

FRONTLINE AFRICA
ADVISORY

SPECIAL ELECTIONS REPORT

THE 2026 LOCAL GOVERNMENT ELECTIONS: FROM ELECTORAL EROSION TO COALITION NORMALISATION

30 October 2026

1. Executive assessment

South Africa approaches the 2026 Local Government Elections (LGE) on 4 November against a political landscape that is substantially different from that which prevailed when the previous local elections were held in 2021. The decisive change is not simply the decline of the African National Congress (ANC), although that remains the central electoral trend. More consequentially, South Africa is moving from a dominant-party political system towards a fragmented, competitive and increasingly coalition-dependent system in which no single opposition party appears capable of replacing the ANC nationally or across most of the country's major municipalities.

The 2024 National and Provincial Elections established the political inflection point. The ANC received 40.18% of the national vote, losing its outright majority for the first time since 1994 and subsequently entering a Government of National Unity (GNU). The 2026 Local Government Elections will test whether the 2024 outcome represented a temporary disruption or the beginning of a more durable realignment of South African politics (HSRC Political Landscape Report, 2026).

The evidence available by August/September 2026 suggests that the latter interpretation is increasingly more credible. The ANC's electoral erosion is visible in national polling, by-election performance, metropolitan voting intentions and broader measures of political trust and democratic satisfaction. At the same time, however, the evidence does not support a simplistic interpretation in which voters are merely transferring their support from the ANC to the Democratic Alliance (DA). The emerging pattern is better understood as fragmented rather than substitution.

The July 2026 Social Research Foundation (SRF)/The Common Sense national poll placed the ANC at 34%, the DA at 27%, uMkhonto weSizwe Party (MKP) at 15%, the Economic Freedom Fighters (EFF) at 7% and the Inkatha Freedom Party (IFP) at 5%. The poll, conducted between 8 and 31 July among 2,214 respondents, therefore confirmed continued ANC decline but also demonstrated that the opposition vote remains distributed across several parties rather than consolidating behind a single challenger (The Common Sense, 2026).

The latest Ipsos findings, published on 4 September 2026 but based on fieldwork conducted during June and July, provide an important methodological counterweight. Among registered voters who selected a party, Ipsos recorded support of 31% for the ANC, 25% for the DA, 14% for MKP and 11% for the EFF. Importantly, Ipsos cautions that these figures should not be interpreted as forecasts because campaigning remained underway and significant numbers of voters remained persuadable (Ipsos, 2026).

The differences between the polling organisations are less important than the common structural message. Neither dataset points towards an ANC recovery to majority status. Neither points towards a single opposition party establishing national dominance. Instead, both indicate a competitive and fragmented electoral field in which turnout, local dynamics, candidate quality and coalition negotiations could determine the actual distribution of power.

The HSRC's Voter Participation Survey, released on 24 March 2026, adds a deeper explanation for this fragmentation. It found that only 36% of respondents expressed a preference for democracy as the best form of government, while 34% expressed fatalism and 26% openness to non-democratic alternatives. Only 12% believed that the country was moving in the right direction, while just 17% expressed satisfaction with the way democracy was functioning (HSRC Political Landscape Report, 2026). This suggests that the 2026 election is not simply a contest between parties. It is also a referendum on political efficacy: whether voters believe that participating in politics can produce meaningful changes in their daily lives.

For business and investors, the consequence is significant. Political risk can no longer be assessed primarily through national party support. The more relevant unit of analysis is increasingly the municipality, province, coalition configuration and institutional capacity of government. The principal question is not simply who wins an election, but whether the resulting governing arrangement can produce predictable administration, functioning infrastructure, credible procurement, stable licensing and permitting processes, and reliable delivery of basic services. Thus, the local government elections can be framed as 'South Africa is transitioning from party-dominant political risk to governance-dependent political risk".

2. From dominant-party politics to fragmented competition

The most important political development since 1994 has been the gradual weakening of the ANC's electoral dominance. The process has been visible for more than a decade, but 2024 established a new political baseline. The ANC's 40.18% national result represented a major break from the historical pattern in which the party could govern without depending on opposition parties.



At local level, however, the decline has been even more consequential. The ANC received approximately 45.6% in the 2021 Local Government Elections, compared with 40.2% in the 2024 national election. The trend-based analysis in the HSRC Political Landscape Report projects an ANC range of approximately 28-33% for the 2026 local elections, while placing the DA in a 23-28% range, MKP at 8-13%, the EFF at 7-10%, the IFP at 4-6% and smaller parties collectively at approximately 15-20% (HSRC Political Landscape Report, 2026).

These figures should not be treated as a forecast in the conventional sense. The report itself stresses that the ranges are trend-based bands rather than predictions and recommends applying a margin of approximately three percentage points (HSRC Political Landscape Report, 2026).

