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Ramaphosa could conclude two terms as his stars finally align

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Ramaphosa's reform push is finally gaining momentum. As a result, SA is currently enjoying a more stable macroeconomic backdrop than it has in years. But will it last or will the president be recalled by his party before his term is up, like his two predecessors. The BER's analysts think Ramaphosa is just hitting his stride and will avoid becoming a lame duck

President Cyril Ramaphosa's state of the nation address (Sona) suggests that as a leader he may be finally coming into his own.

Certainly, it can be argued that it was eight years too late for him to finally show up for South Africa in the way he did last Thursday; that this was the address SA needed back in 2019. But what really matters is that he has now hit his stride.

His underlying theme was the deepening of institutional reform across the state – from reforming the criminal justice system to the country's water boards.

He was honest about the absence of quick fixes for SA's deep challenges and the multiple crises we face. But he was also refreshingly clear-eyed about what needs to be done - something he has not been since taking office.

Granted, he has faced numerous catastrophes since then, including inheriting a state crippled by corruption; a debilitating energy crisis; the Covid-19 pandemic; the July 2021 riots; an onslaught from the white right, abetted by irascible US president Donald Trump; the emergence of former president Jacob Zuma's disruptive MK Party and having to steer the ANC through its first post-democratic electoral loss and then holding together a coalition government.

But now his reform push is finally gaining momentum: the country's macro-economic credibility has strengthened thanks to sustained fiscal discipline, the shift to a lower inflation target and the durability of the GNU. In fact, SA is currently enjoying a more stable macroeconomic backdrop than it has in years - something which might explain Ramaphosa's new-found energy.

But can his reform push last? Well, it depends on how much longer he will have the political capital, both within the ANC and across society, to continue driving it.

It is critical for his administration to build on its current momentum, but Ramaphosa is in his final term as ANC president, with the party set to elect his successor next year.

Historically, as factions realign ahead of a second-term conference, the incumbent is largely sidelined, risks becoming a “lame duck”, or becomes reviled, resisted and sometimes, ultimately, removed.

Take the last two ANC presidents, for instance.

Zuma’s 2016 Sona address is memorable only for the political chaos that preceded it.

He was in his second term, a full year before the ANC was set to elect his successor.

Two days earlier, in a historic court case over the R250m upgrades to his private residence at Nkandla, Zuma’s legal team was forced to concede that he should personally pay back the cost of the upgrades incurred by the state.

This was soon after Zuma plunged the economy into a crisis when he appointed Gupta stooge Des van Rooyen as finance minister. The Machiavellian move rattled even Zuma’s most ardent backers, igniting a spark that would ultimately lead to his recall.

A decade earlier, in February 2006, when former president Thabo Mbeki delivered his Sona, the ANC and its allies were quietly consolidating support around Zuma.

Both former ANC presidents began their terms as the country’s president with an ironclad mandate but, very soon after being replaced as party president, were ejected by their own movement.

Ramaphosa’s entry into the ANC presidency could not have been more different.

The party elected him almost reluctantly. In fact, Ramaphosa’s backers had effectively accepted defeat at the ANC’s Nasrec conference in 2017, hours before the results were announced, unaware of the “unity” pact between provincial powerbrokers in Gauteng and Mpumalanga which would eventually propel him to the presidency.

And whereas both Mbeki and Zuma’s influence began to wane in their second terms, Ramaphosa seems to be hitting his stride politically. This suggests that the manner of his exit could also be vastly different to that of his predecessors.

An ANC with a two-third’s majority (under Mbeki) and an outright majority (under Zuma) had the luxury of removing presidents prematurely even though these divisive exits resulted in debilitating splits – first, the formation of Cope and later, the MKP.

Can an ANC running a coalition government nationally, with its support at an all-time low of 40%, afford another divisive recall, particularly of a president whose reform agenda is actually starting to yield results?

The ANC has another problem – who it selects to succeed Ramaphosa matters deeply. In fact, it has become an existential question for the party and, perhaps, for the nation as a whole. Clearly, neither the ANC nor the country can afford another Zuma-esque leader who hops from one scandal to the next while the state buckles under the weight of neglect and corruption.

At present, the front-runner is deputy president Paul Mashatile, but powerful players in the national leadership fear that under his tenure the country could suffer a repeat of Zuma’s “nine wasted years” or worse, that the ANC could face electoral decimation.

Reports of Mashatile’s lavish lifestyle have raised eyebrows, but the lack of clarity over what principles and policies he supports also counts heavily against him.

The names of alternative candidates – Fikile Mbalula, Thoko Didiza and Patrice Motsepe – arise often. Yet none seems to have any real traction behind their campaigns.

The ANC is in limbo on the succession question, preoccupied by the looming local government election. Given its dismal delivery record at municipal level, the green shoots of Ramaphosa’s reforms are all it is going to be armed with on the campaign trail.

So, as things stand, Ramaphosa is unlikely to enter the lame-duck phase. If he continues to play his cards right, and quickly implements impactful actions, he may just become the first ANC president to conclude two terms in office. Indeed, if he continues to drive reform with the decisive leadership on display in his Sona, it is the country that will be the biggest beneficiary.

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