is pending, despite the Constitutional Court's judgement being broadly accepted by all parties. It thus tests the separation of powers framework in practice, as the executive and legislature pursue the continuation of parliamentary processes while the judiciary is seized with related review proceedings. More broadly, it represents a significant governance stress test for the GNU, placing coalition management, legislative bargaining and constitutional accountability under increased scrutiny.

Provincial Politics Emerges as South Africa's New Governance Risk Frontier

- While much attention has focused on the stability of the GNU at national level, governance risk increasingly appears to be shifting towards the provincial sphere. The provincial governments in KwaZulu-Natal (KZN) and Gauteng may prove more vulnerable to political fragmentation than their national counterpart, owing to narrower legislative margins and more fluid coalition arrangements.
- KZN provides the clearest example. The National Freedom Party (NFP) has, in practice, stepped back from its earlier coalition alignment in ways that have affected the stability of the governing arrangement. In the context of the vote of no confidence against Premier Thami Ntuli, the margin of support was narrow (39/41), underscoring the fragility of the coalition and the importance of each party's voting behaviour, including that of the NFP, which was aligned with the outcome supporting the Premier. The move coincided with renewed political pressure from the MKP, which bore responsibility for the motion of no confidence against Premier Ntuli. Although the IFP, ANC and DA remain committed to the coalition, the province's political balance remains sensitive to further shifts in party alignment and legislative support.

- A different but equally significant development occurred in Gauteng. Premier Panyaza Lesufi confirmed the entry of the EFF into the provincial executive on 1 April, resulting in the appointment of the party's Gauteng leader Nkululeko Dunga as Member of the Executive Council (MEC) for Finance. The development illustrates the increasingly pragmatic nature of coalition politics in South Africa, where provincial arrangements are diverging from national coalition configurations. Whereas the GNU is anchored by cooperation between the ANC and DA, Gauteng has moved towards greater cooperation between the ANC and EFF.
- Taken together, developments in KZN and Gauteng suggest that the principal governance risk facing South Africa may no longer reside primarily within the GNU itself, but rather within the country's evolving provincial coalitions. These governments operate with narrower political margins, are more susceptible to changes in coalition arithmetic, and face greater uncertainty regarding future partnership arrangements. As a result, provincial politics may become a key determinant of governance stability during the second half of 2026.

Politics

Electoral Competition Is Reshaping Political Behaviour

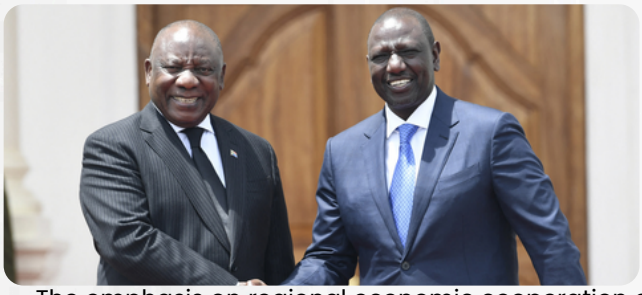
- Migration has increasingly become an electoral mobilisation tool in the lead-up to the November LGE, with political parties adapting their messaging in response to rising labour market pressures and service delivery strain. A key driver has been the prominence of the March and March movement in early to mid-2026, culminating in the June 30 nation-wide protests, which intensified public pressure for stricter immigration controls and framed undocumented migration as a governance and economic stressor.
- In this context, parties have converged into three broad behavioural blocs. The EFF has maintained a rights-based stance, consistently condemning xenophobic violence and framing migration tensions as a product of structural inequality rather than identity conflict.
- A second bloc, made up of the ANC, DA, Build One South Africa (BOSA), and Rise Mzansi, has increasingly adopted a policy of strict border control and regulatory enforcement. This approach may be interpreted as a direct result of institutional capacity constraints and the political need to demonstrate control over undocumented migration. This shift has been reinforced by the state's evolving policy trajectory through the Revised White Paper on Citizenship, Immigration and Refugee Protection, which prioritises asylum system integrity and enforcement strengthening.
- A third, more explicitly restrictionist bloc comprises ActionSA, the IFP and the MKP, though with varying levels of policy consistency and institutional depth. ActionSA has adopted the most structured enforcement platform, formally submitting proposals during the White Paper process calling for an end to systemic abuse of the immigration regime and supporting tighter asylum controls, later aligning with Cabinet-approved reforms such as the First Safe Country Principle. The IFP and MKP have increasingly reflected stricter migration control sentiment in campaign messaging, although the MKP's articulation remains more rhetorical than institutionalised.
- These dynamics indicate that anti-immigration sentiment is not only shaping policy convergence but is also being actively instrumentalised for voter mobilisation, with parties increasingly using migration as a proxy issue for unemployment, crime, and service delivery failures ahead of the 2026 LGE cycle.

