



# South African Elections: Political Fragmentation Begins

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On May 29, South Africa went to the polls for the seventh time since its first democratic elections in 1994, when Nelson Mandela led the African National Congress (ANC) to victory and then formed a government of national unity with major opposition parties.

Going into the 2024 elections, the ANC still had a majority just below 58% nationally and governs eight of nine provinces. However, ANC support reached its peak in 2004 with just shy of 70% of the national vote and has declined steadily since then as a plethora of opposition and breakaway parties – some short-lived – have chipped away at its support.

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## What we're seeing

The predicted massive decline of the ANC, where some polls indicate a fall from about 58% to 40% or less, may have been overplayed: in part because the ANC campaigning gains momentum and effectiveness in the final weeks and days before the election; and in part because the opposition parties have not coalesced or captured the public imagination as a viable alternative government.

The ANC will likely continue as South Africa's most dominant party, with a national support in the mid-40% range, which would allow it to form the nucleus of a coalition government. Even if the ANC defies naysayers and achieves over 50%, it may still form coalitions of some sort to secure support in provinces where it is not the majority.

The wild card is former President Jacob Zuma's six-month-old uMkhonto weSizwe (MK) party, which was formed too recently to undertake voter registration drives. While it is attracting huge attention, reliable data about where its support comes from is scarce. It may attract support away from the current ANC, and other parties like the Economic Freedom Fighters (EFF) and Inkatha Freedom Party (IFP), which had picked up disaffected former ANC supporters. The MK party will certainly upset the balance of power in former President Zuma's home province, KwaZulu-Natal, probably nationally.

Regarding the credibility of the outcome, the Independent Electoral Commission (IEC) has previously delivered professional, free and fair elections, albeit with delays in some areas. With around 5,000



accredited election observers from over 160 international and domestic organizations, we believe the scope for material malfeasance is low.

We do believe support for ANC will decline significantly on the national stage, and that it will lose outright control of the two most populous provinces, Gauteng and KwaZulu-Natal – bringing down the curtain on its 30-year aura of electoral invulnerability.

## What to look for

**National partners:** Should the ANC decline below 50% nationally (as appears likely), it will need coalition partners to elect the president and form a government. Should it partner with so-called “radical parties” like the EFF or MK, it will deal a blow to current President Cyril Ramaphosa’s authority and be a setback for his economic reforms. However, current expectations are that more centrist/conservative coalition partners, like the IFP, and other smaller parties will be its first choice. Before the election, markets started to price in a continuation of the Ramaphosa presidency and of his economic reforms. In contrast, a dramatic fall to the low-40% range could spell the replacement of Ramaphosa and reversal of his reforms. What will change, probably forever, is the ANC’s capacity to govern alone without seriously entertaining other parties. Consequently, business working and investing in South Africa will also need to adapt to multi-party power structures and become more adept at engaging with a far wider spectrum of political parties and actors – including civil society – than was necessary over the last 30 years.

**Provincial decline:** If the ANC loses outright control of major provinces like KwaZulu-Natal and Gauteng (as seems very likely), it will need coalition partners to govern there as well. Some of these potential partners may attempt to extract concessions at the national level. It may also, for the first time, break the ANC’s automatic dominance of the “upper house,” the National Council of Provinces.

**Fair, peaceful and credible:** Fears have been raised of the potential for political violence or protest – such as occurred in July 2021 in the KwaZulu-Natal province when former president Jacob Zuma (now leader of the MK party) was arrested. However, the police, authorities and private security are collaborating closely and were prepared for such eventualities. While it is possible that some parties/activists may challenge the overall outcome or allege specific voting/counting transgressions, the IEC has a long and strong track record of running professional and credible elections and dealing with breaches of the rules.

