

# EXCELLERATE SECURITY

WHERE **BETTER** BEGINS

INTELLIGENCE REPORT

## Security Risks Surrounding the 2026 South African Municipal Elections

Contextual Assessment · Situation Report · All-Hazards Risk Assessment



Effective date  
1 September 2026



INFORMED ASSESSMENT.  
RESPONSIBLE DECISIONS.  
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| Field              | Detail                                                                                                                                                                                                                                                                      |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Effective date     | 1 September 2026                                                                                                                                                                                                                                                            |
| Event              | 2026 South African Local Government Elections. Polling day Wednesday 4 November 2026, 65 days from the effective date of this report.                                                                                                                                       |
| Reporting period   | Primary focus 1 June to 31 August 2026. Longer-run data used for baselines.                                                                                                                                                                                                 |
| Analytical scope   | All-hazards security. Targeted political violence, violence against investigators, public order and unrest, organised crime and extortion, state security capability, cyber and information threats, electoral integrity.                                                   |
| Geographic scope   | National. Nine provinces, 257 municipalities.                                                                                                                                                                                                                               |
| Overall assessment | HIGH and deteriorating. Targeted assassination of candidates and councillors is the dominant threat and is running at roughly one incident every ten days nationally.                                                                                                       |
| Sourcing           | Open source only. Government, Presidency and IEC statements, SAPS quarterly crime statistics and NATJOINTS briefings, Parliamentary Monitoring Group, ISS, ACLED, GI-TOC, Afrobarometer, Human Rights Watch, SALGA, mainstream, regional and trade media, party statements. |
| Handling           | Open source. No classified or protected information. Distribute per your own internal policy.                                                                                                                                                                               |

**Analytical caveat.** This assessment is built entirely from open sources. Judgements carry explicit confidence levels, and contested, unverified or speculative claims are flagged where they appear. Absence of reporting is not evidence of absence of risk. Under-reporting of intimidation and non-fatal electoral violence in rural municipalities is a known and material collection gap, and the incident picture below is therefore biased towards metros and well-covered towns.

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## 1. EXECUTIVE SUMMARY

South Africa votes on 4 November across 257 municipalities. The dominant security risk in this cycle is the targeted killing of individual candidates and councillors, and it is well underway. Research recorded through late August counts at least 23 suspected political assassination incidents resulting in 26 deaths across five provinces since the start of 2026, with councillors and candidates increasingly the target. That is roughly one incident every ten days. **The overall risk assessment is HIGH and the direction of travel is negative.**

Municipal office is where South African politics converts most directly into money. A ward councillor sits across procurement, housing and indigent lists, local appointments and ward committee patronage, and in a thin local economy the council is the largest buyer and employer in the district. That is why 105 of the 186 politically motivated assassinations recorded in South African election years since 2000, some 56 per cent, fell inside municipal cycles. The violence tracks candidate selection within parties. An aspirant who loses a nomination or is placed too low on a list has an instrumental interest in the removal of the person ahead of them, either to force a by-election or to move up.

The risk calendar is now live rather than approaching. Nominations closed at 17:00 on 28 August and final candidate lists become public on 16 September. The fortnight in between is the sharpest phase of the cycle, because those who lost internal contests know the outcome while the public does not. The ANC has extended that exposure by deferring its metro mayoral selection a second time, publishing a pool of 42 names across the eight metros on 22 August with the final decision held to national officials in September. Forty-two aspirants competing for eight posts, decided centrally and still unresolved, is a reliable generator of factional grievance.

Knysna is the clearest illustration of what the threat looks like in practice. Between 19 and 26 August the Western Cape town lost serving Ward 8 councillor and former executive mayor Aubrey Tsengwa, former Ward 7 councillor Mandla Matiwane, local taxi forum secretary Mandla Tyololo, and a police captain deployed to investigate the first three killings. Four suspects are in custody. The cluster confirms the taxi-sector nexus, establishes the Western Cape as a primary hotspot rather than a secondary one, and demonstrates a willingness to engage the state's own investigators. Treat protective and investigative work in active clusters as a hostile environment.

KwaZulu-Natal remains the highest-intensity province. Premier Thamsanqa Ntuli has confirmed that at least 18 councillors have been assassinated there since the 2021 local government elections, with eThekweni accounting for five, the highest of any municipality in the country. That is roughly one councillor killed every three to four months across a normal council term, before an election cycle is added.

The state's ability to investigate political murder is compromised at the worst possible moment. The Political Killings Task Team was ordered disbanded, had its dockets returned, and is working current cases without settled institutional standing. The National Commissioner is suspended and facing criminal charges alongside twelve other officers, and the police ministry is also under acting leadership.

Crime Intelligence is under investigation for an alleged off-the-books operation, and its own head has testified that an organised crime network with international links has penetrated the political sphere while running tender fraud, extortion, kidnapping and contract killing. The Madlanga Commission's final report has been extended to 16 November, twelve days after polling, so none of this resolves before the vote.