The Fragmenting Left

- The Conference of the Left, convened by the South African Communist Party (SACP) from 29 to 31 May, represented an attempt to coordinate a broad left-wing platform around a shared programme focused on economic transformation, land reform, public services and social protection. While the gathering brought together the SACP, Congress of South African Trade Unions (COSATU), the EFF and various civic formations, it also highlighted the difficulties of forging a coherent political bloc among organisations with distinct constituencies, electoral interests and strategic priorities.
- Yet the dominant trend remains fragmentation rather than consolidation. The EFF and the MKP continue to compete for many of the same constituencies while simultaneously seeking to expand their influence at the ANC's expense. Leadership developments have reinforced this pattern. The EFF has continued to adjust to the loss of several prominent figures in recent years, including former national spokesperson Mbuyiseni Ndlozi and former deputy president Floyd Shivambu. Within MKP, the dismissal of Duduzile Zuma-Sambudla and former Spokesperson Nhlamulo Ndhlela in mid-June further highlighted ongoing internal tensions and organisational volatility. Rather than coalescing into a unified alternative, the left continues to fragment into competing centres of political influence.
- The SACP's pursuit of a more autonomous political path and COSATU's continued position within the tripartite alliance further underscore the absence of a coherent left-wing realignment. While initiatives such as the proposed Council of the Left may facilitate cooperation on selected policy issues, electoral competition, leadership rivalries and organisational self-interest continue to constrain deeper political convergence ahead of the 2026 LGE.

Foreign Policy

Economically Anchored Regional Diplomacy



- South Africa's continental diplomacy in May-June 2026 increasingly reflected an effort to deepen regional economic partnerships amid growing uncertainty in the global trading environment. The South Africa-Kenya Business Forum on 4 June 2026, co-chaired by President Cyril Ramaphosa and President William Ruto during Ruto's inaugural state visit, emerged as the clearest expression of this shift, elevating investment diplomacy and market expansion as central instruments of bilateral engagement.
- The emphasis on regional economic cooperation comes against the backdrop of continued volatility in United States (US) trade policy. Since 2025, successive tariff announcements, suspensions, legal challenges and revisions have created uncertainty for exporters globally, including South Africa. In this context, Pretoria's upward revision of its investment mobilisation target to R3 trillion, alongside earlier commitments of approximately R890 billion, signals an increasingly proactive effort to diversify economic partnerships and reduce exposure to external market disruptions. The Kenya forum also highlighted practical trade facilitation issues, including concerns around the International Trade Administration Commission's (ITAC) sugar reference pricing mechanism, while advancing cooperation through a Memorandum of Understanding (MoU) on mutual recognition of qualifications and commitments to reduce retaliatory trade barriers.
- These developments suggest that South Africa is increasingly leveraging bilateral forums not only to expand trade volumes but also to broaden its network of economic partners in response to a less predictable global trading environment. Alongside Kenya, the South Africa-Botswana Binational Commission (BNC) held on 21 May 2026 focused on regional economic integration, cross-border labour mobility and trade facilitation, while the signing of four bilateral instruments and the establishment of a Coordination and Implementation Committee reflected an emphasis on execution rather than policy declaration. Similarly, President Netumbo Nandi-Ndaitwah's working visit on 12 June 2026 reaffirmed the depth of South Africa-Namibia economic cooperation under the Southern African Customs Union (SACU) and the Southern African Development Community (SADC) frameworks. Collectively, these engagements point to a strategy of strengthening regional economic linkages as a means of expanding commercial opportunities, enhancing resilience and mitigating the risks associated with an increasingly uncertain external trade environment.