**Turnout of constituencies:** Over time, election turnout has been falling as South Africa’s previously very high rates of voter participation normalize. The IEC has predicted that turnout will trend higher this election, which tends to favour opposition parties. However, a granular focus is needed – as certain constituencies (e.g. older, middle class and urban) tend to have a higher turnout while young people are less likely to vote. This advantages parties like the Democratic Alliance (DA) which can mobilize their older, wealthier urban base. A low turnout signals both disengagement from the democratic process and disillusionment with the political choices on offer. So, turnout will affect not just the parties’ relative share of the vote; but also signal which constituencies are most represented and invested in the outcome.

## What happens next

It will take several days before the final election result is known, with the earliest likely announcement being June 2. However, the IEC website will show votes as they are counted, providing a meaningful sense of the key trends from Friday onwards. The deadline for parties to lodge objections is 21:00 on Friday. We do expect that if there is a higher turnout, and with three ballots (not two as in previous elections) that the scope for delayed results is higher.

After the IEC has issued the official results, the chief justice must convene parliament within 14 days. Then, after being sworn in as members of parliament, the MPs will elect the speaker and deputy speaker; after that, parliament will elect the president. Since the president is elected by a majority of

MPs, if the ANC falls below 50%, the preceding weeks of likely coalition discussions will finally crystalize. In theory any MP can stand for president, and if several do so, there will be successive rounds of voting with the least popular candidate dropping out until only two candidates remain. However, it is still likely that it will be the ANC and country’s current leader, Cyril Ramaphosa, who is elected president – the question being, with whose support?

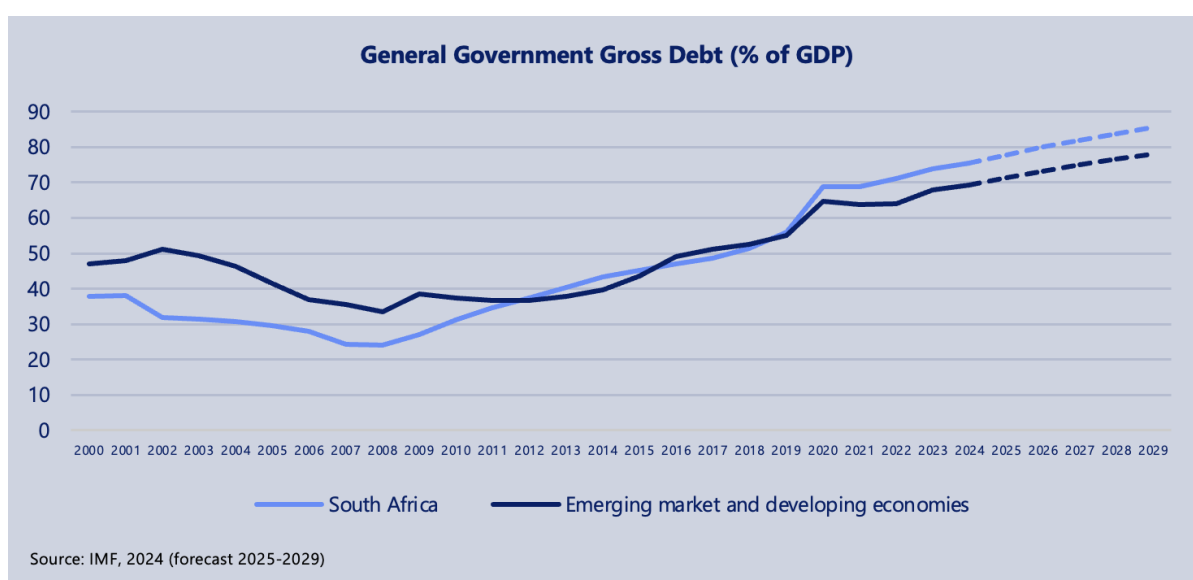
The president can then appoint his cabinet, a process which may also take several weeks. Again, it is at this point that the predicted coalition negotiations will reveal themselves through the medium of the respective parties’ cabinet positions. The final piece of this puzzle will be whether the process of appointing the cabinet also coincides with a reorganization of government with cabinet portfolios being split or consolidated to reflect the new administration’s priorities.