Nevertheless, the direction is difficult to dismiss. Across 154 wards contested between June 2024 and March 2026, the ANC reportedly lost an average of approximately 27% of the wards it defended. Its retention rate fell from 79.4% in 2024 to 70.6% in 2025 and approximately 50% in early 2026 contests. At the same time, smaller and emerging parties captured approximately 26% of contested wards, with 82% of their victories representing new acquisitions rather than simple retentions (HSRC Political Landscape Report, 2026).

This is strategically important because local elections expose political weaknesses that national elections can obscure. National elections encourage voters to think in terms of presidential leadership, national identity, ideology and broad political narratives. Local elections are more closely connected to tangible experiences: whether water is available, whether refuse is collected, whether roads are maintained, whether electricity is reliable, whether municipal officials answer complaints, and whether businesses can obtain permits.

The result is a political environment in which incumbency itself can become an electoral liability. Yet the evidence does not suggest that dissatisfaction automatically translates into support for the largest opposition party. Instead, voters are increasingly willing to experiment with smaller parties, regional parties, independent candidates and new political formations.

The growth of the Patriotic Alliance (PA), the persistence of the IFP, the emergence of MKP as a major KZN force and the continued presence of ActionSA illustrate this fragmentation. The SACP's decision to contest the 2026 local elections independently of the ANC for the first time since 1994 introduces an additional potential source of vote-splitting on the ANC's traditional left flank (HSRC Political Landscape Report, 2026).

The emerging system is therefore not one in which "ANC voters become DA voters". It is one in which the political market is becoming more competitive, more fluid and more locally differentiated.

3. The ANC: decline without collapse



The ANC remains the largest national political organisation in South Africa, but the evidence increasingly suggests that it is no longer the country's default governing party. The distinction between decline and collapse is important.

An electoral collapse would imply that the ANC has lost the organisational and social foundations required to remain a major national political force. The evidence does not support that conclusion. The ANC retains extensive organisational networks, historical legitimacy, incumbency advantages, established relationships with communities and trade unions, and substantial support in provinces such as Limpopo and the Eastern Cape.

What is changing is the size and geographic distribution of its support. The HSRC Political Landscape Report argues that local elections are likely to expose ANC weaknesses more sharply than national elections because the party's historical support is increasingly disconnected from perceptions of current municipal performance (HSRC Political Landscape Report, 2026).

The July SRF/Common Sense poll reinforces this conclusion by placing the ANC at 34% nationally, down from 39% in March 2026 (The Common Sense, 2026).

The more striking evidence is metropolitan. The SRF/Common Sense research placed the ANC at only 18% in Johannesburg, compared with 42% for the DA, 13% for MKP, 10% for ActionSA and 8% for the EFF. In eThekwini, the ANC was similarly positioned at 18%, behind MKP at 33%, the DA at 23% and the IFP at 16% (HSRC Political Landscape Report, 2026).

The Ipsos findings tell a broadly similar story, although with different numbers and methodology. Ipsos identifies Johannesburg, Ekurhuleni, Nelson Mandela Bay and Buffalo City as particularly competitive, while finding MKP dominant in eThekwini and the DA dominant in Cape Town (Ipsos, 2026).

Exhibit 1: 2026 LGE National and Metropolitan Support (Polling vs. Historical Results)

Geographic Area	Party	2021 LGE Result (%)	2024 NPE Result (%)	2026 Q2 Polling (%)	2026 Q3 Polling (%)	Trend (2021–2026)
National	ANC	45.6	40.18	34	31	📉
	DA	21.6	21.81	27	25	📈
	MKP	N/A	14.58	15	14	🆕
	EFF	10.31	9.52	7	11	➡️
	IFP	5.7	3.85	5	N/A	➡️
	Other	16.79	10.06	12	N/A	📉
Johannesburg	ANC	33.6	24.1	18	20	📉
	DA	26.47	30.5	42	38	📈
	MKP	N/A	11.5	13	12	🆕
	EFF	10.6	11	8	13	➡️
	Other	29.33	22.9	19	17	📉

eThekwini	**ANC**	42.02	19.3	18	22	📉
	DA	25.6	21.1	23	21	📉
	MKP	N/A	45.1	33	55	🆕
	EFF	10.48	11.2	N/A	N/A	➡️
	Other	21.9	3.3	N/A	N/A	📉

(Sources: IEC, SRF/The Common Sense, Ipsos. LGE = Local Government Elections, NPE = National & Provincial Elections.
The data confirms the ANC's decline to a low-30% range nationally and, more dramatically, to below 20% in two key economic hubs (JHB and eThekwini). The fragmentation is evident in the 10-15% support bands for MKP and EFF, making single-party rule in major metros highly improbable.)

The ANC's challenge is therefore not simply losing votes. It is losing the ability to assume that historical electoral loyalties will translate into governing majorities.

There is, however, an important reason why ANC support should not be assumed to collapse uniformly. The HSRC data suggests that many voters remain politically attached to the ANC even when dissatisfied with government performance. Historical delivery matters. RDP housing, electrification, social grants, clinics, roads and other tangible improvements created cumulative forms of political loyalty. Dissatisfaction with present performance therefore does not necessarily create enthusiasm for an alternative (HSRC Political Landscape Report, 2026).

