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The macro signal

South Africa's 2026 local government elections



Sanisha Packirisamy
Group Economist

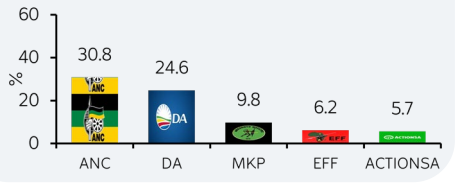


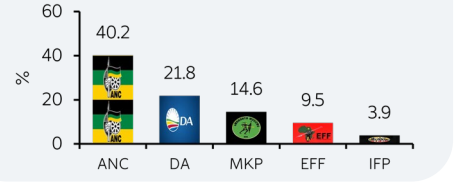
Tshiamo Masike
Economist

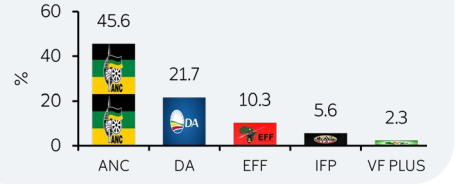


November 2026

The national picture: ANC remained dominant, but lost support

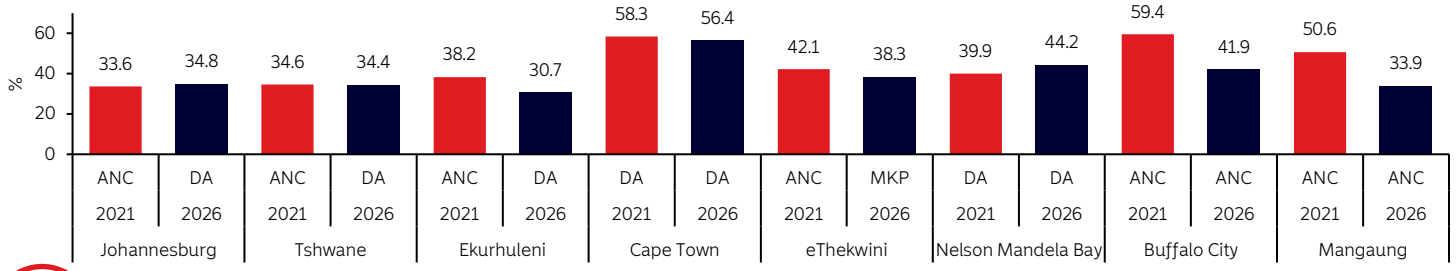






Metropolitan battleground: DA gained ground as ANC retreated

Leading party in the respective metros (2021 vs 2026)



The election in numbers: A crowded race and fragmented outcome

520
Political parties contested

29.2 million
Registered voters

52.3%
Turnout

c.137 000
Candidates for council seats

10 526
Council seats contested

138
Hung councils

Key outcomes

South Africa's 2026 local government elections (LGE) drew more voters but left councils more fragmented. Turnout rose from 45.9% in 2021 to 52%, while the ANC remained the largest party nationally despite a nearly 15 percentage point drop in its vote share to 30.8%. The DA led in five metros and won the only outright metro majority in Cape Town. The MKP led in eThekwini, while ActionSA gained bargaining power across Gauteng's three metros. With 138 of 213 municipal councils hung, including seven of the eight metros, the test is whether parties can form stable administrations that improve basic services.

* Source: Independent Electoral Commission (IEC). Election results as declared on 8 November 2026; subject to adjustment pending a ward re-election in the Northern Cape (NC).
ANC = African National Congress, DA = Democratic Alliance, MKP = uMkhonto weSizwe Party, EFF = Economic Freedom Fighters, IFP = Inkatha Freedom Party, VF Plus = Freedom Front Plus

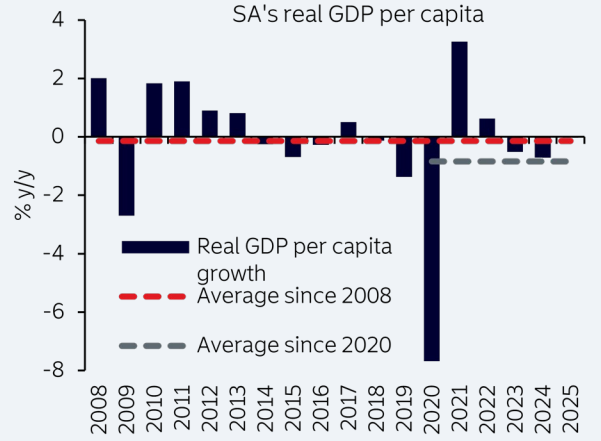
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The socio-economic backdrop to the vote