Deepening Global Partnerships

- South Africa's global partnership strategy over the past six months has increasingly reflected an effort to diversify trade, investment and diplomatic relationships amid growing uncertainty in the global economic environment. This approach has been particularly evident in the deepening of ties with the EU, where investment-led cooperation linked to industrialisation and the energy transition has emerged as a central pillar of engagement. On 9 February, South Africa and the EU co-hosted their third Joint Investment Seminar on the margins of the Mining Indaba in Cape Town, bringing together more than 200 senior stakeholders across business, finance, industry and government. The engagement reinforced the EU-South Africa Strategic Partnership through industrial collaboration, regulatory alignment and job creation, with a clear focus on supporting South Africa's weak growth trajectory.
- This was underpinned by the Clean Trade and Investment Partnership, the Strategic Partnership on sustainable minerals and metals value chains, and the EU's Team Europe Global Gateway package of approximately €12 billion (around R240 billion) directed toward South Africa's Just Energy Transition. Collectively, these instruments signal a shift toward tightly coordinated investment frameworks linking decarbonisation with industrial upgrading while strengthening relations with one of South Africa's most established and predictable economic partners.
- This momentum was widened two months later when President Ramaphosa undertook a working visit to Spain on 16 April, participating in the "In Defence of Democracy Initiative" launched by Brazil and Spain in 2024. The visit combined high-level political engagement with King Felipe VI and Prime Minister Pedro Sánchez with a business forum that highlighted rising bilateral trade of approximately €2.8 billion (R52.8 billion), including South African exports reaching €1.3 billion (R24.5 billion), positioning Spain as South Africa's fastest-growing EU trading partner. Beyond the political symbolism, the visit reinforced South Africa's efforts to expand commercial relationships with stable international partners at a time of heightened uncertainty in global trade policy.
- The political dimension of the visit emphasised concerns over rising geopolitical fragmentation, weakening multilateral institutions and increasing disregard for international law, reinforcing South Africa's positioning as a defender of a rules-based global order while maintaining pragmatic economic engagement with European capital.
- However, the absence of a joint declaration due to divergences over geopolitical language underscored internal fragmentation within the bloc, particularly on positions relating to the US and Israel. While BRICS remains strategically important for South Africa's multipolar positioning and financial diversification agenda, these tensions highlight limits to policy coherence when compared with the more structured and economically focused engagement frameworks characterising South Africa's partnerships with the EU and individual European states.

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- For investors, this contrast reinforces the growing importance of South Africa's strategy of maintaining multiple external partnerships. While BRICS continues to provide opportunities for geopolitical and financial diversification, engagements with the EU and key European partners offer comparatively greater institutional predictability, investment certainty and long-term economic cooperation.

Economy and Trade

Growth and Inflation

- South Africa's growth and inflation profile in the first half of 2026 broadly aligns with the outlook projected at the beginning of the year. The January forecast anticipated modest economic expansion, contained inflation and continued structural constraints, building on the gradual recovery recorded during 2025. Developments during the first six months of 2026 suggest that this trajectory has largely materialised, although growth remains insufficient to address deep-seated employment and productivity challenges.

GDP

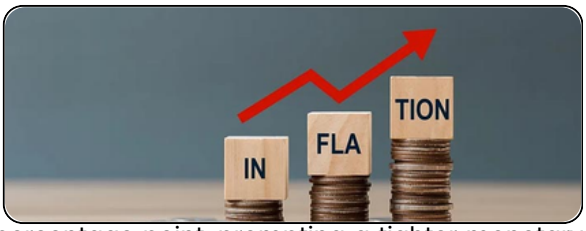
- The January outlook projected real GDP growth of between 1.4% and 1.8% for 2026, supported by improvements in electricity availability, logistics performance and fiscal management. Real GDP expanded by 0.5% in Q1 2026, extending a six-quarter growth sequence and signalling continued, albeit limited, economic momentum. This follows the gradual recovery recorded in 2025, when real GDP expanded by 2.4%, supported by mining, agriculture and manufacturing activity.
- Sectoral performance nevertheless remained uneven. Manufacturing contracted for a second consecutive quarter, continuing to weigh on industrial output and overall productivity. This weakness was partially offset by gains in mining, agriculture and broader services activity, but not at a scale sufficient to materially shift the economy onto a higher growth path. The first-half performance therefore supports the January assessment of stabilisation on fragile foundations rather than a decisive economic acceleration.

Unemployment

- Labour market conditions have evolved less favourably than anticipated. While the January forecast expected unemployment to remain above 30% with only gradual improvement in the absence of deeper structural reforms, unemployment instead increased to 32.7% in Q1 2026. This represents a deterioration from the 31.9% recorded in Q3 2025 and underscores the economy's constrained employment absorption capacity despite continued GDP growth.

Inflation

- Inflation developments have diverged somewhat from the January projection that price growth would remain within the South African Reserve Bank's revised target range, with external shocks introducing greater volatility than initially anticipated. After easing to 3.5% by November 2025, inflation rose to 4.5% in May 2026, driven primarily by fuel price increases linked to global oil market volatility and geopolitical tensions in the Middle East.