This produces a paradox. The ANC can lose voters without those voters becoming active opposition supporters. Some may move to another party; others may abstain. The latter is particularly important because declining turnout can exaggerate or suppress the apparent strength of particular parties depending on which constituencies are mobilised.

The strategic implication is that the ANC's "floor" remains uncertain. A result in the high 20s would represent a historic decline. A result in the mid-30s would still represent substantial erosion but leave the party as the largest national political force. Either outcome, however, would reinforce coalition politics.

4. The DA: strongest growth story, but not a national replacement



The DA enters the 2026 election with arguably the strongest electoral momentum of any opposition party. The party's strategic advantage is clearest in metropolitan politics. Its campaign has increasingly centred on municipal performance, service delivery, economic growth and administrative competence rather than simply opposition to the ANC.

Its Johannesburg strategy is particularly significant. The "Get Joburg Working" campaign has focused on water, roads, jobs, corruption and public safety, thereby positioning the DA around the tangible issues that voters associate with municipal government (HSRC Political Landscape Report, 2026).

The SRF/Common Sense poll's Johannesburg figures - DA 42% versus ANC 18% - provide the clearest evidence yet that the DA has established itself as the leading party in South Africa's largest economic city (The Common Sense, 2026).

The Friedrich Naumann Foundation-supported South Africa Brief similarly identifies the DA as being in a strong position across Johannesburg, Tshwane, Ekurhuleni and Nelson Mandela Bay, while retaining its dominant position in Cape Town (Moakes & Berkowitz, 2026a).

However, the DA's strength should not be confused with national dominance. The Ipsos national figures place the party at 25% among registered voters who selected a party, compared with 31% for the ANC (Ipsos, 2026).

The DA's fundamental strategic challenge is therefore geographical. It has demonstrated an ability to grow in urban and metropolitan areas, but its capacity to dominate rural South Africa remains limited. The party also faces competition from ActionSA and the PA in specific constituencies and from the FF+ in sections of the Western Cape, Gauteng, Free State, North West and Limpopo.

The DA's future role may therefore be less about replacing the ANC outright and more about becoming the central node around which opposition and coalition politics are organised.

That is potentially more significant. If the DA becomes the largest party in Johannesburg, Tshwane and Ekurhuleni, it could control or heavily influence the political agenda in Gauteng's major economic centres even without securing outright majorities. Its ability to form coalitions would then become a central determinant of municipal governance.

This creates a new form of political risk: can the party construct a coalition capable of surviving internal political disputes and maintaining administrative continuity?

5. MKP: electoral disruption with governance questions



MKP has transformed the political landscape, particularly in KwaZulu-Natal. Its emergence has fundamentally disrupted the ANC's historical dominance in KZN and contributed to the fragmentation of the province's political system. The July SRF/Common Sense polling placed MK at 15% nationally and 33% in eThekwini (The Common Sense, 2026).

The Ipsos findings are even more striking, placing MKP at 55% in eThekwini. Ipsos cautions that the metropolitan sample is subject to a larger margin of error, but the result nonetheless confirms MKP's exceptional strength in the metro (Ipsos, 2026).

MKP's significance extends beyond vote share. The party is increasingly becoming a potential kingmaker outside its core KZN constituency, particularly in Gauteng. The South Africa Brief argues that MKP could play a significant role in Ekurhuleni and potentially Johannesburg, depending on the final distribution of seats (Moakes & Berkowitz, 2026a; 2026c).

The principal uncertainty is organisational. The HSRC Political Landscape Report identifies repeated leadership changes, internal disputes and organisational instability within MKP as material considerations for assessing its coalition behaviour (HSRC Political Landscape Report, 2026).

This creates a distinction between electoral strength and governance capacity. The MKP may win substantial numbers of seats without necessarily possessing the organisational structures, experienced councillor base or coalition-management mechanisms required to translate electoral gains into stable municipal government.

For business, this distinction matters. A party can be an effective electoral vehicle while remaining an unpredictable governing partner. Consequently, MKP should not simply be classified as "high risk" or "low risk". Its risk profile is municipality-specific and dependent on whether it is an executive party, coalition partner or opposition party.

6. The EFF, IFP, PA and ActionSA: the politics of fragmentation



The decline of the EFF relative to its earlier trajectory is one of the more significant changes in the opposition landscape. The EFF has historically benefited from a strong protest vote, particularly among younger and economically marginalised voters. However, MKP has increasingly occupied part of the political space that the EFF previously dominated, particularly among voters seeking an anti-establishment alternative.

The HSRC Political Landscape Report identifies this as an important reason why the EFF may struggle to convert protest energy into local-government gains (HSRC Political Landscape Report, 2026).