On 4 November 2026, South African (SA) voters went to the polls against a backdrop of weak real income growth, staggering unemployment and persistent poverty. Pedestrian economic growth over the past decade has failed to keep pace with population growth, eroding average living standards and intensifying pressure on households. The official unemployment rate reached 33.6% in the second quarter of 2026, equivalent to 8.5 million people. A broader measure, including discouraged work seekers who are available to work but have stopped actively looking for employment, stood at 46.3%. Young people faced particularly difficult conditions, with unemployment among those aged 15 to 34 reaching 47.4%. Limited employment opportunities constrain household spending, weaken the municipal revenue base and increase demand for subsidised services.

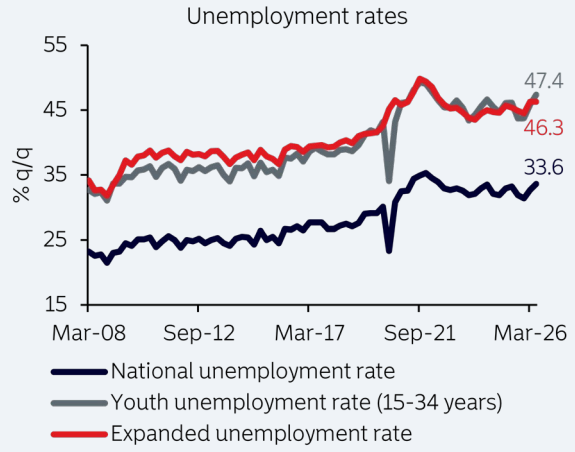
These pressures are compounded by widespread poverty. Stats SA's latest comprehensive poverty assessment found that 37.9% of the population (23.2 million people) lived below the lower-bound poverty line (LBPL) of R1 300 per person per month in 2023. This leaves many households with little capacity to absorb higher municipal tariffs or the additional costs of unreliable services. Service delivery protests reflect growing frustration with the conditions facing outgoing councils, challenges that their successors will inherit. Their ability to restore reliable services and support local investment will be important for creating an environment conducive for stronger, more inclusive growth.

Chart 1: Economic growth leaves living standards behind



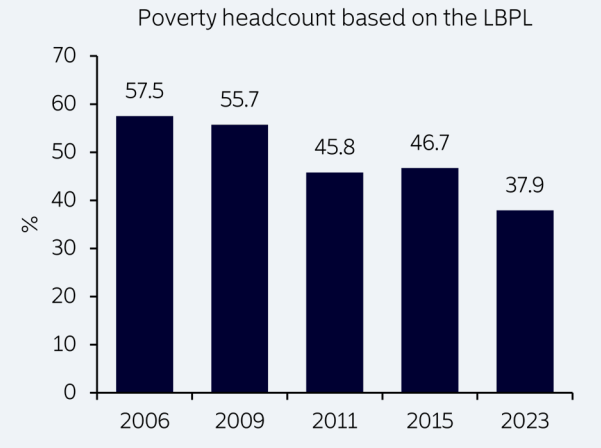
Source: World Bank, Momentum Group

Chart 2: Too few jobs for a generation waiting to work



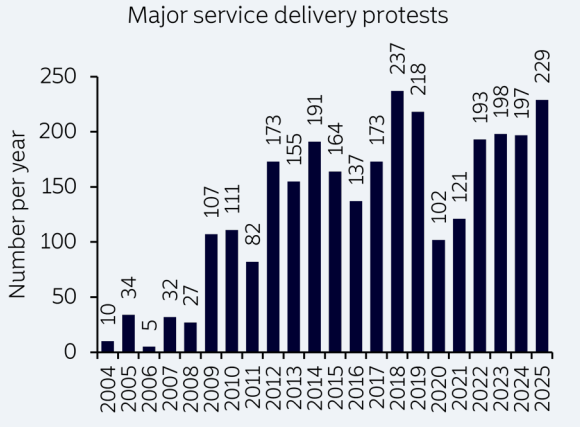
Source: Stats SA, Global Insight, Momentum Group
Data until June 2026

