

Elections ... Slow shuffle to the middle?

The State of the Nation speech was middle of the road and noticeable for what it did not say; the Budget was non-populist; could the May elections continue the trend? Let's start with the numbers.

Possible numbers

DA leader Helen Zille said in an interview that she expects the ANC to get 60% of the vote. That tallies with an IPSOS poll and the general consensus that suggests 60% to 62% for the ANC. It is down from the nearly 66% the party got in 2009 and nearly 70% in 2004. It is, however, in line with what it got in the local government elections of 2011.

From DA leaders one gets the impression that they would be very happy with 25% of the vote – considerably more than they got in the 2009 election (16.7%) and marginally more than they got in the local government elections of 2011 (24.1%). The aforementioned IPSOS poll puts the DA numbers at 19%, but that strikes me as too low, given what they got in 2011. I am happy to speculate on about 22% to 23% for the DA.

That locks up 82% of the vote. Where will the other 18% go?

The third largest party will probably be the EFF. I say "probably" because we have very little hard data to go on. The same IPSOS poll gives the EFF 5%. The EFF is the darling of the media, the chattering classes and the twitterati, but it is clearly not equally popular amongst the voters. Uncertainties like Julius Malema's court cases, how much money the EFF can raise for its campaign and what will happen once the ANC machine comes into action all put question marks behind that 5%.

However, if we assume the EFF gets that 5%, the three biggest parties would have locked up 88% of the vote between them.

That will leave the remaining 12% for the more than 100 other political parties contesting this election. In reality, the vote will be shared between the other 10 parties, besides the ANC and DA, currently represented in Parliament (most are likely to return to parliament even if with less votes), as well as new parties like Agang and the National Freedom Party who might just squeeze into Parliament.

We will then end up with 3 big parties (ANC, DA and EFF) in Parliament and another twelve or so much smaller ones.

Cautionary

All of this is subject to some health warnings. First, the old saying that "a week in politics is a very long time". An enormous amount can still happen in the two months before Election Day. Secondly, 10% of voters say they do not know who they will vote for or do not want to disclose their preferences. If they all break for the same party it will alter the final numbers from what I speculate here. Thirdly, will there be a big stayaway vote or will we see a high turnout?

Surprises

Should the opposition parties poll more than the 23%, 5% and 12% I speculate here, the ANC would dip below 60% of the vote. That would be a proverbial kick in the pants.

The other surprise could be if the ANC dips below 50% in Gauteng. The IPSOS poll suggests 45% for the ANC in Gauteng and this last weekend City Press reported that in-house ANC polls suggest the same. The biggest question then will be with whom the ANC will go into a coalition.

I suspect they will try and govern as a minority government and not form a coalition with anybody. That will put huge pressure on opposition parties to make a conscious choice every time an important issue is before the provincial legislature, e.g. the budget or ... e-tolls!

Elephant in the room

The absence of the real, hard left is a most notable feature of this election.

The trade union NUMSA has already broken with the ANC and is in a protracted divorce from Cosatu. It has declared its intention to investigate the formation of a real socialist party. Mr Vavi, suspended secretary-general of Cosatu, is also in a protracted process of separation from Cosatu and will probably end up in some leading role in a real party of the left.

However, not much of that is going to happen in this election. We will have to wait for the local government elections of 2016 and to see some electoral action from the left.

The three Ps: Politics, Plan and Personalities

At the Polokwane Conference of the ANC in 2007 we were promised "a lurch to the left" by the Vavis and Numsas of this world. At the time of the Mangaung Conference in 2012 they were still hopeful, and spoke of a "Lula moment" – shorthand for more left-orientated policies. The swing to the left has clearly not happened. It is the main reason why both NUMSA and Mr Vavi are on their way out of the ANC.

That could be Mr Zuma's biggest contribution to political life the last five years – he held the left at bay (although they supported him at Polokwane against Mr Mbeki) and in fact is crushing them out of the ANC. Of course, this probably has more to do with political tensions between the ANC/Mr Zuma and the Malemas and Vavis of this world than with ideological preferences, but the end result is the same. The left has been weakened inside the ANC and the Alliance.

So what policies will the post-election ANC follow? The outlines are clear from the State of the nation and budget speeches. The National Development Plan (NDP) has gained remarkable political support in and outside the ANC. It will in all probability become more entrenched over the next five years. More and more budget allocations and legislation – not all of it, but most – will be in line with the NDP. In that sense NUMSA and the others on the left are right if they suspect the ANC will inch towards "the right" or middle of our politics. The NDP has strong transformative proposals so it does not mean no change, but it is certainly not change to the left.

Some suggest the ANC may swing left with its policies to counter the EFF. On the contrary, the acrimony between them will be so intense, the EFF will help inch the ANC to the middle.

So if the left is on the wane inside the ANC, and the National Development Plan is centre stage, the remaining question is who will drive implementation? And that takes us straight to Personalities. What changes will there be in cabinet, who will occupy key ministries, will the cabinet in fact be reconfigured? Publication of the ANC's candidate lists will cast some light on this. For more clarity on personalities we will have to wait until after the election when the new cabinet is announced.

So What?

- The ANC is likely to continue its journey from a two-thirds to a 60% party.
- The DA will continue its journey of becoming a bigger party (25%) and consolidating its position to the right of the ANC.
- The left has been cut down inside the ANC and will develop its base outside Parliament preparing for 2016 and 2019.
- If all this happens the election and its outcome promises to be very boring indeed.
- The NDP will become the dominant policy document of the next government and whilst that will mean a lot of transformative change, it will certainly not be a leftward drift – on the contrary.
- All we now need are a few credible personalities that can drive implementation, including higher economic growth.