The IFP presents a different model. It has demonstrated organisational resilience in KZN and has retained a meaningful regional base. The IFP's ability to govern Nongoma outright following by-election gains illustrates that smaller parties can still consolidate geographically concentrated support (HSRC Political Landscape Report, 2026).

The PA is potentially more consequential because of its ability to operate as a coalition broker. Its by-election gains in the Eastern Cape, Western Cape, Gauteng and other areas suggest that it is not merely a regional party. Its strategic value comes from the possibility that relatively small vote shares can become decisive in hung councils.

ActionSA represents another form of fragmentation. Its township and peri-urban strategy provides a route into constituencies where both the ANC and DA face vulnerabilities. The party's challenge is to translate targeted local gains into a coherent national municipal footprint.

The cumulative effect of these parties is more important than the performance of any one of them. They make it increasingly difficult for any large party to govern alone.

7. Turnout: the variable that could change everything

The most important uncertainty surrounding the election is turnout.



The HSRC Political Landscape Report notes that turnout has fallen substantially over South Africa's democratic history and identifies mobilisation on election day as one of the most important variables affecting the outcome (HSRC Political Landscape Report, 2026).

The voter roll stood at approximately 29.23 million by late August 2026, with approximately 2.1 million new voters added since 2024. However, registration does not necessarily translate into participation (HSRC Political Landscape Report, 2026).

Ipsos provides additional evidence of this uncertainty. Approximately three-quarters of registered voters surveyed said they were likely or very likely to vote, but substantial differences exist between provinces and metros. Ipsos therefore warns that turnout could be decisive in closely contested municipalities (Ipsos, 2026).

This is particularly important because turnout is unlikely to affect parties equally.

Parties with strong organisational networks may outperform their headline polling numbers if they are capable of mobilising their supporters. Conversely, parties whose support is broad but shallow may underperform.

The HSRC findings on political efficacy are therefore critical. A population in which only 36% express a preference for democracy and 34% express political fatalism is unlikely to behave like a politically enthusiastic electorate (HSRC Political Landscape Report, 2026).

The election could therefore produce an unusual combination:

- substantial political dissatisfaction
- weak attachment to traditional parties
- high levels of voter fatigue
- intense competition among mobilised minorities; and
- potentially low overall turnout.

This environment favours parties with disciplined campaign machinery and strong local networks. It also makes polling more uncertain.

A poll captures expressed intention at a particular point in time. An election measures actual mobilisation on a particular day.

8. The democratic legitimacy problem

The most concerning finding in the HSRC evidence is not the decline of any particular party. It is the weakening of citizens' confidence in democratic institutions and political efficacy.

Only 36% of respondents preferred democracy as the best form of government. Fatalism reached 34%, while 26% expressed openness to non-democratic alternatives. Only 12% believed that South Africa was moving in the right direction, and satisfaction with democracy stood at only 17% (HSRC Political Landscape Report, 2026).

Exhibit 2: South African Political Trust and Democratic Efficacy (2026)

Metric	Response (%)
Preferred Form of Government	
- Democracy is best	36
- Fatalistic / Disengaged	34
- Open to non-democratic alternatives	26
- Other/Undecided	4

Direction of the Country	
- Moving in the right direction	12
- Moving in the wrong direction	81
- Unsure	7
Satisfaction with Democracy	
- Satisfied/Very satisfied	17
- Dissatisfied/Very dissatisfied	78
- Neutral/Unsure	5
Perceived Political Efficacy	
- "Voting produces meaningful change"	29
- "Politicians listen to people"	15

(Source: HSRC Voter Participation Survey / Political Landscape Report, 2026)
A business environment where only 17% of the population is satisfied with democracy and only 12% believe the country is moving in the right direction is structurally volatile. This data underpins the risk of service delivery protests, policy instability, and a low turnout that could empower highly mobilised political minorities.

This creates a fundamentally different electoral environment. The problem is no longer simply that voters dislike particular politicians. Increasingly, citizens question whether political participation produces meaningful results.

The HSRC identifies "politicians listen to people before making decisions" as the largest gap between what citizens expect from democracy and how they evaluate its performance (HSRC Political Landscape Report, 2026).

The implications extend beyond election turnout. Low trust can increase political volatility because citizens become more willing to switch parties, support protest movements or disengage entirely. It can also weaken the legitimacy of unpopular municipal decisions and increase the probability of protest action when service delivery deteriorates.

The HSRC's recent work on youth participation in eThekwini reinforces this concern. Research found that young people frequently perceive voting as ineffective because it has not translated into jobs, better services or improved living conditions (HSRC, 2026).

This means that political parties face a credibility problem that cannot be solved through conventional manifesto promises alone.

The voter is increasingly asking: “Why should I believe you?” That question may matter more than the content of the manifesto.

9. Coalition government is becoming the new normal



The central institutional consequence of the election is likely to be the expansion of coalition government.

The country already has extensive experience with coalition governance at municipal level. The 2026 election is likely to broaden and deepen that experience.

