



People at the centre

The BJP needs to be more constructive, inclusive in approach to nation building

People are, and should be, at the centre of a democracy. The outcome of the 18th general election is an unambiguous reiteration by the people of that tenet. As the verdict unfolded on June 4, the Bharatiya Janata Party (BJP) fell short of an absolute majority in the Lok Sabha, which is a far cry from its claims made during the campaign. The National Democratic Alliance (NDA), which the BJP leads, has, however, won a majority, getting more than 290 seats. The BJP's individual tally is 240, which is 63 fewer than its 2019 strength of 303. Two NDA partners, the JD(U) in Bihar and the TDP in Andhra Pradesh, which have won 12 and 16 Lok Sabha seats, respectively, will hold significant sway in the Lok Sabha, as will other regional parties in general. The verdict of the people cannot be clearer than this – it wants the BJP to be more conciliatory and less confrontational towards the political aspirations of various communities and regions of India. The verdict also shows the limits of communal polarisation as a mobilisation strategy, which turned out to be the mainstay of the BJP's campaign. The outcome holds the BJP accountable, and demands it be more constructive. The BJP must heed that message in a democratic spirit, and reorient itself to the reality of the reemergence of coalition politics after 10 years.

The Congress, which nearly doubled its 2019 tally to reach 99 seats, has restored its position as the other pole of Indian politics, though it finished a distant second. It too should respect the verdict, and resist any temptation to attempt any post-poll coalition at this moment. The pre-poll coalition led by the Congress – INDIA – has not crossed the halfway mark, while the NDA has. Respect for the people requires all parties to remain steadfast to their pre-poll alliances and positions. The Congress has managed to form and lead an alliance in spite of the many internal contradictions, and its leader, Rahul Gandhi, has elevated himself in the public eye as a challenger to Prime Minister Narendra Modi. The Congress organisation, strategy and communication worked for it this time, while the BJP came up short on all three factors when measured against its claims. The party runs a serious key person risk, with its campaign, strategy and thinking all dependent on one person, Narendra Modi. The overwhelming charisma and style of Mr. Modi served the party well in 2014 and 2019, but the same factors were corroding the party's organisational strengths and withering its regional and local leadership. These factors, and the accumulated anti-incumbency of two terms, caught up with the BJP. Still, that it won a third term, though in alliance, is remarkable. Its ideological agenda has taken deep roots in its strongholds, enabling it to win what it has even amid clamour about inflation, unemployment and other livelihood issues. By winning a seat in Kerala, the BJP breached a fortress, and by defeating the BJD in Odisha, the party has captured the imagination of a new terrain. That said, the people did not take kindly to its strategy of portraying its return to power as an inevitable fate of Indian democracy.

The Congress strategy of making livelihood issues and equity questions the core of its campaign seemed to have worked well in its direct contests with the BJP in Karnataka and Rajasthan. Both parties that operate at the national level should learn the right lessons from this verdict. The lifeblood of Indian democracy is its diversity and the BJP has been less than respectful of that in the last 10 years. The new government will be required to deal with two particular questions that are critical to India's federalism and diversity – the delimitation of Lok Sabha constituencies after the publication of the first Census after 2026; and the ongoing work of the 16th Finance Commission which is scheduled to submit its report in 2025. Both these call for political wisdom, wide consultations and maturity. The verdict for a coalition government at the Centre underscores the diversity of India, and the role of States and regional political parties in its federalism. Coalitions are not a deficiency in a plural democracy, but quite the opposite. Rather than attempting inorganic and transactional coalitions, both the Congress and the BJP should nurture genuine, organic coalitions with regional parties and social groups. Enforcement of uniformity cannot be the aim of a federal polity, and the people have spoken on this issue loud and clear in 2024.

The outcome of 2024 should also put to rest the unnecessary fear mongering about EVMs, though serious and urgent steps are required to reinforce public trust in the electoral process. EVMs have been around for long enough, and until now, have recorded results that align with what campaigners and observers report from the field. Responsible leaders and parties should not amplify conspiracy theories. The Election Commission of India (ECI) faced a lot of flak, largely for justifiable reasons, and the remedy cannot be combative rebuttals but more confidence building. Notwithstanding its shortcomings, the 2024 elections turned out to be proof yet again of the vitality of India's democracy and its electoral system, and the ECI deserves credit. An issue that requires the attention of the ECI and the government is the function of exit polls. The speculative hysteria that it generates ahead of the actual results is hardly an innocent sport. Exit polls could influence stock markets, for one, and many of the channels have business interests and are heavily invested in the markets.

India has once again proved to itself and the world that it is a vibrant, functioning democracy. The new government has a responsibility to live up to the expectations of the people, and they are much more than a voter base.

How India read the election, how the BJP reads the result

Five years ago, the Bharatiya Janata Party (BJP) promulgated the phrase, 'aayega toh Modi hi' (in the end, Modi will come'). At the time, the phrase communicated an efflorescence of support, particularly in the wake of a national tragedy and a subsequent government response in Pakistan. As the 2024 election came around, 'aayega toh Modi hi' gave way to a new slogan – 'Abki baar 400 paar' (this time, more than 400 seats). The party imagined the election less as a contest and more as an appointment. While the chattering classes were focused on whether the BJP would win 240 seats or 340 seats, the average voter we spoke to understood the real implications of total control and this raised anxieties about democratic erosion. It is these anxieties that framed the contours of the 2024 elections.

Crossing a red line

For so many years, the BJP has sought to defend itself against concerns of democratic erosion by pointing to the electoral support it receives. In this way, the BJP constructed its "democratic legitimacy" from its extraordinary performance in elections. But, democratic legitimacy is not about just winning elections. It is about winning fair elections. In the run-up to the elections, two Opposition Chief Ministers were jailed and countless important Opposition political leaders had to fight against investigative agencies or the tax department. The once-hallowed Election Commission of India (ECI) seemingly acted in a partisan manner in not censuring the Prime Minister and others for blatant violations of the Model Code of Conduct. The traditional media often refused to cover the campaign of the Opposition parties and concerns. This fed into the perception that elections were meant to be a foregone conclusion, a performative exercise.

It crossed a red line. The political theorist Robert Dahl argued that democracies require the citizens, as a whole, to be able to choose between all political actors and parties – that they can essentially compete on equal footing. Of course, all of this can be hard to measure. But in principle, there should be an "equality of opportunity" for all viewpoints and all political actors to be heard. It may be hard to define, but it is easy to spot when this equality is missing. This is why political theorist Adam Przeworski noted that a "minimal condition" of democracy is that political "alternation" is plausible, i.e., the ruling party loses from time to time.

In short, democratic erosion occurs when institutional manipulation entrenches a particular political actor or party in power. Some have argued that India's institutions will naturally be compromised when one party dominates. But to the democracy theorist, the causal arrow runs in the other direction – domination occurs when the state's core institutions have been compromised.

While this might seem like high-minded



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theory, these concerns express themselves in myriad ways. In Uttar Pradesh, the Dalit community, in particular, expressed concerns that the Constitution might change. Elsewhere, we heard complaints about the BJP "washing machine" – the use of investigative agencies to coerce popular politicians to defect to the BJP. In the South, many we spoke to expressed a fear that the federal bargain was being compromised, and that their linguistic identities were at risk. These may all sound like specific issues, but their root cause is the same – excessive coercion and manipulation of institutions from the ruling party.