Cabinet condemned the killings on 28 August, commended the speed of the Knysna arrests, and explicitly declined to intervene, with the Minister in the Presidency stating that law enforcement should be trusted to bring the situation under control. No dedicated candidate protection programme and no new task team have been announced. Existing structures carry the campaign.

**Three hazards run alongside the assassination threat.**

- **Organised anti-migrant mobilisation** has set 30 September as a second national day of action, five weeks before polling, with organisers claiming greater capacity than the 30 June action that produced roughly 150 demonstrations in a month with violence at about a quarter of them. Service delivery grievance is being aimed at the persons and property of local representatives, against an Afrobarometer finding that only 17 per cent of South Africans believe councillors listen to them.
- **Criminal syndicate with asserted party links** are positioning for the post-election municipal spend – with testimony presented to the Madlanga Commission to date pointing to the existence of deeply entrenched criminal networks operating across the public and private sectors.
- **Hyper-local disinformation generated with AI tools** remains the IEC’s own stated integrity concern. The wider threat environment is significant: INTERPOL estimates that AI now enables 55% of reported cybercrime across Africa, while cybercrime losses more than doubled from US\$192 million in 2024 to US\$484 million in 2025. In South Africa, more than a third of fraud incidents reportedly involve generative AI, including increasingly sophisticated manipulation of documents, images and video.

The second peak falls after polling day. More than 66 councils were already hung, the ANC is polling below 40 per cent, and most metros will be settled in negotiation rather than at the ballot box. The window from declaration of results to the installation of mayors and executives, November to January, carries elevated risk of council chamber disorder, mobilised protest by excluded parties, and coercion of the individual councillors whose votes decide a mayoralty. Whilst a repeat of the July 2021 unrest is unlikely, it cannot be discounted because that week killed more than 300 people and cost around R50 billion, and because most of the people who organised it were never convicted.

The picture is not uniformly bleak, and the electoral machinery in particular has performed. The final voters’ roll was certified on 26 August at roughly 29 million registered voters, with about two million added across the June and August registration weekends and around 80 per cent of new registrants aged between 16 and 29. Nominations closed without systems failure.

Treasury has topped up election funding and Parliament is satisfied with IEC readiness. The Commission has moved from advisory statements to draft binding rules requiring parties to label AI-generated campaign material and correct false claims on their own platforms.

Quarterly crime statistics released on 28 August show murder down 5.9 per cent nationally, which makes the rise in political killings a movement against the national trend rather than part of it. The system is under strain, but it is working.

## 2. CONTEXTUAL ASSESSMENT

### 2.1 What is being contested

Local government is the third sphere of the South African state and the one that voters deal with daily. It runs water reticulation, sanitation, refuse removal, local roads, storm water, electricity distribution in most areas, municipal health, building control and by-law enforcement. Councils serve five-year terms, the current terms expire in late 2026, and the constitutional window for the poll therefore runs from 2 November 2026 to 30 January 2027. The Minister of Cooperative Governance and Traditional Affairs proclaimed 4 November.

There are 257 municipalities: eight metropolitan councils covering the major cities, 205 local municipalities, and 44 district municipalities sitting above the locals and handling shared functions. Voting uses a mixed system. Half the seats in a metro or local council go to ward councillors elected first past the post, and half are filled proportionally from party lists. Depending on where a voter lives they receive two or three ballots, covering the ward and the proportional and district components. That mix is why a single ward can decide who governs a city, and why a single ward is worth fighting for.

Turnout at local elections runs well below national elections, and the contest is fought street by street on refuse collection, water outages, potholes and billing rather than on national policy.

### 2.2 Why municipal elections are the violent ones

The structural driver is that municipal office converts most directly into economic control. Where the formal economy is thin, the council is the largest single economic actor in the district, and the councillor is the gatekeeper. That fact, rather than ideological polarisation, explains why municipal cycles produce disproportionate lethal violence.

The empirical signature is clear. Research by the Global Initiative Against Transnational Organized Crime recorded 186 politically motivated assassinations across South African election years since 2000, of which 105 fell during municipal election cycles. Violence clusters around the contest inside the dominant party for access to a ward rather than around competition between parties. KwaZulu-Natal carries the largest share, with Mpumalanga, the Eastern Cape, North West, Gauteng and now the Western Cape also affected.

The mechanism most frequently documented is candidate-selection violence, and it makes the risk sharply time-bound. It concentrates around nomination processes, list submission, and the immediate post-election allocation of executive positions. All three of those fall inside the next five months.

### 2.3 A structurally different electoral map

These are the first municipal elections since the 2024 general election broke single-party dominance. The ANC took just over 40 per cent nationally, the DA 22 per cent, the MK Party 15 per cent and the EFF 9 per cent, producing a ten-party Government of National Unity. Polling since has shown further ANC decline, and more than 66 local councils were already hung going into this cycle.