The HSRC Political Landscape Report notes that only Cape Town and Buffalo City among the eight metropolitan municipalities have historically operated with clear single-party majorities, while most other metros have experienced coalition or multi-party arrangements (HSRC Political Landscape Report, 2026).

The Friedrich Naumann Foundation-supported South Africa Brief argues that South Africa has crossed a threshold at which coalition politics should be regarded as a permanent feature of the political landscape rather than an abnormal consequence of temporary electoral fragmentation (Moakes & Berkowitz, 2026b).

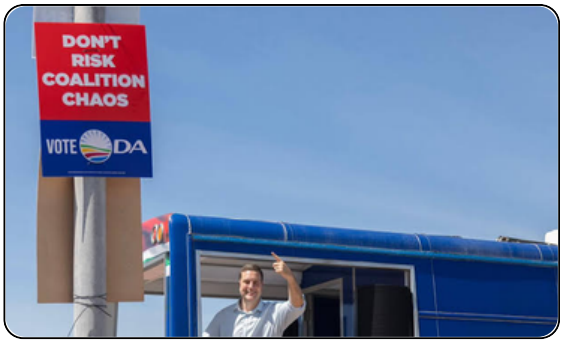
This is arguably the most important conceptual shift required for analysing South African political risk. Coalitions should no longer be treated as temporary political accidents. They should be treated as a structural feature of governance. The problem is therefore not that coalitions exist. The problem is whether they are capable of governing effectively.

The South Africa Brief identifies several requirements for more sustainable coalition government, including publicly disclosed coalition agreements, explicit decision-making rules, dispute-resolution mechanisms, cooling-off periods and incentives against opportunistic collapse (Moakes & Berkowitz, 2026b).

This is consistent with broader South African local-government scholarship, which has argued that coalition government is not inherently dysfunctional. Rather, the proportional representation system makes coalition outcomes a normal possibility, meaning political actors and institutions need to develop mechanisms capable of managing them (Dullah Omar Institute, 2023).

For business, the implication is that Coalition composition should become a core variable in political-risk assessment. A municipality with a 50%+ majority may be politically more predictable than a municipality where a party with 35% controls the mayoralty through several unstable agreements.

10. Coalition risk is governance risk



The key question after 4 November will not simply be which party wins the largest number of seats.

It will be who can assemble a governing majority, on what terms, and for how long? This requires analysing coalitions at three levels:

- The first is numerical viability: Can the coalition actually command a majority?
- The second is political compatibility: Do the coalition partners share enough policy objectives to govern together?
- And the third is institutional sustainability: Can the coalition survive disagreements without collapsing the executive?

The third is the most important. A coalition may possess a numerical majority while remaining institutionally unstable.

The South Africa Brief's analysis of previous municipal coalitions demonstrates how small parties can become kingmakers and how coalition arrangements can become vehicles for political patronage rather than coherent governance (Moakes & Berkowitz, 2026b).

Exhibit 3: Municipal Coalition Risk and Stability Matrix (Post-LGE 2026)

Coalition Model	Numerical Viability	Political Compatibility	Institutional Sustainability	Overall Business Risk Profile	Primary Risk Multipliers
Single-Party Majority (e.g., Cape Town)	✅ High	✅ High	✅ High	🟢 **Low**	Administrative capacity; Regulatory predictability.
Stable Programme-Based Coalition	✅ High	⚠️ Moderate	✅ High	🟡 **Moderate**	Public disagreements; Procurement delays; Key appointments.

Minority Government (Confidence-and-Supply)	⚠️ Moderate	⚠️ Moderate	⚠️ Moderate	🟠 **Elevated**	Budget adoption; Ad-hoc transactional bargaining; Frequent motions of no confidence.
Unstable Power-Sharing Agreement	✅ High	❌ Low	❌ Low	🔴 **High**	Constant leadership changes; Policy paralysis; Service delivery collapse; Lame-duck looting.
Fragmented / Stalemate Council	❌ Low	❌ Low	❌ Low	⚫ **Very High**	Complete governance failure; Provincial intervention (Section 139); Infrastructure contagion.

Political risk analysis must move beyond who is in the coalition to how the coalition is structured. A numerically viable coalition (e.g., 51% of seats) can still be a high-risk entity if it lacks institutional sustainability (e.g., constant internal disputes). This matrix is a critical tool for client risk assessments.

The business implication is that political-risk analysis must therefore move beyond party ideology. A company operating in Johannesburg, for example, should not merely monitor the ANC and DA. It should monitor:

- the DA-ANC relationship
- DA-ActionSA dynamics
- the potential role of MKP
- PA positioning
- EFF bargaining behaviour
- mayoral candidate relationships
- committee allocations
- budget negotiations
- procurement committees; and
- confidence-and-supply agreements.

This is a fundamentally different form of political intelligence.