The possible 'national issue'

Other anxieties about democratic erosion were also visible. Apart from the Constitution entering the realm of mass politics, voters recognising the extent of total media control, had turned to social media in search for alternative narratives, others spoke of fear (only after a lot of trust building, necessary to break the sullen silence) and still others of *tanaasahi* (dictatorship). Together, it was these issues that pushed the electoral discourse as it travelled through the seven phases. The sole campaigner, Narendra Modi repeatedly found himself on the back foot, deploying deeply polarising and divisive rhetoric and *ad hominem* attacks on the Congress Party to counter these claims.

The campaign was thus both a reflection and response to voter discontent emerging, in part, from the visible concerns over the democratic legitimacy of the BJP. To the extent that there was a "national issue" in this election, it was framed around concerns of democratic erosion – concerns that cut through, in different ways, across the country. Even those who were committed to voting for Mr. Modi and the BJP expressed a discomfort with the unbridled misuse of power. The election was framed by the BJP as a *fait accompli*. There were no demands that citizens could bring to their leaders, no issues upon which they could hold them accountable. Prime Minister Modi's third term was inevitable.

As the campaign rolled out, the BJP's quest for dominance raised a fundamental question that students of democracy have often grappled with – what does it mean when political parties fail to respond to concerns of citizens and yet entrench themselves in power so deeply and for a prolonged period? What kind of democratic legitimacy does the government derive in crafting and executing policy when elections are no longer seen as contests? These questions were dominant in the average voter's mind.

In some ways, glimpses of these concerns were visible throughout the five years of Modi 2.0. As the BJP sought to centralise power within itself and use the cult of Mr. Modi's personality to undermine formal parliamentary and electoral processes, citizens began to seek alternative sites

to exert democratic pressures. The movement against the Citizenship (Amendment) Act and the farmers' movement – one of the most critical moments in the 2019-24 government – successfully halted a major policy effort. But, it did so outside of formal processes, choosing the streets as the site of exerting democratic pressure rather than political parties, Parliament or even the polling booth. In this sense, what we began witnessing in India was a democratic process in which traditional institutions of the democracy no longer seek or command the same democratic legitimacy. Citizens were seeking alternative, informal sites for exerting democratic pressure to hold the government accountable.

As the campaign unfolded, this demand for accountability returned, albeit partially to the electoral process. When we spoke to voters about the electoral process, many expressed concerns about the lack of fairness in the process. The debate on electronic voting machine (EVM) manipulation, regardless of the truth, had percolated into the chatter in the rural hinterlands. It was this frustration and growing de-legitimisation of the BJP's democratic credentials that, to the Opposition's credit, it was able to harness, ultimately declaring this as the election to battle for the Constitution. The fact that the BJP had to spend a large part of the last two phases of the election reassuring the population that it would not change the Constitution, suggested that bottom-up feedback mechanisms were indeed working. Even concerns from farmers' protest, that had moved outside of the formal, democratic process, eventually found their way into the electoral arena. The BJP sustained some of its heaviest losses in the States of Haryana, Rajasthan, and Uttar Pradesh that had been touched by the protests.

Looking ahead

As we look forward to what happens next, much will depend on how the BJP reads the result. The BJP remains the single largest party in India and the National Democratic Alliance (NDA) will likely form the government with Narendra Modi as Prime Minister again. From his days in Gujarat to his meteoric rise to power at the Centre in 2014, political centralisation has been core to Prime Minister Modi's model of governance. There is little to suggest that he will change tack now. This forms the critical question for governance going forward. Will the BJP continue to walk down the path of political centralisation that we have been seeing since 2014, or will it recognise the limits that the Indian voter has placed on it? If it chooses to ignore this message, new sites of resistance will open up, but these will unlikely be within the confines of democratic institutions, as we have traditionally known. And it is in this interplay between the political centralisation and resistance, that the next chapter of India's democratic history will be written.

The average voter's anxieties framed the contours of the 2024 election, and much will depend on how the BJP responds to this

The site of a major political earthquake

In a moment that mirrors the two times when the dominant party of the country tasted political defeat (the Congress in 1977 and 1989), the stormy winds of change have emerged from the Hindi heartland in 2024. While the Narendra Modi-led National Democratic Alliance (NDA) might scrape past an absolute defeat, its all-conquering political warship also seems to have ruptured over the choppy political waters of the Gangetic plain.

Out of the 225 odd seats that form part of the Hindi heartland, the NDA has been restricted to 149 seats, a loss of 31 seats. The INDIA bloc, meanwhile, touched 74 seats.

The return of 'normal politics'

The BJP's seat-share in the Hindi belt had hovered close to 80% in the last two elections, having steamrolled both the Congress and opposing Mandal formations. In this general election, the BJP's seat share in the region has dropped markedly to around 60%, a shade above the 55% threshold the saffron party skirted around in the late 1990s (in 1996, 1998 and 1999). In that respect, the BJP's current performance aligns more with its traditional strengths in the region but falls much below the high watermark of the two Modi waves.

Broadly, it marks the return of 'normal politics' in the Hindi heartland.

Apart from the headline narrative of a receding Modi wave and the uneven performance of the ruling BJP, the Hindi heartland throws up a mishmash of mini-narratives, varying on a State-by-State basis.

The State of Uttar Pradesh, arguably, represents the biggest political earthquake of the election. The INDIA bloc has bested the NDA alliance 43-36 seats. The Samajwadi Party (SP), at 37 seats, has emerged as the single largest party, trouncing the BJP in the critical Purvanchal region.

For the first time since 2014, the SP's Mandal politics has overpowered the Hindu nationalism of the BJP. This has been achieved through a



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well-executed strategy of including Dalits in an enlarged Mandal coalition (what the SP leader Akhilesh Yadav terms the Pichda-Dalit-Alpsankhyak or PDA block). The party's increasing representation to Dalits (including in non-reserved seats), along with its alliance with the Congress, succeeded in taking away a section of Dalits from the Bahujan Samaj Party and the BJP towards the INDIA bloc. The BJP's loss in Ayodhya to the Dalit face of the SP, Awadhesh Prasad, represents a memorable capstone to the SP's winning strategy.

The only solace for the BJP might lie in its impressive performance in western Uttar Pradesh, partly helped by its alliance with the Rashtriya Lok Dal. The Congress, meanwhile, registered its best performance in the State since 2009, winning six seats. The Congress's surge in its erstwhile stronghold of Awadh, was made possible on the back of the unstinting support it received from the SP, with Akhilesh Yadav joining rallies on behalf of its candidates.

In Bihar, Rajasthan and Haryana

In Bihar, the Janata Dal (United) has matched the performance of the BJP, with both parties winning 12 seats each (the JD(U) contested on one seat less). Unlike earlier Assembly elections in Bihar, the allies of the BJP (the JD(U) and the Lok Janshakti Party) have romped home with a higher strike rate on their contested seats than the BJP. The results point to not just the continual dependence of the BJP on its alliance partners in the State but also increases their bargaining power *vis-à-vis* the BJP ahead of the crucial Assembly elections next year. While the INDIA bloc (Rashtriya Janata Dal-Congress-CPI(ML)) alliance has been restricted to just six seats (up from a single seat), the alliance was able to significantly reduce its vote-share gap with the NDA. The Tejaswi Yadav-led INDIA bloc campaign has also been able to mount a strong narrative on livelihood concerns, which might hold it in good stead for the upcoming Assembly elections.