- Inflation consequently exceeded the SARB's target range of 3% ± 1 percentage point, prompting a tighter monetary policy stance, including a 25-basis point repo rate increase to 7.0% in May 2026. Overall, price developments reflect supply-side pressures rather than demand-driven overheating, while weak manufacturing performance continues to limit the potential for a stronger and more balanced recovery. The inflation outlook therefore remains relatively contained, but has evolved under less favourable external conditions than anticipated at the start of the year.

Fiscal and Investment Environment

- South Africa's fiscal and investment environment in mid-2026 broadly reflects the trajectory anticipated at the beginning of the year. The January forecast identified stabilising public finances, a primary surplus and improving investor sentiment as important supports for economic recovery. These trends have largely persisted, with ratings agencies, including S&P and Fitch, maintaining broadly stable outlook positions and reflecting cautious confidence in fiscal consolidation efforts and incremental progress in macroeconomic management.
- While sovereign risk remains elevated, the absence of negative rating action has contributed to improved market stability and more contained risk perceptions. Investor sentiment toward key state-owned enterprises has also shown marginal improvement, particularly in relation to Eskom, reflecting operational stabilisation efforts and reduced near-term systemic risk concerns.
- Foreign direct investment prospects have been reinforced by structured investment diplomacy, particularly through the EU-South Africa Investment Seminar held on 9 February in Cape Town. The prospects reflect increasing alignment between South Africa's industrial policy priorities and external capital allocation strategies.
- Domestically, the GNU has contributed to improved policy predictability by embedding coalition governance, introducing institutional checks and reducing the risk of abrupt policy shifts. While implementation constraints remain significant, the combined effect of stable ratings sentiment, structured investment pipelines and enhanced political coordination points to a cautiously improving investment environment, consistent with the stabilisation trajectory identified in both the January forecast and the economic recovery observed during 2025.

Infrastructure and Utilities

- South Africa's infrastructure and utilities landscape continues to reflect a dual trajectory of persistent municipal service delivery constraints alongside gradual improvements in national network infrastructure. This outcome largely aligns with the January assessment that improved electricity availability and logistics performance would support economic stabilisation, while structural weaknesses would continue to constrain growth.
- Local government systems remain under strain, particularly in water infrastructure such as Johannesburg, where ageing assets, maintenance backlogs and financial pressures continue to undermine service reliability. These challenges reflect deeper structural weaknesses in municipal governance and remain a key constraint on urban economic efficiency and service delivery outcomes.
- At the national level, however, infrastructure performance shows clearer signs of gradual improvement. Eskom's operational outlook heading into the 2026 winter period reflects reduced load-shedding risk compared to previous cycles, building on the operational gains and improved financial performance recorded during 2025. This stabilisation is closely linked to reforms under Operation Vulindlela (Phase II progress report, April 2026), which continues to advance energy market liberalisation, expanded private generation participation and improvements in transmission planning.
- In the logistics sector, Transnet's allocation of additional rail operating slots to private companies in May 2026, alongside rising port throughput levels, reflects early progress toward increased network efficiency. While these reforms remain in implementation phase and structural constraints persist, they collectively indicate incremental but tangible improvements in infrastructure functionality and medium-term economic resilience. As anticipated at the start of the year, infrastructure reform remains one of the principal drivers supporting economic stabilisation despite continued structural constraints elsewhere in the economy.

Risks and Outlook

Risk Dashboard

Topic	Risk	Likelihood
Governance	Constitutional friction arising from the Phala Phala process and GNU coalition management	Moderate
	Escalation of provincial coalition instability (Gauteng/KZN fragmentation)	High

Politics	Migration-driven electoral polarisation ahead of 2026 LGE	High
	Intensified electoral competition and fragmentation across opposition and left-wing formations	Moderate-High
Foreign Policy	External trade uncertainty and tariff volatility accelerating market diversification pressures	Moderate-High
	Diverging geopolitical alignments between BRICS and Western partners limiting policy coherence	Moderate
Economy and Trade	Stagnant economic growth caused by structural limits and a struggling manufacturing sector	High
	Inflation volatility arising from external energy and commodity shocks	High
	Weak private investment uptake despite improved sentiment	Moderate
	Infrastructure execution gaps, especially municipal systems, limiting productivity gains	High

July–December 2026 Outlook

Governance

- Over the next six months, national governance is likely to remain broadly stable under the GNU, but the quality of that stability will matter more than its formal survival. The Phala Phala process will test coalition discipline, parliamentary procedure and institutional accountability, while provincial coalitions in Gauteng and KwaZulu-Natal face growing strain ahead of the November 2026 LGE. The main stakeholder risk is not imminent national collapse, but uneven governance performance and policy inconsistency across subnational administrations.