11. The metro battlegrounds

The eight metropolitan municipalities deserve disproportionate analytical attention because they concentrate economic activity, infrastructure, corporate assets, municipal revenue and political visibility.

They are also the areas where polling provides the clearest evidence of fragmentation.

Johannesburg

Johannesburg is the principal political and economic battleground. The SRF/Common Sense poll's 42% DA versus 18% ANC result represents a dramatic shift in the political balance (The Common Sense, 2026). But a DA lead does not automatically translate into a stable DA administration.

Johannesburg's 270-seat proportional representation system makes outright majorities difficult, meaning coalition negotiations are likely to remain central.

The city's water crisis and broader municipal performance problems make governance competence particularly important. The HSRC report highlights the relationship between municipal dysfunction and business exposure, noting that municipalities provide critical services including water, electricity distribution, roads, permitting and rates (HSRC Political Landscape Report, 2026).

Tshwane

Tshwane is likely to remain a critical DA-ANC contest with potential participation by ActionSA, MKP and smaller parties. The latest eNCA/MarkData polling places the DA ahead of the ANC in Tshwane, with the FF+ also featuring among the smaller parties in the competitive electoral landscape. The strategic significance of Tshwane extends beyond municipal government because it is the administrative capital and a key centre of national political activity.

Ekurhuleni

Ekurhuleni is potentially one of the most volatile metros. The combination of ANC decline, DA competition, ActionSA's Gauteng presence and possible MKP's expansion creates a multi-party contest in which coalition arithmetic may be particularly complicated.

eThekwini

eThekwini presents the clearest example of regional political realignment. MKP's polling strength suggests that the ANC could face an unprecedented loss of dominance in its traditional KZN metropolitan base. Ipsos's 55% MKP figure is particularly significant, although the relatively large metro margin of error requires caution (Ipsos, 2026).

The IFP remains important, making post-election coalition negotiations potentially complex.

Cape Town

Cape Town remains the clearest case of stable one-party governance. Ipsos places the DA at 46%, reinforcing its position as the dominant party in the metro (Ipsos, 2026). The strategic question is therefore not whether Cape Town will become coalition-dependent but whether the DA can translate its metropolitan dominance into wider provincial influence.

Nelson Mandela Bay

Nelson Mandela Bay is likely to remain highly competitive, with ANC, DA and PA dynamics potentially producing a hung council.

Buffalo City

Buffalo City presents a more complex environment in which the ANC remains relevant while the EFF has demonstrated significant support. Ipsos places the EFF at 27% in the metro, although the sample size means the result should be treated cautiously (Ipsos, 2026).

Mangaung

Mangaung is another municipality where ANC dominance may weaken sufficiently to create coalition pressure. The wider metro picture therefore demonstrates why a national vote-share model cannot adequately predict local governance outcomes.

12. The GNU and PGUs



The consequences of the local elections will not stop at municipal boundaries. The 2026 LGE will occur within the broader institutional experiment represented by the GNU and the Governments of Provincial Unity (GPUs) in Gauteng and KwaZulu-Natal.

The Friedrich Naumann Foundation-supported South Africa Brief argues that the local election campaign could create tensions among parties that cooperate nationally but compete aggressively at municipal level (Moakes & Berkowitz, 2026c).

This is particularly important in Gauteng. If the DA emerges as the largest party in Johannesburg, Tshwane and Ekurhuleni while the ANC remains dependent on smaller parties at provincial level, the political balance within the Gauteng government could become increasingly difficult to sustain.

Similarly, a strong MKP's performance in KZN could place additional pressure on the IFP-led GPU. The local election could therefore function as a political stress test for the national coalition architecture.

A strong DA performance could strengthen the party's bargaining power within the GNU. A strong MKP's performance could strengthen its national relevance. A severe ANC metropolitan decline could weaken the party's bargaining position even if it remains the largest national party.

The result is that 4 November should not be viewed as a stand-alone local election. It is potentially a reconfiguration point for South Africa's entire coalition system.

13. Municipal performance and economic risk

The political significance of the election ultimately rests on municipal performance. Municipalities provide the infrastructure through which businesses operate.

Water, electricity distribution, roads, waste management, land-use approvals, building permits, rates, public safety and local economic development are all affected by municipal capacity.

Exhibit 4: Key Metro Performance and Fiscal Risk Indicators (2026)

Municipality	Municipal Creditor Debt (R'bn)	Eskom Arrears (R'bn)	Audit Outcome (2024/25)	Service Delivery Performance Index (0-10)	Fiscal Distress Rating
Johannesburg	21.5	6.8	Qualified	3.5	🔴 **High**
eThekwini	18.2	4.1	Qualified	2.8	🔴 **High**
Tshwane	15.9	8.2	Adverse	3.1	🔴 **High**
Ekurhuleni	12.4	3.5	Clean	4.5	🟠 **Elevated**
Cape Town	3.1	0.2	Clean	7.9	🟢 **Low**
Nelson Mandela Bay	6.5	2.1	Qualified	4.2	🟠 **Elevated**
Buffalo City	4.8	1.8	Qualified	3.9	🟠 **Elevated**
Mangaung	5.1	2.9	Adverse	2.5	🔴 **High**

(Sources: Auditor-General SA, National Treasury, HSRC. Service Delivery Index is a composite score of water, electricity, and waste reliability.)