The elections in Rajasthan and Haryana saw

the budding revival of the Congress in the Hindi belt. Much like Uttar Pradesh, the Congress's fortunes here have been boosted with a return of its Dalit voter base, attracted to its agenda of social justice and protection of the Constitution. While the BJP hung on to the majority of seats in Rajasthan, the Congress managed to pluck eight seats from its grasp. In Haryana, the Congress managed to split the verdict, winning five out of the 10 seats.

The Congress's creditable performance in semi-rural and rural districts in both States owed much to its emphasis on issues of farmer distress and wealth concentration. For the first time since 2009, the Congress swept the Jat belt in Haryana in a national election. Meanwhile, the party also brought back into its fold a large section of the Jats in Rajasthan, once the bedrock of the party in the State, which had steadily deserted it since the late 1990s.

BJP strongholds

The BJP has maintained its strongholds in Madhya Pradesh and Chhattisgarh, wiping out the Congress in Madhya Pradesh and restricting it to a solitary seat in Chhattisgarh. Apart from its core Hindutva appeal, what seems to have worked for the BJP is its stable appeal among tribal voters, who have largely stayed within the saffron fold despite Rahul Gandhi's Bharat Jodo Nyay Yatra earlier this year. These are also the States where the Modi wave does not appear to have ebbed. The BJP's dominance here partly stems from a lack of a distinct ideological challenge, and partly from a crisis of leadership within the Congress ranks. This election also marks out Madhya Pradesh as the pre-eminent saffron bastion, after Gujarat, deepening its more than two-decade-old dominance of the central State.

The results remind us that the dynamics of the subaltern challenge to Hindutva work much the same here as in other regions, forming a potent ideological counter to the politics of religious majoritarianism.

The results of the Hindi heartland are a reminder that the dynamics of the subaltern challenge can counter the politics of religious majoritarianism

LETTERS TO THE EDITOR

Now, the verdict

There are three very welcome developments that have arisen from the 2024 Lok Sabha verdict. First, we will now have a very strong Opposition that has been eluding us for many years. Second, the

Bharatiya Janata Party government will have a chance to find the positives from a coalition. Third, as a nation, the electorate has attained a maturity that is becoming scarce in even established democracies elsewhere. The people of

India have spoken and have authoritatively pushed to the front, issues that are at the very core of their concerns. This will help the government in course correction.
R. Narayanan,
Navi Mumbai

Using the power of his vote, the Indian voter has shown who the real boss is in India's democracy. The 'my way or the high way' style of governance was clearly not acceptable.
Devasdas V.,
Talap, Kannur, Kerala

The INDIA bloc has shredded the exit poll 'results' and will step into the 18th Lok Sabha as an effective and robust Opposition unit. The Prime Minister has to shake off the spirit of brute strength and work for the benefit of all

sections across India.
Rajamani Chelladurai,
Palayamkottai, Tamil Nadu



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Change wears the deceptive mask of continuity

The results presage the beginning of the end of the Modi era and also the decade-long domination of the BJP

Indian democracy can now breathe easy. The core values of the Constitution, which came under severe stress in the past 10 years, now stand well-protected. The BJP's politics of communal polarisation, which looked invincible, has been held in check. The people of India have given their verdict in the 18th Lok Sabha elections, and the verdict is for change.

At first glance, this may sound paradoxical, even false. How can it be said that the voters have given a mandate for change when the BJP, which has been in power since 2014, has again emerged as the single largest party in the lower house of Parliament and is, therefore, all set to lead the next government? But the way to read the outcome of the 2024 elections is to see that change has come wearing the deceptive mask of continuity.

Modi will commence his new innings on Raisina Road with reduced authority and diminished legitimacy. That shrinkage in power and popular prestige will by itself herald a rapid transformation in Indian politics, presaging the beginning of the end of the Modi era and also the decade-long domination of the BJP. The nation's political landscape will change significantly in the months and years to come, well ahead of the next parliamentary elections.

To the extent that there is no hung Parliament, this has been a mandate for stability. The NDA, led by the BJP, has crossed the halfway mark of 272 in a house of 543 seats. By ensuring political stability, the collective wisdom of the electorate has given the next government an opportunity to rule without facing immediate trials and tremors. This is good for India's democratic polity.

Nevertheless, the reduced numbers of the BJP — at least 60 less than the 303 seats it had won in 2019 — provide only one of the several reasons why Mr. Modi is a diminished leader today. He had begun his campaign with the bombastic slogan of "Abki baar 400 paar" (the NDA will win more than 400 seats). "Ek akela sab par bhaari (I alone am enough to vanquish all of you)," he had thundered in a chest-thumping speech



Prime Minister Narendra Modi with BJP chief J.P. Nadda in New Delhi on Tuesday. ANI

mocking the Opposition, in Parliament in 2023. The voters have now shown him his place.

Clearly, the days of Mr. Modi's politics of arrogance are over. He and Home Minister Amit Shah will no longer be able to misuse with impunity the Enforcement Directorate, the Central Bureau of Investigation, the Income Tax Department, and other coercive instruments of governance against their political opponents in a sham campaign against corruption. Even the media, large sections of which had been muzzled and turned into messengers of the BJP's politics of hate, will begin to reassert its independence. So, too, will the judiciary. Therefore, the

verdict has come as oxygen to an endangered democracy that would have been gasping for breath had the predictions of the exit polls come true.

New worries

But beyond his shrunken numbers, Mr. Modi will now have a new worry he never imagined would plague his third term. To stay in office, he will have to depend on two allies whose support cannot be taken for granted for the ensuing five-year term — the Telugu Desam Party (TDP) led by Chandrababu Naidu and the Janata Dal (United) led by Bihar Chief Minister Nitish Kumar. He will have to keep them in good hu-

mour to ensure cohesiveness of the new coalition government.

Mr. Modi's biggest headache will come from the erosion in cohesiveness within his own party. For the past 10 years, he, ably assisted by Mr. Shah, has controlled the BJP with unquestioned authority. But that luxury will now be denied to him and Mr. Shah. This is because two big States, Uttar Pradesh and Maharashtra, where the party has suffered its worst setback in this election, will almost surely slip out of the BJP's hands whenever the Assembly polls are held there. Mr. Modi, who made U.P. his own 'home' State by contesting from Varanasi, has to take the highest share of blame for the BJP's poor performance in the State. The third "strongman" in the party, U.P. Chief Minister Yogi Adityanath, has also been weakened by the party's dismal showing. Add to these troubles the fact that the relations between Mr. Modi and the Rashtriya Swayamsevak Sangh (RSS) are not at their harmonious best. Indeed, the RSS cadre did not work enthusiastically for the BJP's victory this time.

Cumulatively, therefore, "Who after Modi?" is a question that will begin to be asked increasingly in the time to come, and it will have no clear answers. This itself will open up the political space for new competitions and alignments

both within and outside the BJP.

No more hegemony

When the BJP won 88 seats in the 1989 general elections, which was a huge jump from its 1984 tally of a paltry two, L.K. Advani, the then party president, had famously quipped: "The winner comes second!" Subsequent developments proved him right because the BJP kept up its winning spree and succeeded in forming a coalition government of its own in 1998. The same quip can be said about the Congress this time, even though its jump from 52 to close to 100 is not quite as spectacular. Rahul Gandhi has revitalised the Congress, and its graph can only go up from here. Undoubtedly, the revival of the Congress at the national level — along with the strong showing of the SP, the TDP, the JD(U), the Shiv Sena (UBT), the NCP (SP), the Trinamool Congress, and others at the regional level — suggests that the BJP's hopes of further consolidating its hegemony over the nation's polity lie shattered. True, the BJP has managed to add Odisha to its bag of State governments. But, overall, these elections mark the start of the party's descent from the pole position it occupied in the nation's politics for the past 10 years.