## The issues at play

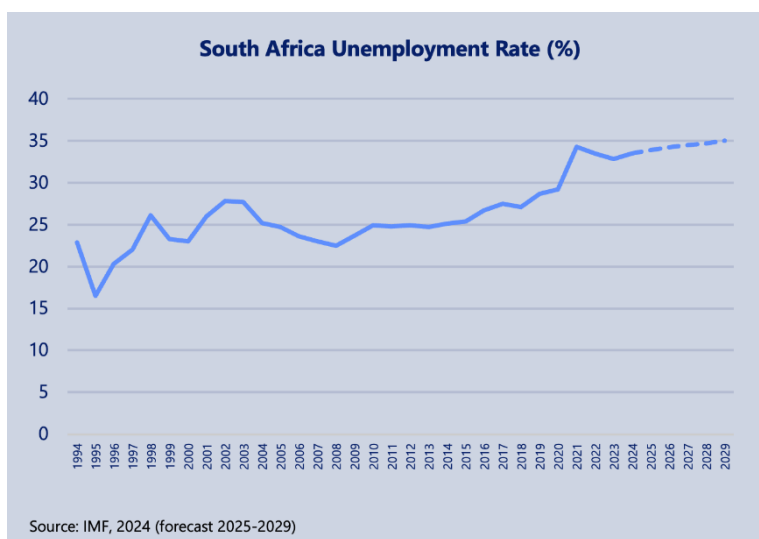
South Africa has changed dramatically over the last 30 years since becoming a constitutional democracy. Life is demonstrably better for most citizens. The country is no longer at war or isolated by sanctions. Its citizens are free. Public services – from mass housing to institutionalised access to water, electricity, education and health services have been dramatically expanded to include the previously marginalised majority black population. Importantly, an extensive social safety net of modest grants has taken the sharpest edges off pervasive poverty – which still reflects the racialised origins of the country’s apartheid history.

While this has in theory brought political rights and dignity to all, the country remains beset by both the ongoing poisonous legacy of apartheid overlaid by more contemporary challenges such as persistently low economic growth, widespread corruption, crime and “service delivery failures” by the state and from state-owned enterprises like state-owned electricity utility Eskom.

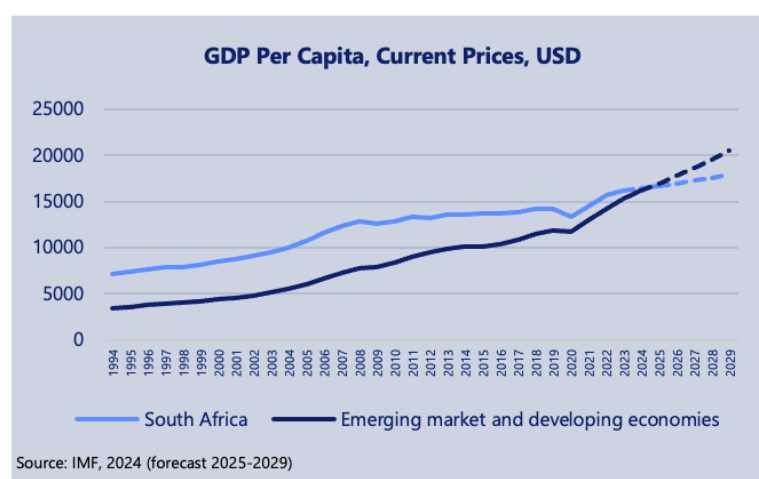
Consider a few economic indicators. For well over a decade, the economy has performed poorly, and this is reflected in many economic indicators such as the increasing government debt as a percentage of GDP – now at 75.4% in 2024 compared to 24.0% at its low point in 2008. Now debt is reducing fiscal space for government spending.



The country also faces an [unemployment rate](#) of 32.9%, which rises to 41.9% with the addition of discouraged jobseekers (who have given up looking for work) and those who have other reasons for not searching, and 45.5% when looking at youth unemployment – those aged 15-34 years. This is a startling and tragic loss of human potential, especially given South Africa’s young population, which also waters the seeds of discontent and disillusionment with the prevailing politics.