Three consequences follow for security planning. Far more councils are genuinely winnable, which raises the value of a single ward and the incentive to contest it violently. Outcomes in most metros will be determined by post-election negotiation, which shifts risk into November to January. And small parties holding a handful of seats become kingmakers, which makes individual councillors from minor parties disproportionately valuable and therefore disproportionately exposed to both inducement and intimidation.

Party-specific stress compounds this. The MK Party is attempting to convert a 2024 protest surge into municipal organisation while managing leadership disorder in KwaZulu-Natal, its core province, and named mayoral candidates in six metros on 29 August. The DA has named candidates in seven of the eight metros, including Helen Zille in Johannesburg, Cilliers Brink in Tshwane and Haniff Hoosen in eThekweni. The ANC

has published a 42-name pool and deferred the decision, which resolves nothing and prolongs the internal contest into September.

#### **2.4 A degraded and contested security apparatus**

This cycle is being policed by an institution in the middle of the most serious integrity crisis of its post-1994 history. Following KwaZulu-Natal Provincial Commissioner Nhlanhla Mkhwanazi's July 2025 allegations, the Madlanga Commission has delivered two interim reports, on 17 December 2025 and 29 May 2026. Reporting indicates that thirteen police officers, including the National Commissioner, face criminal charges, with a further fifteen subject to disciplinary proceedings. The National Commissioner is on precautionary suspension, the service is led by acting national commissioner Puleng Dimphe, and the police ministry is under acting minister Firoz Cachalia. The Commission has recommended disciplinary and criminal investigation of senior figures and directed investigation of a suspected off-the-books operation inside Crime Intelligence.

Testimony from the head of Crime Intelligence described an organised crime network with international links that had penetrated the political sphere while expanding into tender fraud, extortion, kidnapping and contract killing. Taken at face value, that describes the exact capability set required to conduct election-period assassinations, and locates part of it inside or adjacent to the state.

The most operationally significant single issue is the Political Killings Task Team. Established in 2018 with a KwaZulu-Natal focus, it was ordered disbanded by the then Minister of Police, and dockets were subsequently returned to it by the National Commissioner, leaving it in partial operation. The Commission heard evidence that the attempted disbandment could have affected the municipal elections. The unit is investigating current cases, including the Klaarwater killing, so it retains a function, and it does so without settled institutional standing. Case continuity, institutional memory and informant networks in political murder investigations are difficult to rebuild.

The Commission's final report deadline has been extended from 31 August to 16 November 2026, with an evidence deadline of 2 October. Police leadership questions therefore stay open through the entire campaign and into coalition formation, and any findings touching on election-period conduct will land while councils are being constituted.

Capacity is a separate constraint from integrity. More than 26,000 voting stations require policing on 4 November, and reporting has referenced an acknowledged SAPS personnel shortfall of roughly 6,000 officers. Sustaining a heavy deployment posture across a protest cycle running to year end and then surging for polling day is a real resourcing problem.

#### **2.5 The grievance and legitimacy substrate**

The election is being contested against widely acknowledged municipal failure in water and sanitation, refuse collection, roads, billing and audit outcomes. Afrobarometer reporting in June 2026 found that only 17 per cent of South Africans believe local councillors frequently listen to constituents, with poorer respondents reporting their views ignored around 67 per cent of the time. SALGA's Municipal Violence Incident Reporting System records more than 400 incidents against municipalities and their officeholders between 2000 and 2026, spanning threats, property damage, assault and death.

Much of what is labelled service delivery protest is better read as a legitimacy protest against local political authority. That distinction matters for prediction. Grievance-driven crowds in this cycle are more likely to target the symbols and persons of local government, as at Lesedi where protests involved loss of life and the torching of the executive mayor's property, than to target polling infrastructure.

A second mechanism has appeared in August. In Msunduzi, municipal workers have run a protracted strike over job descriptions, overtime and standby allowances, leaving refuse uncollected in the central business district for weeks. Protesters set rubbish alight and police responded with tear gas and rubber bullets. Here

the disruption originates inside the municipality rather than in the community, and it degrades the visible performance of an incumbent administration in a contested city during campaign season.

## 2.6 The anti-migrant vector

An organised anti-migrant movement has become an independent variable in this election. Campaigns under the March and March banner and allied formations set a 30 June deadline for undocumented foreign nationals to leave the country. ACLED assessed roughly 100 demonstrations against illegal migration on 30 June and at least 150 across the month, more than the total recorded over the preceding twelve months, with some gatherings exceeding 15,000 participants including traditional Zulu regiments and MK Party members. Approximately a quarter of June demonstrations involved violence, generally looting or vandalism of businesses believed to be foreign-owned.

The movement has since sharpened. On 17 August it picketed the 46th SADC Summit of Heads of State and Government in Durban under the theme "It's time to fetch your people", warning regional leaders to prepare for mass deportation, and declared 30 September as a second national day of action which it describes as structurally better resourced than 30 June. Operation Dudula has demonstrated jointly with it in Durban and has continued to obstruct migrant access to health facilities notwithstanding a November 2025 South Gauteng High Court interdict. Human Rights Watch reported new waves of xenophobic attacks in May 2026.