India has changed. Let's welcome and accelerate this change.



Sudheendra Kulkarni

was a close aide to India's former Prime Minister Atal Bihari Vajpayee

Shrinkage in power, prestige

It sometimes happens, albeit rarely in history, that the seeds of a victor's defeat are sown by his victory itself. This is what has happened. Narendra Modi will in all likelihood be sworn in as India's Prime Minister for the third time in a row. That is by any yardstick a phenomenal achievement. Only Jawaharlal Nehru and Indira Gandhi have achieved this feat in the past. Yet, in his hour of historic success, Mr.

The similarities between two very different States

The results in Uttar Pradesh and Tamil Nadu herald the possibilities of a new form of progressivism

Uttar Pradesh and Tamil Nadu have little in common. The landlocked State of Uttar Pradesh is the largest in the Hindi heartland. It is one of the poorest States by per capita income and depends heavily on services and agriculture to employ citizens. Tamil Nadu is a coastal State in the deep south. It is among the richest States with a strong industrial and manufacturing base and houses perhaps the lowest share of Hindi-speaking people. U.P. Chief Minister Yogi Adityanath is a Hindutva hard-liner who wears his religiosity literally on his sleeve and does not shy away from blatant dog-whistling and minority-bashing to secure votes for his party. On the other hand, Tamil Nadu Chief Minister M.K. Stalin belongs to the DMK, a party that comes from a tradition of rationalism. He leads the Secular Progressive Alliance that includes parties that share an ideological oneness on the key issue of the plurality of the Indian nation.

victory against a BJP that was peaking in the Lok Sabha elections in almost every other State, while the Adityanath-led BJP in U.P. decisively defeated a 'Bahujan' coalition of the SP and the BSP.

The case of Tamil Nadu

Yet, in the 2024 Lok Sabha elections, these two States showed some remarkable similarities. The DMK-led alliance in Tamil Nadu secured all the 39 seats (plus one in Puducherry), which could be explained by some as the consequence of the splintering of the BJP-AIADMK alliance. But that would only be a partial reading. The collective vote share of the DMK-led alliance was nearly 10% points higher than that of the combined vote shares of the AIADMK and BJP-led alliances. The fact remains that this victory was yet another ideological defeat of the BJP and the politics that it stands for.

The DMK built its support base on the ideology of social justice. Among the others in the alliance, the Congress seeks to remain the



A Samajwadi Party supporter carries portraits of Akhilesh Yadav and Rahul Gandhi as he celebrates the SP's lead in Lucknow, Uttar Pradesh. AP

legatee of the organisation that led the freedom movement and embodied the secular Constitution after Independence; the Left aspires to make the idea of economic justice and equality more broad-based; and the VCK represents the interests of the marginalised Dalits in the State. The ideological coherence of this alliance was made possible by each of these parties shedding some of their respective antipathies towards each other: the DMK's acceptance of the Con-

gress as an ally required it to tone down its strident Tamil sub-nationalism in favour of an inclusive idea of a federal India, while the Congress aligned with the DMK despite historical differences. The Left aligned with the Congress by overcoming its own ideological reading of the latter as a representative of its class antagonists, while the VCK overcame the idea of being a "Dalit exclusionary" party to find common strands that connected it with its allies. The com-

munitarian IUML also adopted the language of secularism to secure its place in the alliance.

The BJP's emphasis on Hindutva, jingoism, social harmony between the privileged and the marginalised, and status quo over social justice, and the suzerainty of its one leader over that of a coalition of parties in power, rendered the DMK-led alliance a natural ideological adversary of it.

The case of U.P.

Meanwhile, the Samajwadi Party and the Congress coalition also managed a cohesion that went beyond an alliance of necessity. The SP adopted a new language of social justice that transcended old Mandal politics. It sought to represent the aspirations of a new coalition of "Pichdas" (backwards), Dalits, Alpasankhyaks (minorities), and Adivasis. It did so by fielding candidates from different Other Backward Classes and groups beyond its Yadav-Muslim base. The Congress made a strong pitch for safeguarding the Constitution and projected itself as a legitimate

vehicle of social justice. This ideological clarity brought the coalition substantial dividends.

A large section of people belonging to the "Bahujan" coalition of Dalits, backward communities, and minorities repeatedly emphasised their fear about changes to the Constitution, despaired over the ruling government's apathy towards their joblessness and poverty, and expressed anger over corruption in examinations for government postings. It was clear that the coalition's agenda was making a mark in the elections. Despite its best efforts to polarise the electorate, the BJP could manage less than half the seats in the State to which Ayodhya belongs (as part of Faizabad constituency).

After years in the wilderness, the Congress won six seats in U.P., while the SP won 38 out of the 80 seats. The 43-seat haul in U.P. and the sweep of 40 seats in Tamil Nadu and Puducherry provided a large bulk of INDIA's wins. Importantly, it also brought out the commonalities in the politics of social justice in two different States.



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The verdict points to the importance of economic issues

The crises of unemployment and persisting low wages, inadequate livelihoods from self-employment, and rising prices of essentials were all effectively ignored by the Modi government

The results of the Lok Sabha elections have come as a shock to those who had mistakenly believed in the problematic exit polls, which continued the narrative so assiduously cultivated by the Modi government. Many pundits who had confidently justified those false predictions have already jumped to explain the actual results. One main explanation is that the INDIA alliance emphasised social justice and the caste census, stitched up more astute coalitions, and made sharper candidate choices in terms of caste.

es, inadequate livelihoods from self-employment, and rising prices of essentials were all effectively ignored by the Modi government, both in its policy actions and in its campaign. The results show that these bread-and-butter issues continue to define the lives of the majority of people in the country.

This is where the promises made by the INDIA alliance, especially the Congress, may have been significant, especially in parts of the Hindi heartland such as Uttar Pradesh. Unlike the Modi regime, and sections of the media that faithfully reproduced the BJP's voice, these parties focused on issues of livelihood and employment, along with social justice. Their promises undoubtedly resonated with much of the electorate.

The focus on justice for youth, women, farmers, and workers, as well as dignity through social justice, which was highlighted in the Congress manifesto for example, necessarily implies a major shift in economic policy. In fact, what is required is nothing short of a fundamental transformation. The



A woman in Mayurbhanj district of Odisha. BISWARANJAN ROUT

most important shift is to move back to a framework of human rights, especially social and economic rights, rather than seeing public goods and services delivery as "gifts" from the state or a supreme leader.

This requires two immediate changes in the economic policy framework. The first is ensuring

basic social and economic rights for everyone by expanding the right to work (through a better funded and more flexible MGNREGA as well as the introduction of an urban employment guarantee scheme); the right to food, which is still inadequate and denied to at least 100 million Indians; the right to education, based on public delivery rather than expensive and exclusionary private education; the right to social security, especially through universal pensions provided at half the minimum wage to the elderly and those unable to work for other reasons; and the right to health, once again through public delivery.

The second is to create jobs to address the frustrated aspirations of millions of young people. This must become the primary economic goal. This requires expansion of public employment. First, vacancies need to be filled and all public workers, including "scheme" workers, need to be regularised. The needs of micro, small and medium enterprises, which have been battered by the

policy mistakes of the past decade, need to be delivered through a comprehensive package covering credit, access to new technologies and training, infrastructure provision, and marketing assistance. Farming continues to be in crisis. The valid demands of the farmers' movement need to be taken on board, ideally after a special session of Parliament devoted to discussing them in detail. Special attention needs to be paid to the ongoing impact of climate change and higher temperatures.