Chart 3: Millions still fall short of a basic standard of living



Source: Stats SA, Momentum Group

Chart 4: Frustration with failing services spills onto the streets



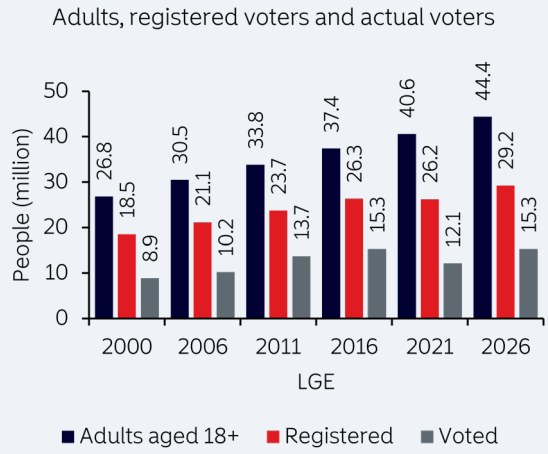
Source: Municipal IQ, Momentum Group

Who showed up?

Participation shaped the extent to which the election result reflected the preferences of South Africans eligible to vote. The IEC reported that the voters' roll exceeded 29.2 million ahead of the November 2026 municipal election. Turnout reached 52.3%, with 15.3 million people voting, leaving 13.9 million registered voters who abstained. 15.2 million eligible voters remained outside the electoral process because they had not registered. To place this election in a longer context, municipal election turnout was around 48% in 2000 and 2006, rose to 57% in 2011 and 2016, then fell to 45.9% in 2021 due to COVID and voter apathy. The latest result therefore represents a recovery in voter turnout relative to the previous municipal election, although participation remains below pre-pandemic levels.

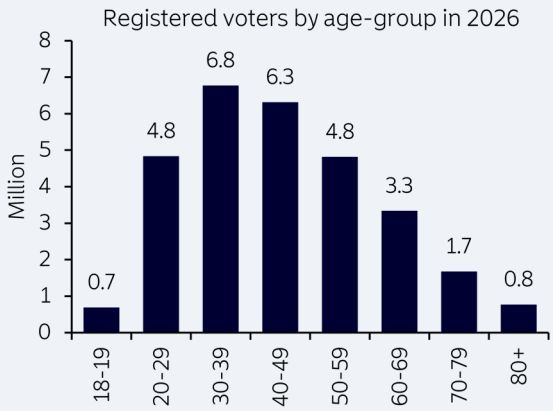
Persistent age differences also help explain the participation gap. In March 2025, registration covered 22.2% of eligible citizens aged 18 to 19 and 46.4% of those aged 20 to 29, compared with 91.4% among those aged 50 to 59. By July 2026, the IEC still reported coverage below 30% and 50%, respectively, for the two younger groups. Registration, however, does not necessarily guarantee participation. In 2021, turnout among registered voters was 35% for those aged 20 to 29 and 64% among those aged 60 to 69. Together, registration and abstention determine whose preferences carry weight. Party vote shares consequently describe support among participating voters, rather than endorsement by all eligible citizens.