Two implications follow. Court orders alone have not stopped vigilante enforcement, so containment depends on police willingness to act. And anti-migrant sentiment is concentrated in KwaZulu-Natal, Gauteng, Mpumalanga and Limpopo, the same provinces where municipal control is most contested, which creates an incentive for candidates to compete on hostility to migrants rather than on administrative competence, and a corresponding risk that campaign rhetoric translates into street-level violence against a vulnerable minority and their businesses.

## 3. SITUATION REPORT AS AT 31 AUGUST 2026

### 3.1 Electoral status and timetable

| Date or status        | Detail                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Polling day           | Wednesday 4 November 2026, proclaimed by the Minister of Cooperative Governance and Traditional Affairs. The 89-day electoral timetable is running.                                                                                                                                                                                                                                                                                                                                |
| 20 and 21 June 2026   | First national registration weekend. 2.9 million registration transactions. 785,078 transactions from the 16 to 29 cohort and 477,174 new registrations, about 80 per cent of them aged 16 to 29, 59 per cent of youth registrants female. Provincial share of transactions: KwaZulu-Natal 691k (23 per cent), Eastern Cape 534k (18 per cent), Gauteng 502k (17 per cent), Limpopo 336k, Western Cape 235k, Mpumalanga 212k, North West 202k, Free State 145k, Northern Cape 83k. |
| 1 and 2 August 2026   | Final voting-station-based registration weekend. Roughly two million voters added across the two weekends.                                                                                                                                                                                                                                                                                                                                                                         |
| 11 to 18 August 2026  | Provisional voters' roll open for inspection and objection. Completed without reported incident.                                                                                                                                                                                                                                                                                                                                                                                   |
| 26 August 2026        | Final voters' roll certified by the Chief Electoral Officer at approximately 29 million registered voters.                                                                                                                                                                                                                                                                                                                                                                         |
| 28 August 2026, 17:00 | Candidate nominations closed. The IEC enforced the deadline strictly. This opened the highest-risk window of the campaign.                                                                                                                                                                                                                                                                                                                                                         |
| 16 September 2026     | Final candidate lists to be published. Internal disputes become public and litigable.                                                                                                                                                                                                                                                                                                                                                                                              |

| Date or status                | Detail                                                                                                                                                                                                                                 |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4 November 2026               | Polling across 257 municipalities, with more than 26,000 voting stations to be policed. Coincides with the matric examination period and the day is to be a public holiday to limit disruption where schools serve as voting stations. |
| November 2026 to January 2027 | Results declaration, council constitution, election of mayors and speakers, coalition formation. Second peak risk window.                                                                                                              |

### 3.2 Security incident picture

The pre-election period has produced sustained lethal targeted violence, concentrated around the June registration weekend and escalating through August. Research recorded through late August counts at least 23 suspected political assassination incidents resulting in 26 deaths across five provinces since the start of 2026. That figure supersedes the narrower count of seven party-linked victims given by the acting National Commissioner on 7 August, which reflected confirmed cases under active investigation rather than the full incidence.

#### Principal incidents

- Registration weekend, 20 and 21 June. Four politically affiliated individuals killed across three provinces. SALGA issued an urgent call for intervention and ActionSA recorded alarm at the killing of councillors and candidates during the weekend.
- 6 August, eThekweni. ANC Ward 17 councillor Sibusiso "Khekhe" Khwela shot dead at his constituency office in Klaarwater by an assailant who approached posing as a member of the public seeking assistance. Motive not established. The Political Killings Task Team was assigned.
- 19 August, Knysna. Serving Ward 8 councillor and former executive mayor Aubrey Tsengwa shot dead with multiple gunshot wounds to the head and upper body. He had served as executive mayor from August 2022 to February 2025.
- 20 August, Knysna. Former Ward 7 councillor Mandla Matiwane and local taxi forum secretary Mandla Tyololo shot dead by a lone gunman.
- 26 August, Knysna. A 50-year-old police captain attached to the provincial tactical response team, deployed as part of the murder investigations, killed in a shoot-out during a firearms operation at the Sewende Laan informal settlement. The suspect was also killed and two firearms were recovered.
- Four suspects are in custody in the Knysna matter and three appeared in the Knysna Magistrate's Court, remanded pending formal bail application. The Western Cape Serious Violent Crime Unit leads, supported by crime intelligence, local police, a combat team and the drone unit.
- Provincial baseline. KwaZulu-Natal Premier Thamsanqa Ntuli confirmed on 7 August that at least 18 councillors have been assassinated in the province since the 2021 local government elections, with eThekweni recording five, the highest of any municipality.