Political fragmentation in Johannesburg, Tshwane, and eThekwini is directly correlated with high fiscal distress and poor service delivery. This data provides the definitive justification for the report's recommendation for businesses to invest in "self-sufficiency infrastructure" (e.g., backup power, water storage).

The HSRC Political Landscape Report highlights a wider municipal fiscal crisis, including approximately R131.8 billion in municipal creditor debt and substantial municipal arrears to Eskom (HSRC Political Landscape Report, 2026).

The report also identifies widespread financial distress among municipalities and weak audit performance. This means political fragmentation interacts with pre-existing institutional weakness.

A municipality that is already financially distressed may be able to survive a stable coalition. The same municipality may deteriorate rapidly under a coalition that cannot agree on budgets, appointments or procurement.

Political instability therefore acts as a multiplier of administrative weakness. The risk is not merely that a mayor changes, but rather that political uncertainty delays:

- capital expenditure
- procurement decisions
- infrastructure projects
- senior appointments
- municipal budgets
- payment to service providers
- regulatory approvals; and
- long-term investment planning.

For companies operating in infrastructure-intensive sectors, these delays can have material financial consequences.

14. The emerging business risk framework



The 2026 political environment requires a different approach to political-risk analysis.

A conventional approach might ask: Which party will win? A more useful framework asks: What political configuration will govern the municipality, how stable will it be, and what will that mean for the company's operating environment?

This suggests five dimensions of risk:

1. Electoral risk: Who wins the largest share of votes?
2. Coalition risk: Who forms the governing coalition?
3. Institutional risk: Can the administration implement decisions?
4. Fiscal risk: Does the municipality have the financial capacity to deliver services?
5. Social risk: Will deteriorating services generate protests, political mobilisation or community resistance?

The advantage of this framework is that it prevents overreliance on polling. Polling can tell us who voters currently support. It cannot reliably tell us whether a coalition will survive for three years. That requires political intelligence.

15. Strategic outlook: five core conclusions

The integrated evidence supports five principal conclusions.

Conclusion 1: ANC decline is structural, but the depth of decline remains uncertain

The ANC is almost certainly entering the 2026 elections weaker than in 2021 and 2024. The disagreement among polling organisations concerns magnitude rather than direction.

The critical question is whether the ANC settles in the high 20s, low 30s or mid-30s. None of these outcomes restores the pre-2024 political environment.

Conclusion 2: South Africa is fragmenting rather than simply realigning

The opposition vote is distributed among DA, MKP, EFF, IFP, PA, ActionSA and smaller parties. This makes coalition government increasingly unavoidable.

Conclusion 3: Metro outcomes matter more than national headlines

Johannesburg, Tshwane, Ekurhuleni and eThekwini will have disproportionate consequences for economic confidence and political bargaining, while the national vote share may determine the headline. The metros will determine much of the governing reality.

Conclusion 4: Coalition politics is becoming institutionalised

Coalitions should no longer be treated as temporary anomalies. The key policy question is whether South Africa develops rules and political norms that allow coalitions to function.

Conclusion 5: Political risk is becoming governance risk

For business, the identity of the governing party matters less than the capacity of the governing arrangement to provide predictable administration.

15.1. Strategic implications for business

Businesses should therefore prepare for at least three post-election scenarios.

Scenario A: managed fragmentation

The ANC remains the largest national party but loses further ground. The DA performs strongly in metros, while MKP and smaller parties expand their bargaining power.

Coalitions become more widespread but remain manageable.

Business implication: moderate political risk, but higher engagement requirements.

Scenario B: Severe ANC metropolitan erosion

The ANC falls below 30% nationally and suffers major losses in Johannesburg, Tshwane, Ekurhuleni and eThekwini. The DA becomes dominant in Gauteng metros while MKP dominates eThekwini.

Business implication: high transition risk, extensive coalition negotiations and significant uncertainty around municipal policy.

Scenario C: Low-turnout fragmentation

Turnout falls significantly, with disciplined parties outperforming their broader polling support.

Smaller parties and regional organisations win disproportionate influence.

Business implication: highly fragmented councils, unstable coalition formation and elevated operational risk.

The most prudent planning assumption is therefore not a single forecast but a range of political configurations.

15.2. Strategic interpretation

The value of the framework is that no single indicator should be interpreted in isolation. The most important warning signals will occur where several indicators move simultaneously.

For example: Polling deterioration + declining turnout + ANC losses + coalition uncertainty + worsening municipal finances = elevated municipal governance risk.

Conversely: Stable coalition agreement + credible mayoral leadership + functioning administration + approved budget + improving infrastructure = declining political-operational risk.