Much has been made of the "new welfareism" of the Modi government. But it is more accurately described as "the new branding around welfareism". Successive governments at the Centre and State have been oriented to the provision of welfare schemes, which are necessary given continuing poverty and poor human development indicators across much of the country. The Modi government advertised its interventions as completely new when these are, in fact, merely continuations or expansions of old schemes; or as

gifts from the Prime Minister. Instead, they need to be advertised as ways of fulfilling citizens' rights. For example, the free food ration has been touted as a major gift to around 800 million people. But in effect, the food being offered under the Public Distribution System under the National Food Security Act, 2013, brought in by the previous United Progressive Alliance government was already heavily subsidised — at only ₹2 per kg of wheat and ₹3 per kg of rice. So, this was not such a big difference. We need a shift from promises of welfare as "gifts" to a reaffirmation of the discourse on rights.

Revival of federalism

An important shift that is likely to result from this election is the revival of federalism, away from the undemocratic centralisation evident over the past decade. State governments are responsible for most of the public service delivery that affects people: it is critical for them to be able to provide these without interference, control and partisanship from the Centre.



Jayati Ghosh

is Professor of Economics at the University of Massachusetts Amherst. She taught the subject at Jawaharlal Nehru University, New Delhi, for nearly 35 years

Back to coalition

The BJP has been humbled, but Opposition should refrain from trying to form a government

After perhaps the most polarised and divisive campaign in recent times, Lok Sabha Elections 2024 have culminated on a sobering note with the ruling Bharatiya Janata Party (BJP) having been brought down from 303 seats in the 543-member Lower House to about 240 seats (until the time of going to press). Simultaneously, the principal opposition party, the Congress, gained in strength from a measly 52 seats in the 2019 general elections to about 98 seats.



As things stand, the BJP-led NDA which comprises N Chandrababu Naidu-led Telugu Desam Party (TDP) in Andhra Pradesh, Nitish Kumar-led Janata Dal (United) in Bihar along with several minor constituents such as Lok Janshakti Party, Rashtriya Lok Dal and Apna Dal totals up to about 294 seats, just about 20 seats above the majority mark of 272 in the Lok Sabha. The Opposition INDIA bloc has managed to corner close to 232 seats, 40 less than the magic figure of 272 seats. Already, the Congress has dubbed the results as a mandate against Prime Minister Narendra Modi and attempts seem to be under way to woo back the turncoats from the INDIA bloc, primarily Nitish Kumar and Chandrababu Naidu, with a view to displace the BJP and form an alternative government at the Centre. Such measures are ill-advised and do not bode well even if INDIA bloc manages to cobble together the required numbers. The need of the hour is to recognise that despite having lost about 60 seats, the BJP is still the single largest party in the Lok Sabha by a long margin and should have the first claim over government formation. It is also the only party at the moment to provide the most stable government. Despite the wind in its sails, INDIA bloc falls way short of the majority and should desist from attempts to form a shaky coalition government.

The noteworthy message from the results is that the electorate has spoken unambiguously against the kind of divisive rhetoric that the Bharatiya Janata Party unfortunately lapsed into. In fact, Uttar Pradesh, India's largest State which has been central to the BJP totting up robust majorities in the last two general elections, has now been instrumental in bringing the BJP below the majority mark; the BJP is likely to lose 30 seats over its tally of 62 seats in 2019. That the BJP is set to lose even in the seat of Faizabad where Ayodhya and Ram temple are located, speaks volumes about the disconnect between the BJP's electoral plank including Ram temple, Article 370, Hindu-Muslim divide and the issues that matter to the electorate today — namely unemployment, development, farm income, routine livelihood preoccupations *et al.* In the most under-developed and poverty-stricken parts of central and eastern UP, people responded well to the SP and Congress's promises of various "guarantees" particularly the promise of a "right to apprenticeship" that provides a legally-guaranteed apprenticeship to unemployed youth. Another element that altered the BJP's chemistry on the ground was the conversation around the Constitution — how Dalits perceived the BJP's "400-paar" sell as a threat of brute majority to amend the Constitution. This pushed Dalits to migrate from Mayawati-led BSP towards the SP-Congress coalition.

Indeed, the BJP's inability even to touch the majority mark implies that the immense political capital that the ruling party, especially the Prime Minister Narendra Modi, had garnered in his last two terms, now stands diminished. While it is creditable that the BJP has still been able to emerge as the single largest party after two terms in office, the emergence of a much stronger opposition ends a decade of single-party dominance, which had helped the BJP push its socio-economic and political agenda. With the party's new dependence on allies, it is not going to be easy to push its larger agenda, including the Uniform Civil Code.

It will be keenly watched how this new political formation impacts reforms and economic policy. The BJP's focus on increased capital expenditure and fiscal consolidation is at odds with the profligate populism professed by Naidu and Nitish.

From a position of brute majority, the PM will now have to learn to accommodate the allies. The Opposition will have enough numbers in Parliament to put all legislative agenda under intense scrutiny — provided it does so. Lastly, this verdict should lay to rest all doubts about EVMs and the Election Commission's impartiality. Elections-2024 once again prove that India is a unique, thriving multi-party democracy.

Modi and the coalition conundrum

In an election that was all about him, this result will seem like a loss to Narendra Modi

LINE & LENGTH.

TCA SRINIVASA RAGHAVAN

There are two main outcomes of the 2024 general election. One, the BJP will, in all likelihood, form the government for the third consecutive term with Narendra Modi as a highly diminished Prime Minister. Two, if he does, it will be the first time that he has been unable to win an outright victory and has to work in a coalition, even if a small one, and be dependent on two un dependable allies. This mixed outcome is both good and bad. The reason for the BJP's poor showing is the success of the Congress strategy of saying that the BJP will amend the Constitution to take away reservation for the backward castes. That, and the consolidated Muslim vote, has worked against the BJP in UP where it has perhaps lost as many as 30 of the 62 seats it had won in 2019.

It's been a body blow. Much now depends on the manner in which the BJP's allies, mainly the TDP in Andhra Pradesh and the JD(U) in Bihar which account for about 35 seats, choose to bargain.

The gap between the NDA and the INDIA alliance is so small, just about 60 seats, that they can make a difference to which formation forms the next government. The Congress party has said that it will discuss the possibilities on Wednesday with its partners. So, as of today, the matter of who forms the next government is still open and it's up to the President as to who she invites to form it.

Constitutionally she has to invite the single largest party first and ask it to prove its majority on the floor of the House. The BJP is the largest single party. So it does look as if it is game, set and match to the BJP. Once it forms the government it can quite easily increase its number of seats in Parliament. It's a past master at this.

Politics and the BJP's aggressive tactics aside, if Modi is invited to form the next government, it will only be the third time in India that a party and its leader are becoming Prime Minister for



BALANCING ACT. In a return to coalition govt, the last 10 years of single party majority government may seem like an aberration

the third time, and only the second time that it's for the third successive time. (In case there is some puzzlement about this, let me remind you that Indira Gandhi led three governments — 1966-71, 1971-77 and 1980-84.)