#### Intra-party and public order

- Nomination friction is visible and public. Street protests over ward candidate selection in Khayelitsha and Samora Machel Ward 33 in the Western Cape, reported disputes in several KwaZulu-Natal wards, and a formal challenge from Johannesburg ANC regional office bearers over mayoral nomination process. The ANC Secretary-General has instructed structures to respect community-preferred candidates and warned that manipulation may result in expulsion.
- The ANC published a 42-name mayoral pool for the eight metros on 22 August instead of naming candidates, deferring final selection to national officials in September. Johannesburg contenders include Frank Chikane, incumbent mayor Dada Morero and deputy mayor Loyiso Masuku. The eThekweni list includes incumbent Cyril Xaba and former premier Nomusa Dube-Ncube.

- Violent service delivery protests in Lesedi Local Municipality involved loss of life and the torching of the executive mayor's property. Between April and May, March and March demonstrations in Pretoria, Johannesburg and Durban turned violent and in some instances fatal.
- Municipal labour disruption in Msunduzi has left refuse uncollected for weeks, with rubbish set alight and police responding with tear gas and rubber bullets.
- Anti-migrant activity is at elevated tempo with a declared national day of action on 30 September.

### **National crime context**

Quarterly statistics for April to June 2026, released on 28 August by acting Minister of Police Firoz Cachalia, show murder down 5.9 per cent from 5,770 to 5,427 cases, robbery with aggravating circumstances down 14.7 per cent and hijackings down 18.2 per cent. Attempted murder rose 8.7 per cent, assault with intent to cause grievous bodily harm 2.5 per cent and common assault 2 per cent. Contact crime overall fell 2.3 per cent. Political killings were flagged as a persistent challenge alongside gang murder and organised crime. Political violence is therefore moving against the national trend, which strengthens the case that it is driven by the election cycle rather than by general criminality. The rise in attempted murder alongside falling completed murder is consistent with more shooting incidents rather than fewer.

### **3.3 State security posture**

- NATJOINTS has stood up an elections priority committee co-chaired with the IEC and activated national joint operational and planning centres. A five-pillar approach has been described, with intelligence collection and analysis as the first pillar, supported by visible policing, protection of election infrastructure, rapid response capability and crowd management.
- Deployment is to be intelligence-led and station-specific. The IEC has worked with security agencies to assign a risk profile and security categorisation to each voting district, with personnel allocated accordingly.
- Public messaging is deliberately deterrent. NATJOINTS and the acting National Commissioner have warned that those planning politically motivated attacks or assassinations will face arrest, prosecution and lengthy custodial sentences. Multi-disciplinary operations are running in all provinces.
- Cabinet condemned the killings on 28 August and commended the swift identification of perpetrators in Knysna. The Minister in the Presidency stated that it would be wrong for the executive to intervene and that law enforcement should be trusted. No dedicated candidate protection programme or new task team has been announced.
- Assessment. The coordination architecture is sound and the Knysna arrests were fast, which is a genuine performance indicator rather than a talking point. The gap is between deterrent messaging and demonstrated conviction rates, in an environment where the leadership of both the police service and the police ministry is in acting hands and the investigating institution is itself under commission scrutiny.

### **3.4 IEC readiness**

- The Commission has told Parliament that its systems are ready to deliver the 4 November poll within the allocated budget, and both SCOPA and the Standing Committee on Appropriations have expressed satisfaction with readiness and allocation.
- Funding. Approximately R1.116 billion was allocated for the local government elections, with an additional R1.1 billion secured from National Treasury. The Commission had earlier flagged a shortfall of roughly R1.65 billion and warned that late availability of funds could compress procurement timelines for items including ballot printing.
- Delivery to date has been clean. The roll was certified on schedule on 26 August and nominations closed on schedule on 28 August without reported systems failure.

- Integrity measures include zero-rated direct-to-citizen verification tools for ward and registration status, rapid-response pathways linking community radio and youth networks to fact-checking hubs, and draft regulations published on 30 June that would require parties and candidates to label AI-generated campaign material, correct false election claims and take responsibility for misinformation on their own platforms.
- The Commission's November 2025 statement that it saw no political violence hotspots has been overtaken by events and should be treated as fully superseded.

## 4. EMERGING THEMES

Themes appearing consistently across three or more independent sources.

| Theme                                           | Description                                                                                                                                                                                                                      | Analytic weight                                                                     |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Violence is intra-party and instrumental        | The dominant lethal threat is contestation inside parties over access to wards and PR list positions. Consistent across GI-TOC, ISS, SALGA and reported nomination disputes in the Western Cape, KwaZulu-Natal and Johannesburg. | Consensus view. High confidence.                                                    |
| Geographic broadening                           | 23 incidents and 26 deaths across five provinces. KwaZulu-Natal remains highest intensity at 18 councillor assassinations since 2021, and the Western Cape has moved from periphery to primary hotspot.                          | Established. High confidence.                                                       |
| Violence against the investigating state        | A police captain investigating the Knysna killings was shot dead on 26 August. New in this cycle and not present in the 2021 pattern.                                                                                            | Emerging. High confidence on the event, medium on whether it recurs.                |
| Erosion of the investigating institution        | Madlanga findings, the National Commissioner's suspension, criminal charges against 13 officers, acting leadership in both the service and the ministry, contested PKTT status, and a final report deferred to 16 November.      | Consensus view. High confidence.                                                    |
| Organised crime and municipal politics converge | Extortion networks, taxi-sector actors and tender-linked groups operate across markets with reported party linkages. The Knysna cluster included a taxi forum office bearer alongside two councillors.                           | Consensus among crime researchers. Medium-high confidence.                          |
| Anti-migrant mobilisation as electoral strategy | A shift from episodic xenophobic violence to organised, dated, election-linked mobilisation, now with a 30 September national action five weeks before polling.                                                                  | Established and accelerating. High confidence on tempo, medium on electoral effect. |
| Legitimacy deficit rather than service deficit  | Protest is increasingly directed at the persons and property of local representatives. Municipal labour action adds a second internal mechanism.                                                                                 | Growing consensus. Medium-high confidence.                                          |