Politics

- Political dynamics are expected to be dominated by the November 2026 LGE, with migration, unemployment and service delivery remaining central mobilisation themes. Parties are likely to keep converging around stricter migration enforcement while competition for urban and working-class constituencies intensifies. For clients, campaign pressure may translate into sharper policy rhetoric, more visible enforcement activity and heightened localised mobilisation, even where national policy continuity remains broadly intact.

Foreign Policy

- Foreign policy is expected to remain oriented toward economic diplomacy and trade diversification. Regional engagement through SADC and SACU is likely to deepen, while partnerships with the European Union and key European states expand through investment-led cooperation. Global trade and tariff uncertainty will reinforce Pretoria's efforts to broaden export markets and investment partnerships. The issue to watch is whether diplomacy converts into bankable investment, improved market access and clearer implementation pathways for companies operating in or trading with South Africa.

Economy and Trade

- Economic performance is expected to remain on a low-growth stabilisation path broadly consistent with the January forecast. Infrastructure reform, energy improvements and investment mobilisation should continue supporting modest growth, but unemployment, manufacturing weakness and municipal service delivery constraints will keep weighing on productivity. For investors and operators, the second half of 2026 will be defined by execution risk: whether improvements in energy, logistics and fiscal credibility translate into stronger private investment, job creation and more reliable operating conditions.

Conclusion

- The first half of 2026 was defined less by disruption than by the consolidation of trends already visible in 2025. South Africa remained broadly on the stabilisation path projected at the start of the year, supported by improved energy availability, logistics reform, fiscal management and investor confidence. The economy avoided significant deterioration, inflation remained manageable despite external pressures, and the GNU proved more durable than many expected.
- Yet stability should not be mistaken for the resolution of underlying structural challenges. Economic growth remains too weak to materially reduce unemployment, manufacturing continues to underperform, and municipal service delivery failures persist as a significant constraint on productivity and investment. The country's recovery therefore remains gradual, uneven and vulnerable to both domestic and external shocks.
- Politically, the most significant development may be the relocation of risk from the national to the subnational sphere. While the GNU has thus far weathered internal tensions, provincial coalition politics in Gauteng and KwaZulu-Natal have emerged as increasingly important determinants of governance stability. As parties position themselves for the November 2026 Local Government Elections, coalition arithmetic, electoral competition and political fragmentation are likely to place growing pressure on provincial administrations.
- Externally, South Africa's response to an increasingly uncertain global environment has been characterised by pragmatic diversification. Efforts to deepen regional integration, strengthen ties with European partners and maintain engagement within BRICS reflect an emerging strategy aimed at reducing exposure to volatility in global trade and geopolitical relations. The sustainability of this approach will depend on Pretoria's ability to convert diplomatic engagement into tangible economic outcomes.
- Overall, South Africa enters the second half of 2026 in a stronger position than many anticipated, but its central challenge remains unchanged: translating macroeconomic stabilisation, institutional resilience and diplomatic engagement into sustained growth, employment creation and improved governance outcomes. The trajectory is positive, but its foundations remain fragile. Frontline Africa will continue monitoring the political, economic and policy signals that matter most for decision-makers as the country moves toward the November LGE and a more contested second half of the year.

About Frontline Africa Advisory

Frontline Africa Advisory is a Level 1 B-BBEE strategic public affairs advisory firm based in Pretoria. Founded in 2015, the firm supports private companies and organisations in understanding South Africa’s public policy, regulatory and political environment, while helping them build meaningful relationships with critical stakeholders.

With more than 50 years of combined experience across the public and private sectors, Frontline Africa Advisory provides client-oriented solutions in public policy and regulatory affairs, government relations, stakeholder mapping and engagement, political risk advisory, political communications, coalition building and community engagement. The firm’s work is rooted in a practical understanding of policy-making processes, institutional decision-making and the political economy that shapes business operating environments.

Frontline Africa Advisory monitors policy developments, assesses their potential impact on clients, and provides tailored recommendations to help organisations anticipate risks, identify opportunities and engage constructively with government, political, regulatory and societal stakeholders. Its approach combines political intelligence, strategic communication and stakeholder choreography to support informed decision-making and mutually beneficial outcomes.

Core areas of expertise include:

- Public policy and regulatory affairs advisory
- Government relations and stakeholder engagement
- Political risk advisory and policy analysis
- Stakeholder mapping, coalition building and engagement strategy
- Political communications and community engagement

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