THIRD STINT BLUES

That said it is rare in modern democracies anywhere for a party or its leader to be elected for a third term, let alone a third successive term. This feat might sound impressive but it is not without the risks that arise primarily from the leader's sense that this is the last chance to carry forward his or her

Many leaders have faltered during their third term in office. Nehru and Indira Gandhi in India and Thatcher and Blair in UK. Modi would do well to avoid their errors

vision. It results in major errors of judgement. We have two examples in India: Jawaharlal Nehru and his daughter Indira Gandhi. Nehru had three successive terms and in his third term made the mistake of giving Mao Zedong the opportunity to attack India in 1962. India came off very badly in that war. Indira Gandhi didn't have three successive terms but she was sworn in as Prime Minister three times.

In her third term she made a mistake in her handling of the politics of Punjab. That eventually cost her her life. Abroad we have the examples of Margaret Thatcher and Tony Blair. Both became prime ministers for three successive terms. Both ended their careers very badly. Thatcher alienated her party over the poll tax — which is a fixed per capita tax regardless of income — and Blair over his participation in the Iraq war when it turned out that he had known that there were no weapons of mass destruction in Iraq.

Modi also runs the risk which arises from the belief that this is the last stab

at the job. He is almost 74 now and will be 79 in 2029. This feeling could be quite reinforced now because this election was only about him and he has not been able to pull off a simple majority. He would therefore have to guard against major errors of judgement that are made when circumstances combine to provoke them.

The Opposition too will have to behave itself. It had plenty of MPs in the last Parliament but made it impossible for it to function by its disruptive strategies. One must hope that just as the voter has matured and given a thumbs down to the BJP, the Opposition too will reward the voter by behaving sensibly.

Finally, India needs to ponder over a larger issue: do we have to resign ourselves to coalitions and minority governments and whether the 10 years after 2014 were an aberration. After all, in the 35 years since 1989 they have been the norm for six of the eight governments since then.

Winds of change in June

The BJP's underwhelming show could work well to strengthen democracy

A Srinivas

There are two ways of trying to understand the June 2024 general election results: figuring out the meaning of the verdict, or the reasons for the BJP's underwhelming performance; and its consequences for the new government. In the absence of sufficient information, it is hard to pinpoint the broader forces that have dragged the BJP below the majority mark.

But some surmises can be made: a sense of hubris; a feeling that a huge majority for the BJP could lead to the Constitution being fundamentally changed, taking away quotas for the dalits and OBCs; dissatisfaction over inflation and unemployment; a reaction to the promotion of personality cult using State resources; the perception regarding use of State power to browbeat political opponents; an attempt to steamroller regional parties; and maybe, an overdose of religious messaging and innuendo.

It will take some time to figure out which forces were at work, and in what measure.

But the results *per se* tell us a few things. First, the BJP's loss has been the Congress' gain. Congress had fared poorly in a straight contest against the BJP in the last two general elections. Therefore, the performance of the Congress this time should bolster its

confidence in upcoming Assembly elections in Maharashtra and Haryana.

REGIONAL ASSERTION

Second, the regional parties have held their own against the BJP juggernaut, with the exception of the Biju Janata Dal, whose loss in both the general and Assembly polls seems to be a straightforward case of anti-incumbency.

The election, characterised by the good show by DMK, Telugu Desam, NCP-Sharad Pawar, Shiv Sena (Uddhav Thackeray), Trinamool Congress and Samajwadi Party, marks a pushback against a homogenising force. Many of these parties came into being in the 1980s and 1990s to counter the centralising, anti-democratic tendencies of the Congress party at that time. Now, the wheel has come full circle, with the BJP being perceived in a somewhat similar way to the Congress of yesteryear — as a threat to regional forces.

In contrast to the BJP under Atal Behari Vajpayee, there are more regional parties against the BJP today than those with it. It is worth asking whether the BJP central leadership has paid a price for being too pushy and meddlesome with its erstwhile alliance partners.

This regionalist pushback marks a federal assertion against central policies, which should make the BJP strategists wonder whether its slogan of 'double-engine *ki sarkar*' in Assembly



INDIA. Return to coalition SAI SASWAT MISHRA

elections has been well received. To many, it would seem like the Centre trying to be the boss.

This pushback seems pronounced in Maharashtra, West Bengal, Uttar Pradesh and Tamil Nadu. The BJP brought the Maharashtra debacle upon itself by doing an 'Operation Kamal' there — bringing down the Maha Vikas Agadi government and triggering a split in the Nationalist Congress Party and Shiv Sena. BJP's alliance partners in Eknath Shinde and Ajit Pawar turned into liabilities, whereas Uddhav Thackeray benefited politically from his clumsy ouster.

The reasons for TMC surpassing its 2019 performance could be State-specific. Tamil Nadu's result could be influenced by familiar socio-cultural undercurrents.

The BJP has also benefited in certain

States due to local factors. It has reaped the benefits of anti-incumbency in Odisha. Its ally, Telugu Desam, has done the same in Andhra Pradesh. It should be a cause of some satisfaction to the BJP, and perhaps even the Congress, that Aam Aadmi Party, has not fared well in Delhi and Punjab.

The Congress might have nearly doubled its tally, but its performance in Karnataka, Himachal Pradesh and to an extent Telangana, where it is in power, should be a cause for concern — just as it can derive some satisfaction from its results in Maharashtra, Rajasthan, Uttar Pradesh, Tamil Nadu and Kerala.

The mood shift in India's biggest State, Uttar Pradesh, will be a subject of discussion for sometime.

The BJP will have some introspection to do on what went wrong. A quiet churn within the party cannot be ruled out.

A coalition government is a certainty. This is likely to balance Centre-State power. Its effects on policymaking are likely to be positive.

Decisions will be marked by more deliberation and negotiation. India's post-1990 experience with coalition governments has been quite positive. The virtues of 'absolute majority' are certainly overblown, as coalitions bring with them their own checks and balances, so essential in a democracy.

A return to sober governance, sans over-the-top ideological messaging and hyper-narratives, is perhaps what the people really want and need.

✉ **LETTERS TO EDITOR** Send your letters by email to bleditor@thehindu.co.in or by post to 'Letters to the Editor', The Hindu Business Line, Kasturi Buildings, 859-860, Anna Salai, Chennai 600002.

People's verdict

The counting today made for a nail-biting experience, with surprises and shocks all through. But one aspect that clearly comes out is the fact that by and large people have chosen good candidates over parties, which is quite a positive sign.

The results have been a mixed bag, wherein some set targets have not been met, while in some cases parties have performed beyond expectations. In a nutshell, the people have given an intelligent and well thought-out verdict, and not one based on emotions and favouritism.

Vijay Shekhar
Chennai

Course correction

There are three welcome developments that have come out of the 2024 Lok Sabha elections. One, we now have a very strong Opposition that has been eluding us for a decade. Two, we may have a BJP government that has the chance to benefit from a coalition arrangement. Three, as a nation the electorate has attained a maturity that is getting scarcer in even established democracies elsewhere. People have authoritatively pushed to the front issues that are at the very core of their concerns.

This will help the government in a course correction and a retuning of its policies.

R Narayanan
Navi Mumbai

Fractured mandate

The election results, which were to usher in Modi 3.0, were unexpected. The exaggerated and high pitch campaigns of the political parties have crashed and shocked both NDA and I.N.D.I.A alliances. UP shocked. Even opinion and exit polls lost credibility this time. The governance will undergo a change with focus on the economy, development agenda, industry and job creation. Several minor alliance partners have dissipated. There are several surprises in the defeat of

stalwarts. Two assembly election wins of NDA in Odisha and Andhra Pradesh will majorly transform NDA politics. PM Modi faces tough challenges in his third term. Subsequent elections should abandon caste and religious agenda.