| Theme                                                | Description                                                                                                                                                                                                                    | Analytic weight                                                                   |
|------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Fragmentation as the permanent condition             | Hung councils, coalition norm-setting and kingmaker minor parties shift the decisive contest from polling day to post-declaration negotiation.                                                                                 | Consensus view. High confidence.                                                  |
| Hyper-local information manipulation                 | Generative AI shifts disinformation from national narratives to ward-level deception, below the detection threshold of national media and fact-checkers. Now met with draft binding rules.                                     | IEC-led assessment corroborated by SANEF. Medium confidence on realised severity. |
| Deterrence rhetoric outpacing prosecutorial delivery | Repeated warnings from NATJOINTS and police leadership sit against a weak historical conviction record, though the Knysna arrests were fast and are a genuine counter-example.                                                 | Contrarian to official framing. Medium-high confidence.                           |
| Political violence against the national crime trend  | Murder fell 5.9 per cent nationally in the April to June quarter while political killings rose, indicating an election-cycle driver rather than general criminality.                                                           | New. High confidence.                                                             |
| Countervailing democratic resilience                 | Roll certified at 29 million with roughly two million added, about 80 per cent of new registrants aged 16 to 29, Treasury top-up funding, parliamentary satisfaction and clean delivery of the roll and nomination milestones. | Important counterweight. High confidence.                                         |

## 5. RISK ASSESSMENT

Ratings use a five-point likelihood scale of Remote, Unlikely, Possible, Likely and Almost Certain over the horizon to 31 January 2027, and a four-point impact scale of Limited, Moderate, Major and Catastrophic assessed against national security, democratic legitimacy and economic disruption. The composite rating is an integrated analytic judgement rather than a mechanical product.

### 5.1 Overall assessment

**Overall election security risk: HIGH and deteriorating.** Driven by targeted assassination running at roughly one incident every ten days, now compounded by lethal violence against investigating officers, degraded state investigative capability, and an organised anti-migrant protest cycle with a declared national action on 30 September. Risk to the integrity of the poll itself is MODERATE and the electoral machinery has performed. Risk to the safety of political officeholders, candidates and those investigating attacks on them is HIGH. Risk of nationwide mass unrest is LOW with catastrophic tail impact. The profile is elevated now, sharpest between 28 August and mid-October, spikes on and immediately after 4 November, and remains elevated through coalition formation to January 2027.

### 5.2 Risk register

| Risk                                                           | Likelihood     | Impact | Composite | Basis and key indicators                                                                                                                                                                                                |
|----------------------------------------------------------------|----------------|--------|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Targeted assassination of candidates, councillors or officials | Almost Certain | Major  | CRITICAL  | Realised at scale: 23 incidents and 26 deaths across five provinces in 2026, four Knysna deaths in eight days, 18 KZN councillors since 2021. Base rate places 56 per cent of election-year assassinations in municipal |