Chart 5: The participation gap



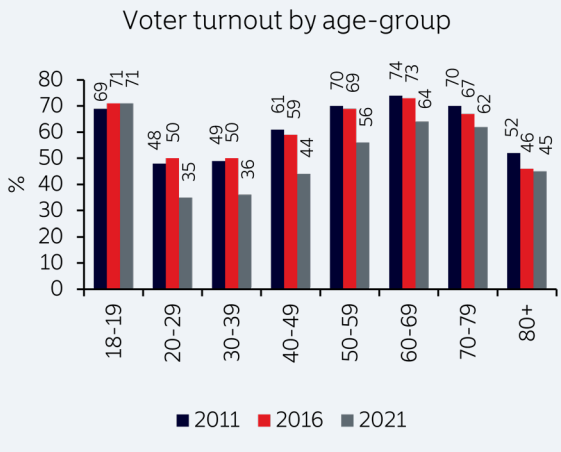
Source: IEC, Momentum Group

Chart 6: 18.9% of registered voters in 2026 are between 18 and 29



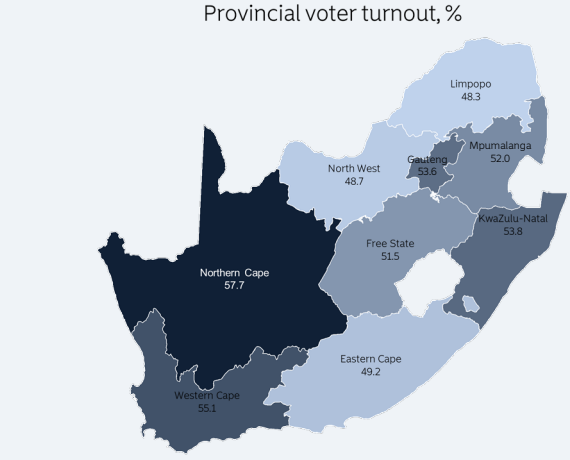
Source: IEC, Momentum Group

Chart 7: Older voters turn registration into participation



Source: IEC, Momentum Group

Chart 8: Participation varied across the country

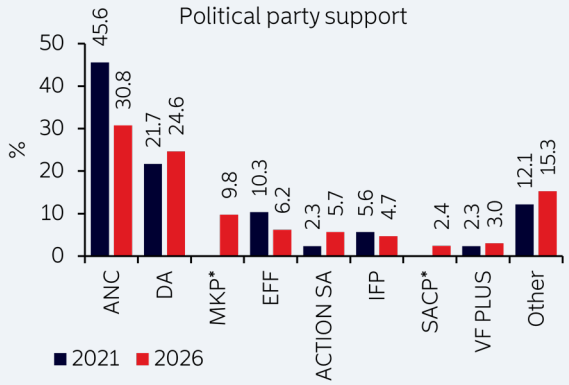


Source: IEC, Momentum Group

How the political map changed

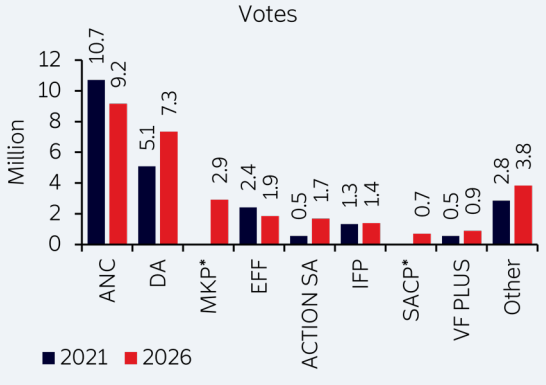
The election reshaped both party support patterns and the prospects for governing without coalition partners. Nationally, the ANC secured 30.8% of the vote, followed by the DA (24.6%) and MKP (9.8%). Relative to 2021, ActionSA recorded the largest percentage point (pp) gain (3.34pp) followed by the DA (2.98pp), while ANC experienced the sharpest decline (14.83pp). MKP and the South African Communist Party (SACP) contested the local government election for the first time in 2026, securing 9.8% and 2.4% of the vote, respectively. Changes in absolute votes reinforced this shift. Of the eight leading parties, only the ANC and the EFF lost votes, declining by 1.5 million and just under 600 000, respectively. The DA gained 2.3 million votes, while the MKP secured 2.9 million votes. ActionSA's support more than tripled to 1.7 million, while total valid votes rose from 23.5 million to 29.8 million, indicating an expansion in the number of votes cast. Provincially, the ANC's declining dominance was widespread. The MKP overtook the ANC in KwaZulu-Natal (KZN) while the DA did so in Gauteng (GP). The ANC also lost its outright majorities in North West (NW), Eastern Cape (EC) and Mpumalanga (MP), though remained the biggest party, and retained its majority in Limpopo (LP). The DA maintained its majority in the Western Cape (WC). These shifts were reflected in council outcomes. In 2021, 143 councils returned outright majorities and 70 were hung, meaning they had no outright majority. In 2026, the number of councils with outright majorities fell to 74, while 138 had no single party with sufficient seats to govern alone. With more councils requiring cooperation between parties, the ability to negotiate durable agreements will be critical to stable administrations, sound budget decisions and effective service delivery.