This allows companies to move from monitoring political events to identifying changes in the operating environment before they become material business risks.

16. Final assessment

The 2026 LGE should be understood as a major structural transition in South African politics rather than simply another electoral contest.

The ANC's decline is real, but the political system is not moving neatly from ANC dominance to DA dominance. Instead, the country is entering an era in which multiple parties compete for influence, regional political identities matter more, smaller parties can acquire disproportionate bargaining power, and coalition formation becomes a normal part of government.

The SRF/Common Sense polling captures the direction of travel: ANC 34%, DA 27%, MKP 15%, EFF 7% and IFP 5% nationally. Ipsos produces different numbers but broadly confirms the absence of a dominant party and the importance of metropolitan competition. The Friedrich Naumann Foundation-supported analysis goes further, arguing that coalition politics has effectively become a permanent feature of South Africa's political system (The Common Sense, 2026; Ipsos, 2026; Moakes & Berkowitz, 2026a; 2026b).

The HSRC evidence provides the deeper explanation. South Africa's electoral volatility is occurring against a background of declining trust, low political efficacy and growing democratic fatalism. Only 36% express a clear preference for democracy, while 34% are fatalistic and 26% are open to non-democratic alternatives. Only 17% are satisfied with the way democracy is functioning (HSRC Political Landscape Report, 2026).

The danger is therefore not simply political instability, but rather governance delegitimisation.

If citizens conclude that neither elections nor coalition governments can improve services, create employment or make government responsive, electoral participation may continue to decline. In turn, lower participation can increase the influence of highly mobilised political minorities, producing even more fragmented councils and potentially less stable governments.

This creates a feedback loop of poor governance, declining trust, lower participation, fragmented mandates, unstable coalitions, and weaker governance.

Breaking this cycle will require more than electoral competition. It will require coalition agreements based on programmes rather than positions, professional municipal administrations, credible financial management, functioning accountability systems and political parties willing to treat municipal government as an instrument of public administration rather than merely an extension of electoral competition.

For business, the strategic consequence is equally clear. The old political-risk question of “who governs South Africa?” is becoming insufficient. The more relevant questions are:

- Who governs this municipality?
- With whom?
- Under what agreement?
- With what majority?
- For how long?
- And with what capacity to govern?

That is the political-risk environment that will emerge after 4 November 2026.

The election therefore marks not merely another step in the decline of dominant-party politics, but the consolidation of a new political operating environment in which fragmentation, coalition bargaining and municipal institutional capacity become central determinants of South Africa's economic and political risk profile.

END

References

1.Dullah Omar Institute. (2023). Coalitions in local government: Ideas for law reform. University of the Western Cape.
2.eNCA/MarkData - Tshwane election survey results, 25 October 2026: https://www.enca.com/news-shows-top-stories/enca-markdata-election-survey-tshwane-results-are
3.Human Sciences Research Council (HSRC). (2026). Voter Participation Survey 2025/26. Research conducted for the Electoral Commission of South Africa.
4.HSRC Political Landscape Report. (2026). The 2026 Local Government Elections: Performance Projections, Coalition Governance, and the Future of Municipal Service Delivery. July 2026.
5.Ipsos. (2026). Key metros remain battlegrounds ahead of the November Local Government Elections. 4 September 2026. Ipsos - Key metros remain battlegrounds ahead of the November Local Government Elections
6.Moakes, J., & Berkowitz, P. (2026a). A Political Landscape in Flux: The State of South Africa's Main Parties. The South Africa Brief, supported by the Friedrich Naumann Foundation for Freedom, 4 August 2026. A Political Landscape in Flux
7.Moakes, J., & Berkowitz, P. (2026b). Coalitions in South Africa: Here to Stay. The South Africa Brief, supported by the Friedrich Naumann Foundation for Freedom, 18 August 2026. Coalitions in South Africa: Here to Stay
8.Moakes, J., & Berkowitz, P. (2026c). The Local Government Election, the GNU & GPUs. The South Africa Brief, supported by the Friedrich Naumann Foundation for Freedom, 25 August 2026. The Local Government Election, the GNU & GPUs
9.The Common Sense. (2026). Support for Political Parties in South Africa. Social Research Foundation/The Common Sense polling, 12 August 2026. Support for Political Parties in South Africa
10. Social Research Foundation (SRF) & The Common Sense. (2026). Q2 2026 Market Survey. Fieldwork conducted 8–31 July 2026 among 2,214 registered voters.
11. Electoral Commission of South Africa (IEC). (2026). 2026 Local Government Elections: Voter registration and electoral preparations.
12. Auditor-General South Africa. (2025/2026). Municipal audit outcomes and local government financial management findings.
13. National Treasury. (2026). 2026 Budget Review. Republic of South Africa.
14. Human Sciences Research Council. (2026). Why young people are turning away from voting: Insights from eThekwini. 15 July 2026. HSRC — Why young people are turning away from voting