| Risk                                                                           | Likelihood     | Impact   | Composite     | Basis and key indicators                                                                                                                                                                                                                                                                                        |
|--------------------------------------------------------------------------------|----------------|----------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                |                |          |               | cycles. Watch the window from 28 August to mid-October and the 16 September list publication.                                                                                                                                                                                                                   |
| Violence against police and investigators working political cases              | Likely         | Major    | HIGH          | Realised 26 August when a tactical response captain investigating the Knysna killings was shot dead. Treat protective and investigative deployments in active clusters as hostile environments.                                                                                                                 |
| Intra-party violence and disorder around candidate selection                   | Almost Certain | Moderate | HIGH          | Nominations closed 28 August, lists public 16 September, 42 ANC metro aspirants for eight posts still unresolved into September. Realised protest in Khayelitsha, Samora Machel, several KZN wards and the Johannesburg region.                                                                                 |
| Anti-migrant protest escalating to violence against persons and businesses     | Likely         | Major    | HIGH          | 30 September national action declared, five weeks before polling, organisers claiming greater capacity than 30 June which produced roughly 150 demonstrations with about a quarter violent. Concentrated in KZN, Gauteng, Mpumalanga and Limpopo.                                                               |
| Extortion and intimidation of incoming councillors and municipal supply chains | Likely         | Major    | HIGH          | 770-plus extortion cases since November 2024, 180-plus projects and about R63 billion disrupted 2019 to 2024, asserted party linkages, taxi-sector overlap evidenced in Knysna. Peak exposure begins at swearing-in.                                                                                            |
| Post-election coalition instability, council disorder and kingmaker coercion   | Likely         | Major    | HIGH          | 66-plus councils already hung, coalitions the expected norm, minor parties as kingmakers. Watch results declaration to first council sitting, mayoral election votes and motions of no confidence.                                                                                                              |
| Degraded state capability to detect and prosecute political violence           | Likely         | Major    | HIGH          | Acting leadership in both the police service and the ministry, 13 officers charged, contested PKTT mandate, alleged off-books Crime Intelligence operation, Madlanga final report deferred to 16 November, reported 6,000 officer shortfall against 26,000-plus stations. Partly offset by fast Knysna arrests. |
| Violent service delivery protest and municipal labour disruption               | Likely         | Moderate | HIGH          | Lesedi fatality and mayoral property arson, SALGA 400-plus incidents since 2000, Afrobarometer 17 per cent, Msunduzi strike with tear gas and rubber bullets. Watch water and electricity interruptions during campaigning.                                                                                     |
| Hyper-local AI disinformation and deepfakes degrading confidence in the result | Likely         | Moderate | MODERATE-HIGH | IEC and SANEF assessment, fake IEC registration and job-advert sites confirmed. Mitigated by draft binding campaign regulations. Watch ward-level fabricated audio and video in the final fortnight and results-night rigging narratives.                                                                       |
| Disruption of voting on 4 November                                             | Possible       | Moderate | MODERATE      | Localised protest at stations is a recurring but historically contained feature. Roll certification and nomination close both                                                                                                                                                                                   |

| Risk                                                                   | Likelihood | Impact       | Composite            | Basis and key indicators                                                                                                                                                                                                                                                                                                                              |
|------------------------------------------------------------------------|------------|--------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                        |            |              |                      | delivered cleanly. Watch ward-level boycott calls, road blockades and access denial in informal settlements.                                                                                                                                                                                                                                          |
| Cyber attack or systems failure affecting IEC results or voter systems | Possible   | Major        | MODERATE             | Impersonation sites confirmed. Compressed procurement timelines add operational fragility. Watch results-system availability on the night, denial of service and defacement.                                                                                                                                                                          |
| Attacks on electoral staff, IEC infrastructure or voting stations      | Possible   | Moderate     | MODERATE             | NATJOINTS has made protection of election infrastructure an explicit pillar. No significant 2026 incidents reported to date.                                                                                                                                                                                                                          |
| Nationwide mass unrest on the July 2021 scale                          | Unlikely   | Catastrophic | MODERATE (tail risk) | ISS baseline judgement holds: improved state, private security and business coordination and reluctance among 2021-affected communities. But 2021 produced 300-plus deaths and about R50 billion in damage and instigator networks remain largely unconvicted. Watch explicit incitement by senior figures and a triggering arrest or judicial event. |
| Postponement, partial failure or non-delivery of the poll              | Remote     | Catastrophic | LOW                  | Roll certified 26 August, nominations closed on time, funding secured, Parliament satisfied. Constitutional window closes 30 January 2027.                                                                                                                                                                                                            |
| Foreign interference in the campaign or information environment        | Possible   | Moderate     | LOW-MODERATE         | No specific credible open-source reporting of state-sponsored interference in this cycle. Assessed low on evidence, not on absence of capability.                                                                                                                                                                                                     |

### 5.3 Risk by phase

| Phase                           | Risk level           | Dominant risks                                                                                                                                                                                                                              |
|---------------------------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 to 15 September 2026          | HIGH, sharpest phase | Post-nomination retaliation while internal outcomes are known privately and not yet public. ANC national officials select metro mayoral candidates from the 42-name pool.                                                                   |
| 16 September to 31 October 2026 | HIGH                 | Candidate lists public and disputes litigable. Peak campaigning with maximum candidate exposure at rallies and canvassing. 30 September national day of action. Madlanga evidence deadline 2 October. Escalating ward-level disinformation. |
| 3 to 5 November 2026            | MODERATE-HIGH        | Station-level intimidation, blockades and localised boycotts. Results-system availability. Disinformation surge on results night. Heaviest security deployment of the cycle.                                                                |
| 5 November 2026 to January 2027 | HIGH                 | Disputed-result protest, council chamber disorder, coercion of kingmaker councillors, violence linked to allocation of mayoralties. Madlanga final report lands 16 November during council constitution.                                    |

| Phase              | Risk level                     | Dominant risks                                                                                                                |
|--------------------|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| From December 2026 | HIGH for a specific target set | Extortion approaches to new councillors and supply chain officials, retaliation for lost positions, early coalition collapse. |