Chart 9: National municipal party support as a share of total



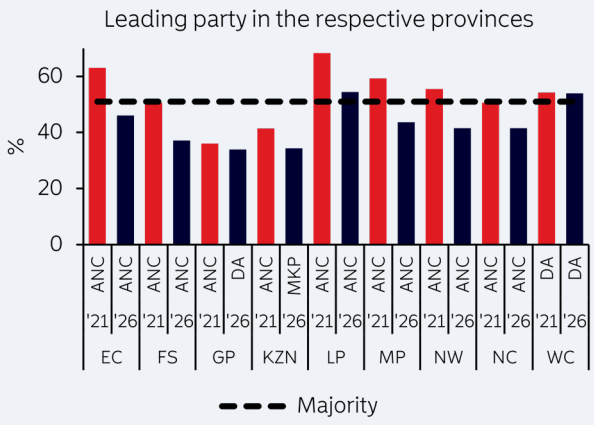
Source: IEC, Momentum Group
** Did not contest in 2021*

Chart 10: National municipal party support in number of votes



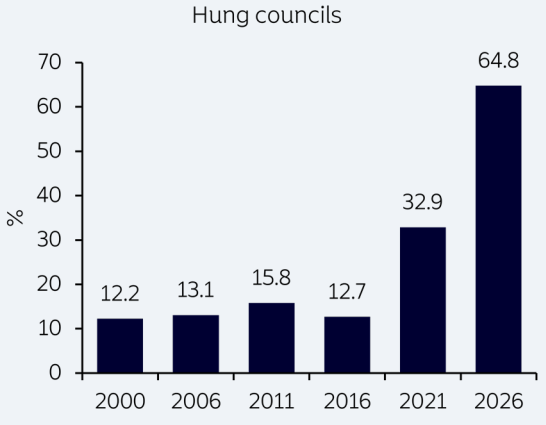
Source: IEC, Momentum Group
** Did not contest in 2021*

Chart 11: Provincial municipal party support



Source: IEC, Momentum Group
FS = Free State

Chart 12: Hung councils over time



Source: IEC, Momentum Group

The eight metros

The eight metros produced markedly different electoral outcomes, reflecting local contests within a changing national political landscape. The DA emerged as the largest party in five metros, up from two in 2021, while the ANC retained its position in only two metros, down from six previously. The MKP emerged as the largest party in eThekwini. An outright majority was secured only by the DA in Cape Town, leaving the remaining seven metros dependent on negotiated support to form administrations.

The results reflect different starting positions across the metros. In Cape Town, the DA retained its dominant position, securing 56.4% of the vote, although this was slightly less than 58.3% recorded in 2021. In Johannesburg, the DA overtook the ANC to become the largest party, increasing its support to 34.8% from 26.1%, while the ANC's share fell to 20.3% from 33.6%. ActionSA maintained a relatively strong position at 16.3%, marginally above its previous 16.1%. A similar shift occurred In Tshwane where the DA increased its support to 34.4% in 2026, from 32.0% in 2021 (overtaking the ANC) whose support fell sharply to 20.2% from 34.6%. ActionSA recorded a significant gain to 22.1% from 8.6%, becoming the second-largest party in the metro. In Ekurhuleni, the DA also overtook the ANC, increasing its support to 30.7%, from 28.7%, while the ANC's share fell to 22.1% from 38.2%. The most notable shift, however, was in eThekwini where MKP emerged as the largest party with 38.3% of the vote. Across the metros, ActionSA recorded the largest percentage-point gain (13.4pp) in Tshwane relative to 2021, while the ANC experienced the steepest decline in eThekwini (25.7pp).

The distribution of seats highlights the challenges of securing stable administrations across the metros. Seven of the eight metropolitan councils fell short of an outright majority, with the largest gaps in Ekurhuleni (47 seats), Johannesburg (45) and Tshwane (34). This means that the leading parties will need to secure support from other parties to obtain a governing majority, increasing the influence of smaller parties in coalition negotiations and the formation of municipal administrations. Cape Town remains the exception, with the DA holding 133 seats against the 118 required for a majority.

Chart 13: Vote share by metro in 2026, %

	Johannesburg	Cape Town	eThekwini	Tshwane	Ekurhuleni	Nelson Mandela	Buffalo City	Mangaung
ANC	20.3	14.0	16.4	20.2	22.1	25.5	41.9	33.9
DA	34.8	56.4	25.5	34.4	30.7	44.2	16.9	33.5
MKP	5.6	0.6	38.3	2.0	7.0	1.2	0.9	0.9
EFF	6.5	3.7	1.6	5.8	6.5	5.6	6.8	8.6
ACTIONSA	16.3	2.8	2.9	22.1	18.5	1.8	1.6	2.7
IFP	2.5	0.1	6.8	0.2	1.2		0.1	0.1
PA	2.0	3.8	0.5	0.7	1.6	3.0	1.7	4.3
VF PLUS	1.8	3.4	0.9	7.6	5.0	2.5	1.3	5.9
OTHER PARTIES	10.3	15.3	7.2	7.2	7.5	16.3	28.8	10.0
Voter turnout	52.8	54.8	51.0	54.4	53.4	52.9	55.7	51.6