Unsurprisingly, South Africa’s GDP per capita growth has not kept pace with emerging market and developing economy peers. The IMF predicts that in 2025, South Africa’s GDP per capita of \$16,662 will fall below that of emerging market and developing economies.



Emblematic of both state and state-owned enterprise failure are pervasive power cuts – euphemistically called “load shedding” by electricity utility

Eskom. In 2023 the country endured 6,947 hours of power cuts – [the highest yet](#). Ironically, reforms introduced two years ago and greater collaboration between the private sector and government on reform and recovery of the power system are working; however, the 62 days without power cuts in the lead up to the election have been met not with celebration but suspicion that this is a political ploy, and that load shedding will resume “the week after elections.”

While the ANC has introduced several new laws and election promises, including introducing a national health insurance, institutionalizing independence for corruption-busting agencies and providing a basic income grant (in future), the collective national experience of the last decade and a half has led to a decline in the party’s popularity.

But while the ANC’s aura may have dimmed, no single opposition party or proto-coalition of parties (such as the stalled Multi-Party Charter for SA) has captured the imagination of voters. What likely lies ahead for South Africa is not a transfer of power so much as a fragmentation of power. How the pieces of this political puzzle are put together will determine the country’s way forward.

## Key context: fragmentation and dominant party decline

The ANC is set to lose outright control of the two biggest provinces by population, Gauteng (2019: 50.19%) and KwaZulu-Natal (2019: 54.22%); while the DA’s stronghold in Western Cape (2019: 55.45%) is under less-serious threat.



If the ANC falls below 50% in the national poll, as is likely, it presents the likelihood of coalition politics in South Africa at both national and provincial level. Even more intriguing will be the interplay between the deals done by the ANC, and others, to secure power in provincial coalitions and concessions they extract to impact on the national stage.

Of the opposition parties, the DA, which has large support among ethnic minorities, is the second-largest nationally and runs the Western Cape, the third-largest province (by population). Yet after years of steady growth, it too peaked in 2014 with over 22% and then declined to just under 21% in 2019. Indications are that it may also face a challenge to its clear majority in the Western Cape province in 2024. In contrast, the more “radical” EFF, an ANC breakaway party led by Julius Malema, has grown steadily since its establishment in 2013 and it now commands just under 11% of the vote. But recent polling suggests that it too may have plateaued.

The challenge faced by all three established large parties is a combination of voter apathy, disillusionment, and increased competition from small and breakaway parties. This is attributed to the rise of several new parties like ActionSA (a spinoff from the DA), which performed reasonably well in several big cities (16.05% in Johannesburg) in the 2021 local government elections; and the resurgence in popularity of the IFP, a conservative party known for its support amongst isiZulu speakers, primarily in the two most populous provinces, Gauteng and KwaZulu-Natal. In this election, 52 parties will contest the national ballot, compared to 48 in 2019 and only 27 in 2014.

However, the most destabilizing has been the ANC breakaway party MK, led by former national and ANC President Jacob Zuma. While Zuma is ineligible to become an MP due to a conviction for contempt of court, and despite his many corruption-related scandals, he remains a popular political force to be reckoned with – especially in his home province, KwaZulu-Natal.

How far the ANC falls below 50% will determine whether it can dominate a coalition of much smaller parties, or whether it needs to partner with one of the larger parties – and make significant concessions – to convene a new administration. It will take several weeks for these dynamics to resolve themselves into new administrations nationally and in the provinces.

What is clear: the ANC’s automatic hegemony is over; fragmentation and multi-party coalitions await.

## To continue the conversation



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Timothy has over 20 years of in-house and consultancy experience providing strategy, reputation, crisis, public affairs, stakeholder relations and financial communications advice to the top leadership of major public and private sector organizations in South Africa and the UK.