What the state verdicts say about Indian politics

The exit polls prepared us well for what unfolded on counting day. There was a broad consensus among pollsters on the direction of the verdict — the Bharatiya Janata Party (BJP) retaining four states and the Aam Aadmi Party (AAP) comfortably winning Punjab. The Congress had a fighting chance in Goa and Uttarakhand, but the final tally in these states is another nail in the coffin of India's Grand Old Party.

What are the big takeaways from the verdict?

First, the BJP may breathe a sigh of relief as the party has been struggling to win states since 2019. It barely managed to return in Haryana and Bihar, and did so with the support of allies. The party lost Jharkhand, failed to form the government in Maharashtra, continues to remain a marginal player in Tamil Nadu and Kerala, and couldn't meet its own heightened expectations in West Bengal. The party's only solace was retaining Assam. The victory in the four states, especially in Uttar Pradesh (UP), has definitely made things easier for it as far as the election of the President of India is concerned (scheduled to take place in July this year). It will also boost the morale of the party against the background of economic distress, the ongoing pandemic, and continuous attempts to forge an alliance of Opposition parties.

Rahul Verma

Second, the scale of the party's victory in UP indicates the long-term potential of the social coalition the BJP curated between 2014 and 2019. The presence of the BJP as a formidable player in states with a significant Muslim population is likely to create bipolarity due to the consolidation of votes along the axis of religion. The sheer arithmetic weight of this broad-based Hindu coalition is so high that any oppositional challenge needs to be extraordinary to defeat it.

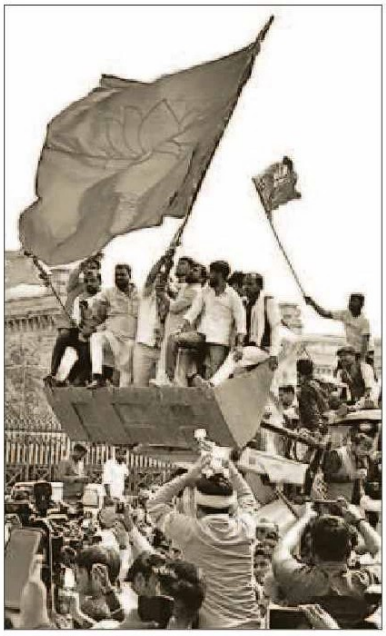
The results indicate that even if parties such as the Samajwadi Party (SP) improve their vote share, bipolarity along with BJP's strong base will ensure a glass ceiling that is hard to breach in the absence of a new political imagination. The BJP's social coalition of upper castes and non-dominant lower castes is held together by an ideological glue of ethno-political majoritarianism, aided by the delivery of welfare benefits, mobilised by charismatic leaders on the top, and complemented by deep organisational prowess on the ground. The loss of a few percentage points of vote share, thus, is unlikely to impact the party's chances. Even in states that it could not win, such as West Bengal, the party has emerged as the principal challenger from being a marginal player.

Third, the BJP's electoral success is a result of continuous political alertness and creativity. Sure, it is also marked by a certain level of unilateralism in which the party has pushed legislation without sounding out all stakeholders, but it has not shied away from taking two steps back when pushed against the wall. The party has moved swiftly, creating one ideological wedge after the other and keeping the Opposition in suspense. Simultaneously, it has creatively crafted new political categories of beneficiaries of welfare schemes and women. These have helped the BJP to overcome the gender disadvantage it faced pre-2014. In the past eight years, the gender gap has not only closed, but now as the exit poll estimates indicate, the BJP enjoys greater support among women. This became clear in Bihar 2020 and Assam 2021. In all four states the BJP won, women voters have catapulted the party to victory. We need greater research to understand the connection of women voters with the BJP, because if this pattern continues then we are looking at a tectonic shift in Indian politics.

Fourth, while it would be too early to suggest that the AAP, with its sweeping mandate in Punjab, is likely to emerge as a main national challenger to the BJP, it could prove costly for anyone to ignore the perceived traction of the former's Delhi Model of governance. The AAP's rise in the short-term will help the BJP as the former will eat into the Congress vote. And the party's attempt to now quickly expand may shake up the frozen patterns of political competition in several states in north and west India. The Congress must brace itself for another round of attrition with the AAP's entry.

Finally, these results also carry the potential challenges that the BJP will have to encounter sooner or later. Concerns related to the economy, unemployment and inflation are real issues, and the BJP can only ignore these at its own peril. Exit poll data from all states, especially UP, indicate that the BJP is no longer the most preferred party among young voters, as used to be the case between 2014 and 2019. The BJP also fares poorly among students, unemployed, and low-wage labourers.

Can the BJP weather the brewing storm among young Indians anxious over their economic prospects or does it not need to worry given the state of the Opposition? Are we likely to see more street-level protests and mobilisation in absence of credible and effective electoral Opposition? The answer will determine the course of Indian politics in 2024 and beyond.



The BJP's electoral success is a result of continuous political alertness and creativity. It has moved swiftly, creating one ideological wedge after the other and keeping the Opposition in suspense HT

Rahul Verma is with the Centre for Policy Research (CPR), New Delhi
The views expressed are personal