Vinod Johri
New Delhi

Shun pro-rich policies

The results point to clarity in voters' mind. The winners need not feel elated and the losers need not feel dejected as the margins of victory and defeat were so slender. Another message this election result gives is that people in general are not happy with the pro-rich policy that has been pursued in the last 10 years.

There is a dire need to care for the middle class who cannot tighten their belts any further. Democracy survives better only in the presence of a strong opposition and absolute power given to any one party leads to authoritarian rule. Irrespective of the party that forms the government it is all the more important to keep in mind that enriching the rich, sharpening the communal divide and misusing the government agencies should be done away with. Focusing on employment, taming inflation and bridging the gap between the haves and the have-nots are to be prioritised, to avoid social conflict.

AG Rajmohan
Anantapur

Turning to the Budget

Focus must be on incentivising savings via tax route

Madan Sabnavis

An immediate market response to the election result can be gauged by how three indicators have moved. The Nifty ended at 23,263 on Monday and moved to 21,884 when the market closed on Tuesday. The 10-year bond yield which was at 6.95 per cent ended at 7.05 per cent while the rupee ended lower around ₹83.53/\$ from ₹83.14/\$ on Monday. Clearly the markets have been surprised with the exit polls not quite working out. However, this can be considered to be transient and the markets should revert to normal once the government is formed.

It can be argued that irrespective of the victory margin and the government that comes to power, there are certain areas which need to be addressed on the economic front. The two big policies coming up in the first two months would be the credit policy and the Budget. The credit policy is more in the realm of the Monetary Policy Committee which is independent and would deliberate and decide on the policy rate and any other related issues on June 7. Therefore, the repo rate and stance are outside the result of the elections.

SAVINGS AND CONSUMPTION
The Budget would, however, be the first immediate policy to be implemented by the government. It can be assumed that the Finance Ministry has already the blueprint of what needs to be done and hence it would be more of a review of the numbers as well as any new thought on the content which would be included. In fact, with the knowledge of both the fiscal performance in FY24 and the provisional figures of GDP for FY24, the numbers for FY25 can be relooked and revised.

Are there any specifics that would need to be covered in the Budget? On the taxation front there will be a need to look at how best to manage the right mix of consumption and savings which have been pain points in the last few years. Savings need to be increased to ensure that the current account deficit is under control and that domestic funds can be used for furthering investment. Here a call has to be taken on whether there should be any incentives provided on savings through the tax route. Any benefits on say interest or principal paid on home loans can boost not just savings but also help to accelerate investment. While the government has



SAVINGS. Must get a boost

indicated that it would like people to move to the new tax module where rates are lower but concessions not available, expanding on the tax concessions on savings would be pertinent in the current situation.

On the expenditure side the immediate need will be to look at ways of spurring investment in the private sector. Here it can be expected that there would be some outlays for a PLI like scheme for the MSMEs. This will help to not just increase investment but also create job opportunities in this segment and make the sector more competitive such that it becomes a part of the longer term aspiration of becoming a part of global value chains.

Outside the Budget the government will probably look more attentively at exports. This has been an Achilles heel for us. Notwithstanding the creation of SEZs and various incentives provided through duty drawbacks and cash incentives, exports of goods have been more demand driven and hence volatile. Here there is a strong case for drawing up a medium term strategy for the next three years where export of goods are able to attain a stable rate of growth much like what can be seen in case of exports of services. The way out is to sign more FTAs with countries so that there is fostering of both trade and investment flows.

Besides these areas of growth, the Centre will have to draw up plans with the States to ensure that the right direction can be given to both health and education, which is essential to ensure that there is a viable future for the youth. As these are concurrent subjects, the initiative has to come from both the governments.

The fact that the economy is well-positioned for a take-off is a big plus for the government. These issues can be taken up immediately to leverage this situation.

The writer is Chief Economist, Bank of Baroda. Views are personal



VINAY SAHASRABUDDHE

A political scientist commented on the 2024 verdict thus: 'The people of India have given NDA a victory that some feel like a defeat and given a defeat to the INDIA alliance that some feel like a victory.'

No doubt, this third consecutive victory of the NDA is historic in many ways. Notwithstanding the over enthusiasm seen in the Congress and INDI Alliance camp, one can't undermine the significance of BJP-NDA's victory under the leadership of Prime Minister Narendra Modi. The credit for NDA victory singularly goes to Modi's leadership. One must remember that the seats won by the BJP singularly are more than the combined strength of the partners of INDI Alliance.

This victory is remarkable on three counts. Firstly, this is the victory of PM Modi's Viksit Bharat agenda, notwithstanding some other campaign themes figuring in his speeches during the election. Secondly, this election brings back coalition era again in national politics. Thirdly, this election once again reminds us about the threat of vote bank politics in certain States, a phenomenon otherwise resoundingly rejected by the nation.

Let's start with Viksit Bharat. Remember, while Congress has doubled its seats, BJP's dominance continues from Karnataka-Telangana-Andhra in down South to Himachal-Uttarakhand in the North. Add to this BJP's remarkable success in Arunachal Pradesh and Odisha. While large parts of the country have gone with the BJP's appeal for Viksit Bharat, casteism being taken to a new height in States like Uttar Pradesh, Rajasthan and Maharashtra has tried to deeply damage the impact of Viksit Bharat narrative. This was the old Congress tactic of divide and rule, learnt by them from the British rulers of the pre-Independence era. People assailing the BJP for issues like mangalsutra and related issues, conveniently forget that BJP had no choice but to attack the idea of faith-based quota; so very close to the hearts of the Congress.

One can't forget that the BJP is the only party that has the courage of conviction to seek votes on the basis of its performance. Politics of performance

A mandate for Viksit Bharat

CONCERNS. This election also brings back the coalition era, and reminds us about the threat of vote bank politics in certain States



is the coinage of the BJP and no other political party has even uttered the word 'performance'. Sadly, Opposition parties in general and INDI Alliance in particular pushed a divisive agenda and indulged in mis-information as well as

rumour-mongering. The BJP and NDA were compelled to respond to this and caution voters about the vote-bank politics of the Opposition symbolised by their push for faith-based politics.

The second point is about the comeback of the coalition politics at the national level. If coalition politics and the resultant instability is to be avoided, national political parties will have to work more zealously for a well-oiled party organisation. Congress too must understand that maverick politicians like Mamata Banerjee would never be a part of a coalition other than one led by her. INDI Alliance leaders must understand

INDI Alliance must know that this verdict cannot and should not be interpreted as endorsement of their divisive politics of vote banks.

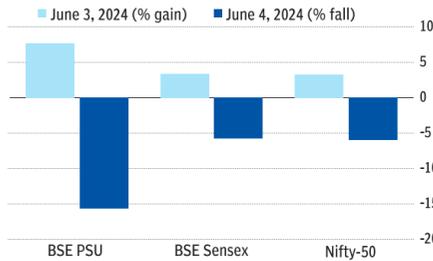
STATISTALK.

