

Elections – looks normal, but some significant shifts

At the time of writing 95% of voting stations have reported and 17 million votes counted. The ANC was at 62.5% of the vote, the DA at 22% and the EFF at 6% - taking between them 90% of the vote. It looks like 10 parties will share the remaining 10%.

Agang will just scrape into Parliament with 0.29% of the vote (0.25% gives one a Parliamentary seat).

There are still some votes outstanding which may change the final tally somewhat, but I think it is all over bar the celebrations and the weeping. We should know the final official results by Saturday afternoon.

What has changed?

The ANC has declined from the 65.9% it got 5 years ago. If one takes the long view and look back ten years, it declined from 69.69% in 2004 to 62.5% now. Fifteen years ago in 1999 it got 66.35%. The ANC used to be a two-thirds party, it no longer is. A significant development.

The DA has grown from 16.7% in 2009 to 22% now. Taking the long view, the DA has grown from 14.1% ten years ago to 22% now (for both elections we include Patricia de Lille's Independent Democrats with whom the DA merged after 2009 as part of the DA count – apples with apples). Fifteen years ago in 1999 they got less than 10% (9.56%). They can grow further.

COPE is the big loser and has been replaced as the number 3 party in Parliament by the EFF. COPE will go from 30 MPs to 3. The wages of sin – fighting leaders betraying the confidence of voters.

The rise of the EFF from literally nowhere to more than 6% of the vote was a big change. Many COPE voters probably went back to the ANC, yet the ANC's share of the vote still declined, courtesy the EFF. Its rise may also explain why the two old stalwarts from the left, the PAC and Azapo, did so poorly with Azapo not even making it back into Parliament. The EFF's rise will see real left wing arguments being articulated in parliament and in the broader body politic. That will take some getting used to.

The small parties remained at 10 but their share of the vote declined from about 16% to less than 10%. Increasingly it is about the Big 3 – ANC, DA and (for now at least) the EFF. Perhaps we will see more consolidation over the next few years.

It starts in the provinces and metros

In the Western Cape the DA after 2009 could only rule in coalition with the ID. Now they got 57%. In Gauteng the ANC went from 64% to less than 54% - a swing of more than 10%. Gauteng is the country's biggest province – already in this election 25% of all voters were registered there. That makes a 10% swing significant. A huge part of the swing seems to have occurred in the two metros, Johannesburg and Tshwane. Both the province and two metros are now within reach of an opposition coalition. In two years' time, with the 2016 local government elections, these two metros will be fiercely contested.

Looking back it is clear that competitive politics start with the metros and provinces, not at the national level. It proves the correctness of Helen Zille's decision a few years ago to focus on local and provincial rather than national (she was criticised for that at the time).

KZN readers will be interested to note that the Inkatha Freedom Party and the off-shoot party that broke away from it, the National Freedom Party, scored about 4% between them – almost the 4.55% the IFP got 5 years ago. Clearly that traditional support is holding, but has now been split between two parties (helping to keep the number of small parties in parliament at 10).

So What?

Paradoxically, the clear winner in this election is Pres. Zuma. He did preside over the process of the ANC changing from a two-thirds party to something less, yet he is stronger. How come? Well, he and the ANC survived intense media and political attacks (created partly through their own behaviour) during which a much reduced ANC with less than 60% became the benchmarks for opposition success. At 63% and the ANC not that much reduced he, once again, survives stronger. Forget the notion that he will leave after two or three years, he will in all likelihood finish his 5 year term.

The EFF is a clear winner, but – again paradoxically – it has also been cut down to size. The media, chattering classes and twitterati have always had a fascination with Mr Malema. Various people predicted that he will get 15% to 20% of the vote. On one website a wag even had 40%!! At 6% the voters are not nearly as enthusiastic. The EFF will continue to get a lot of media attention, and no doubt they will get under the ANC's skin. There will be many raucous debates, but their impact in Parliamentary work and on policy will be limited. A week is a long time in politics, not to mention five years. But if a workers' party of the left emerges in the next year or two, it could make for interesting fights between such a party and the EFF in 2019.

The DA did well but they are probably disappointed that they have not done better in the Northern Cape. They were probably also hoping for 25% nationally, not just 22%. They polled slightly less than the 24% in the 2011 local govt elections – but then, local elections traditionally go somewhat against the government of the day. Nevertheless, the party has travelled a noticeable journey from less than 10% fifteen years ago with control of no province or metro. Perhaps, if their campaign was less negative and more focused on what they offer, they might have done better. Politics is not just about saying how bad, very bad, the other guy is. It is also about what you stand for. Could it be US consultants that brought in that particularly American campaign characteristic of negative campaigning...?

So what policies now?

Two narratives dominate.

The first is that the ANC will link up with the EFF, muster two-thirds and change the Constitution. There is one strong argument against this – track record. For the last fifteen years the ANC could easily have mustered two-thirds and changed the Constitution on matters that would have been popular with the general public like bringing back the death penalty, outlawing gay marriages, disallowing abortions or even changing the property clause. They did not. The Constitution is a proud achievement and with every year that passes by it gets stronger, not weaker. We have seen

how violently the body politic reacted when laws were proposed that infringed the Constitution. It is not just for changing it.

The second narrative is that the ANC will now swing left in order to prevent further growth in the EFF. Again, there is the issue of a track record. Remember at the time of Polokwane in 2007 when Mr Zuma was elected leader of the ANC and we were also promised “a lurch to the left”? It is now six years since Polokwane and there is no “lurch to the left”. We were entertained to the same thinking in the run up to the ANC Conference in Mangaung in 2012 – the so-called “Lula moment” pleaded for by Cosatu. Now both NUMSA and Mr Zwelenzima Vavi want to leave the ANC fold and form a workers’ party because the ANC did not move left. Judging by its track record – what it did and did not do in power – the truth is simply that the ANC is not a party of the left. It is much more of a social-democratic party; not liberal-democratic like the DA; and also not left like the EFF, which is closer to the real thing.

I think rather than a swing to the left, the opposite will happen. The EFF will articulate left positions that the ANC will be forced to repudiate. And by repudiating it, the ANC will articulate a more middle-of-the-road position. It has already happened on both Zimbabwe and land reform where Julius took positions that were flatly repudiated by ANC leaders. The contestation will not be about occupying the left, it will be about differentiating left and middle.

And that might well be the biggest winner of this election: a clearer demarcation between left, middle and right. The easy stereotyping of the ANC as “left” and “socialist” with the DA being labelled as “reactionary” and “counter revolutionary” may very well pass and the debate become focused on more substantive “left”, “right” and “middle” positions. That would be a great step forward.