Source: IEC, Momentum Group

Chart 14: Vote share by metro in 2021, %

	Johannesburg	Cape Town	eThekwini	Tshwane	Ekurhuleni	Nelson Mandela Bay	Buffalo City	Mangaung
ANC	33.6	18.6	42.1	34.6	38.2	39.4	59.4	50.6
DA	26.1	58.3	26.0	32.0	28.7	39.9	19.5	25.7
MKP								
EFF	10.6	4.1	10.5	10.7	13.5	6.4	12.1	11.3
ACTIONSA	16.1		1.9	8.6	6.6			
IFP	2.4	0.1	7.1	0.2	1.4			
PA	2.9	1.5	0.2	0.5	1.9	1.4	0.3	1.8
VF PLUS	1.3	1.6	0.3	7.9	3.3	1.6	0.5	4.5
OTHER PARTIES	7.0	15.8	12.0	5.5	6.5	11.3	8.2	6.1
Voter turnout	42.6	47.2	41.9	45.0	43.5	45.9	45.2	43.5

Source: IEC, Momentum Group

New mandates with inherited constraints

The election renewed municipal mandates, but administrations will inherit financial and operational constraints that political change alone cannot resolve. The relationship between governance and electoral support appeared strong as voters punished persistent failures.

The governance baseline remained weak. Only 39 of 257 municipalities achieved clean audits in 2024/25, while metropolitan audit outcomes regressed. Although audit quality does not measure service reliability, it provides an indication of the financial management and accountability underpinning delivery. Revenue collection constraints further limited any scope for improvement. Municipalities collected 63.9% of billed revenue in 2025/26, against a budgeted rate of 72.8%. Consumer debt reached R484.5 billion by June 2026, limiting the cash available to maintain infrastructure and fund services. Implementation weaknesses compounded these pressures. Capital expenditure amounted to R65.3 billion, or 77.8% of adjusted budgets, leaving R18.6 billion unspent. Meanwhile, municipalities owed creditors R185.2 billion, including R99.9 billion for bulk electricity, transmitting financial strain to utilities and suppliers.

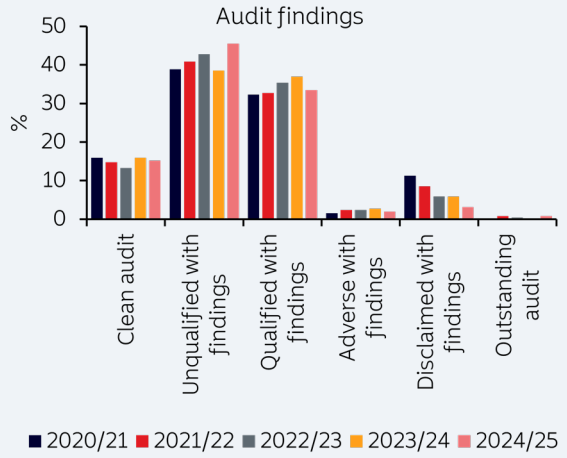
New councils will need to improve revenue collection, align spending with available resources and strengthen project implementation. Stable leadership, reliable service delivery and sustained infrastructure investment will be important in supporting local economic growth.

Chart 15: Uneven governance records across the metros

	2020/21	2024/25	Change
Johannesburg	Unqualified with findings	Qualified with findings	Deteriorated
Cape Town	Unqualified with findings	Unqualified with findings	No change
eThekwini	Unqualified with findings	Unqualified with findings	No change
Tshwane	Unqualified with findings	Qualified with findings	Deteriorated
Ekurhuleni	Clean audit	Qualified with findings	Deteriorated
Nelson Mandela Bay	Qualified with findings	Qualified with findings	No change
Buffalo City	Qualified with findings	Qualified with findings	No change
Mangaung	Unqualified with findings	Qualified with findings	Deteriorated