#### 5.4 Priority geographies

| Area                                                              | Rating       | Rationale                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Western Cape (Knysna and Garden Route, Cape Town metro townships) | CRITICAL     | Four killings in eight days in Knysna including a police captain, taxi-sector nexus confirmed, four suspects in custody. DA ward candidate and other candidates killed earlier in the year. Documented Khayelitsha and Samora Machel nomination disputes. Entrenched extortion economy across construction and transport.  |
| KwaZulu-Natal (eThekweni, Msunduzi, rural districts)              | CRITICAL     | 18 councillor assassinations since 2021 with eThekweni highest at five. 6 August Klaarwater killing. Contested PKTT is KZN-focused. MK Party leadership disorder in its core province. Highest registration volume. Msunduzi under municipal labour disruption. SADC summit protest staged in Durban. July 2021 epicentre. |
| Gauteng (Johannesburg, Ekurhuleni, Tshwane, West Rand, Lesedi)    | CRITICAL     | ANC mayoral contest unresolved across three metros into September. MK and EFF members killed on the West Rand. Lesedi protest fatality and mayoral property arson. Densest anti-migrant footprint and Operation Dudula presence ahead of 30 September. Largest concentration of economic exposure.                         |
| Eastern Cape (Nelson Mandela Bay, Buffalo City)                   | HIGH         | Councillor murder in Gqeberha. Long-standing coalition instability in Nelson Mandela Bay. Second-highest registration volume. Acute service delivery and water stress.                                                                                                                                                     |
| Mpumalanga and Limpopo                                            | HIGH         | Documented candidate-selection assassination pattern in Mpumalanga. Both identified as anti-migrant sentiment concentrations. Contested municipal control. Thin independent media coverage creating a reporting gap.                                                                                                       |
| North West and Free State                                         | MODERATE     | Recorded history of political killings and severe municipal dysfunction, lower current incident tempo and lower registration volumes.                                                                                                                                                                                      |
| Northern Cape                                                     | LOW-MODERATE | Smallest voter base and limited incident reporting. Distance and thin policing density are the main operational constraints.                                                                                                                                                                                               |

## 6. OPPORTUNITIES / POSITIVES

Presented as genuine positive developments and actionable openings rather than as reassurance.

Democratic participation is holding up better than the apathy narrative suggests. The certified roll stands at roughly 29 million after two registration weekends added about two million voters, with around 80 per cent of new registrants aged between 16 and 29 and 59 per cent of youth registrants female. That is a meaningful counterweight to the legitimacy deficit and a foundation for locally credible civic and voter education engagement.

Enforcement is producing visible results in at least some cases. Four suspects were in custody in the Knysna matter within days and three appeared in court on 24 August, which Cabinet specifically commended. Extortion enforcement shows 241 arrests and 176 convictions from more than 770 reported extortion cases since November 2024. Reporting into the current enforcement channel therefore carries a non-trivial probability of consequence, which is a better position than the historical norm.

Institutional accountability is functioning, even if painfully. The Madlanga Commission is producing findings that are being acted on, and the return of PKTT dockets shows internal correction is possible. A cleaner post-inquiry policing environment is a plausible medium-term outcome, and organisations with a stake in policing reform have an unusually receptive window.

Security coordination architecture is mature and accessible. The NATJOINTS elections priority committee co-chaired with the IEC, activated joint operational centres and a stated intelligence-led approach give business, civil society and municipal actors a defined counterpart for liaison, threat reporting and deconfliction. Early engagement is materially easier now than it will be in late October.

Counter-disinformation infrastructure has moved from intent to instrument. Draft campaign regulations would place binding obligations on parties to label AI-generated material and correct false claims, alongside zero-rated verification portals and rapid-response pathways through community radio and youth networks. These are practical, locally targeted and open to partnership by media, civil society and employers wanting to reach staff and communities with verified information.

Fiscal and parliamentary support for the poll is in place, and delivery has been clean. R1.116 billion allocated plus an additional R1.1 billion from Treasury, satisfaction from both SCOPA and the Standing Committee on Appropriations, a roll certified on schedule and a nomination process closed on schedule substantially de-risk the logistics of delivery.

Fragmentation creates genuine accountability pressure. Contestable councils and coalition dependence mean incumbents can be removed, which is the strongest structural incentive for service delivery improvement in a generation.

## 7. FINAL THOUGHTS

**South Africa will deliver this election, and the evidence for that is already on the record.** The voters' roll was certified on schedule at roughly 29 million, about two million of them newly registered and most of those under thirty. Nominations closed on time. Funding was secured and Parliament is satisfied. Four suspects were in custody in Knysna within days of the killings, and national murder figures fell by 5.9 per cent in the last reported quarter.

None of that erases twenty-six deaths in eight months, and every risk set out in this report should be planned for seriously. It is worth being clear, though, about what the violence is a symptom of. Municipal power in South Africa is genuinely contestable for the first time in a generation. That is why a ward is now worth killing for, and it is also why a ward is worth winning, campaigning for and voting in.

**Political killings in 2026 have involved a few dozen people. The certified roll holds 29 million. On 4 November those 29 million get to settle what defines this election.**