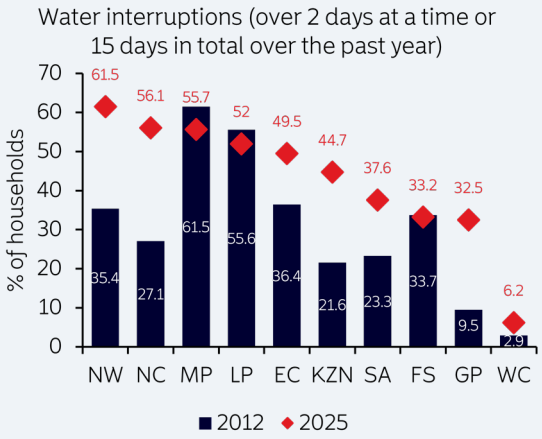
Source: Auditor General of SA (AGSA), Momentum Group

Chart 16: Municipal audit outcomes over time



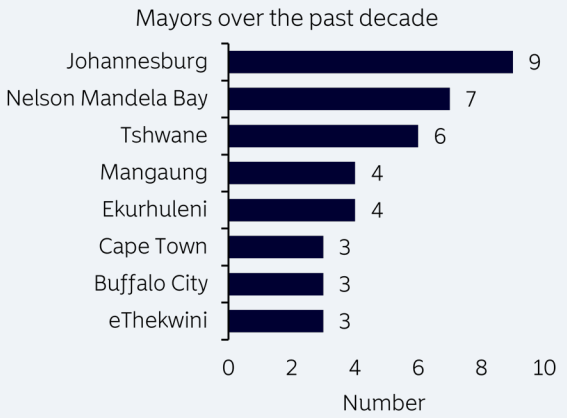
Source: AGSA, Momentum Group

Chart 17: Water interruptions have increased



Source: Stats SA, Momentum Group

Chart 18: Leadership changes disrupt continuity in municipal government



Source: Momentum Group
Excluding acting mayors

After the vote

Voting on 4 November 2026 determined council representation, but the formation of municipal governments requires legal and political steps. The IEC declared the results on 8 November 2026, with elected councillors needing to be gazetted between 10 and 13 November. Metropolitan and local councils must hold their first meetings within 14 days after being declared elected, rather than within 14 days of polling. This timetable does not create a separate deadline for signing coalition agreements. Where no party secured a majority, negotiations will determine support for leadership and council decisions. The largest party has no automatic entitlement to the mayoralty. Councillors elected office-bearers under the prescribed procedures, with executive arrangements dependant on the municipality's governance system. The proposed Municipal Structures Amendment Bill sought mandatory written coalition agreements, their submission to municipal managers and provincial member of the executive councils (MECs), and publication in the Provincial Gazette. It also proposed extending formation periods from 14 to 30 days. These provisions remained proposals at the time of writing and should be distinguished from operative law.

After leadership elections, councils needed to establish oversight arrangements and align priorities with inherited budgets and statutory processes. Legislation requires ward committees within 120 days after the council's election. Political agreements could guide cooperation, but could not override procurement rules, financial legislation or councillors' duties.

Chart 19: Timeline

Voting

2 – 4 November

2 – 3 Nov
Special votes

4 Nov
National voting day

Results

8 – 13 November

8 Nov
Declaration of official, unaudited results and verified turnout

11 Nov
Legal outer limit for announcing the official results

10 – 13 Nov
Council lists gazetted (based on the 2021 timeline)

Governing

8 November – mid December

8 Nov – 1 Dec
Coalition negotiations (finalised within the 14-day period following official results announcement)

16 Nov onwards
Clear-majority councils begin holding first meetings

24 – 27 Nov
Deadline for first council sittings and election of speakers, executive mayors and executive committees

Late Nov – mid Dec
Mayoral committees appointed; budgets and administrations settle into the new year

Source: Citi, IEC, Momentum Group

The focus shifts to governance and delivery

According to the IEC, the conduct of the elections was generally viewed positively. Its Elections Satisfaction Survey found that 90% of respondents regarded the procedures as free and 91% as fair. Satisfaction with IEC services stood at 95%, while 81% expressed trust in the Commission. However, concerns around intimidation, impartiality, inclusive voting and information gaps remain.

The LGE results point to a more competitive and fragmented political landscape, with coalition governments likely to play a greater role in municipal administration. While stronger political competition could improve accountability, greater reliance on coalitions also raises questions about leadership stability and policy continuity.



Against a backdrop of weak municipal finances and service delivery challenges, the ability of new administrations to improve revenue collection, manage expenditure and maintain infrastructure will be critical. Ultimately, the economic benefits will depend on whether these political shifts translate into better governance, stronger municipal finances and an improved environment for investment and employment.

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