Compiled Sai Prabhakar Yadavalli | Graphic Visveswaran V

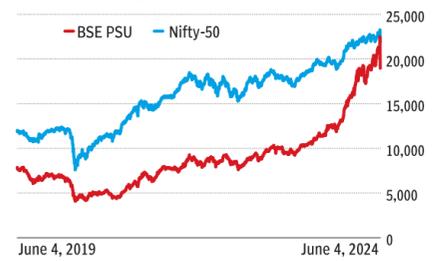
Jitters on policy continuity for PSU stocks

A long drawn election process has come to a close and its most immediate impact has been on equity markets. But within sectors, it was PSUs that witnessed the highest declines in the day. In the last five years, these stocks gained from higher capital expenditure, logistics upgradation, defence spending and power infrastructure upgradation. With an overhang on policy continuity, these stocks shed around 20 per cent on Tuesday. We look at the gains made by PSUs in the last one year, last five years compared to the day's loss on June 4

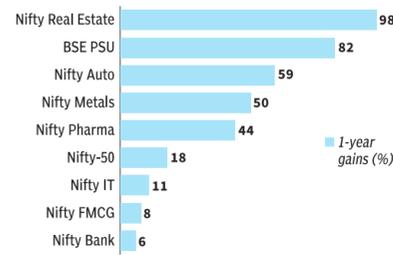
Markets take a turn for the worse led by PSU index



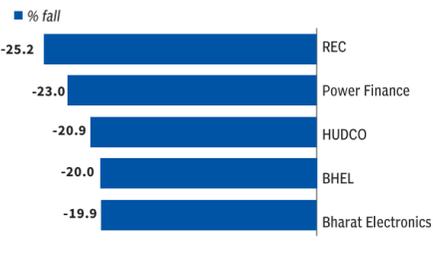
BSE PSU playing late catch-up....



.....gaining predominantly in the last year



Top losers in PSU for the day on June 4 (% fall)



thehindubusinessline.

TWENTY YEARS AGO TODAY.

June 5, 2004

I&B Ministry not to allow IHT publication

The Information and Broadcasting (I&B) Ministry has decided not to permit the publication of *International Herald Tribune* (IHT) by the Hyderabad based Midram Publication Private Ltd. Sources in the I&B Ministry said that the publication of IHT violates the norms prescribed for syndication arrangement by newspapers.

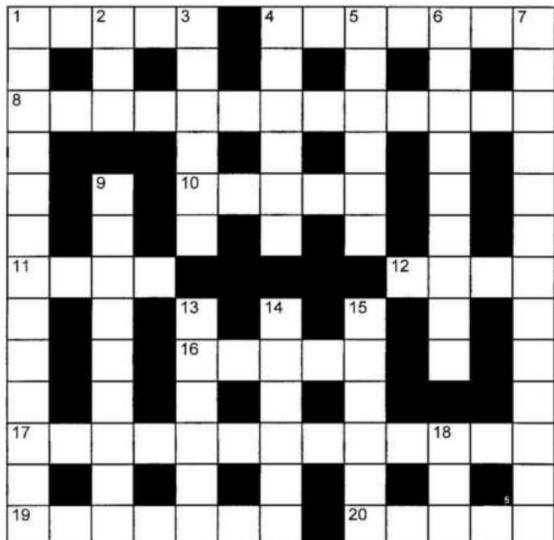
Ministry unlikely to roll back FDI cap on airports revamp

The Ministry of Civil Aviation is unlikely to roll back its decision of capping foreign direct investment at 49 per cent for modernisation and restructuring of the airports at Delhi and Mumbai. Sources indicated that while the GoM had fixed the upper limit for the FDI cap at 74 per cent, it had left it to the Ministry of Civil Aviation to decide at what level the FDI cap should actually be fixed.

Dabhol lenders' talks remain inconclusive

Talks between Dabhol Power Company's Indian and foreign lenders over the price at which the former will buy out dollar-denominated loans remained inconclusive for the second day in a row. The Indian lenders will meet the foreign lenders again on June 24, a source close to the negotiations said.

BL TWO-WAY CROSSWORD 2454



EASY

ACROSS

- Add too much water (5)
- Of miscellaneous contents (7)
- The very latest (2,2,3,6)
- Allotropic form of oxygen (5)
- Male bird (4)
- Pedigree (4)
- Made sheep's eyes at (5)
- Town intersections (6,7)
- Swell, stretch apart (7)
- Raise objection (5)

DOWN

- Cheated one's own side (6-7)
- Dismissed (3)
- Idea, thought (6)
- Fairy king (AMND) (6)
- Pinned (6)
- Made clumsy mistake (9)
- Type of racehorse (13)
- In reverse (9)
- Stick together (6)
- Calm, unruffled (6)
- Loved intensely (6)
- Variety of 12 (3)

NOT SO EASY

ACROSS

- In heartless racket, move boat only to lose one's life (5)
- The bus is full (7)
- How second-hand comes to be new (2,2,3,6)
- 'Dream' character gets award with no alternative backing (6)
- Tip hat and prepare to fire gun (4)
- The ash that may be found in a boot (4)
- To go back gave rise to having looked at it greedily (5)
- Inner city areas have them at right angles (6,7)
- Set in confusion in high degree, spread out all round (7)
- Through uncertainty hesitate to enter shade murky shown (5)

DOWN

- One just like one went over and betrayed one (6-7)
- The way to leave that is no longer acceptable (3)
- Thought it was twelve o'clock when about to give it up (6)
- 'Dream' character gets award with no alternative backing (6)
- To be unwell in the wrong end and get fixed (6)
- Made a big mistake in having floundered about (9)
- The high point for an engraver is a sort of horse (13)
- Give support to electoral divisions in reverse (9)
- In this place first business concern will be consistent (6)
- Calm police constable laid out (6)
- Loved a party, but got embarrassed (6)
- It grows, even lacking mineral starters (3)

SOLUTION: BL TWO-WAY CROSSWORD 2454

ACROSS 1. False 4. Glutton 8. Astounded 9. Run 10. Holster 12. Silo 14. Hopeful 17. Teal 18. Serpent 20. Tar 21. Home-grown 23. Hatched 24. Tares
DOWN 1. Feather-stitch 2. Little 3. Equation 4. God 5. Undo 6. Torrid 7. Non-combatants 11. Reeks 13. Outright 15. Carrot 16. Devour 19. Shah 22. Mad

How 2024 was never a done deal

The exit pollsters owe us an apology, and so does the Congress to the Election Commission

Many articles, and even books, were written about the expected "Modi victory of 2024" before the elections got fully underway, but we can now confirm that they were substantially wrong. With hindsight, we can say that 2024 was never a done deal for the Bharatiya Janata Party (BJP), given the broader social and economic problems that remained unsolved, particularly unemployment and rural economic weakness. So, however much the markets may have hoped for stability in politics and economic policy, that is not going to be the case.

To retain power, the BJP will now be dependent on regional allies like the Telugu Desam Party and the Janata Dal (United), with the latter being written off by most observers before polling started. Worse, they may be in a position to bargain with the other alliance too. Chandrababu Naidu, Nitish Kumar, Mamata Banerjee, M K Stalin, and Akhilesh Yadav are now the most powerful regional politicians with whom all parties vying for power in Delhi will have to make deals.

The biggest loss of face is for Narendra Modi, who far from achieving his 370+ seats for the BJP (and 400-paar for the National Democratic Alliance or NDA), has not been able to obtain even a simple majority for his party. There is little doubt that the Prime Minister's own charisma exceeds that of his party, but 2024 is proof that no party can ultimately depend on one person to deliver victory all the time. The Congress party discovered this with the Gandhi family over the last decade or even earlier, and the BJP will be smart to reckon with this reality too. It needs more than one supreme leader to stay in touch with the electorate, and this logic applies to regional leaders too. Democracy may sometimes favour strong leaders, but when the time comes,

the voter is willing to take the risk and vote for change.

The bad news, if one can call it that, is that the politics of anti-incumbency has now replaced the pro-incumbency of recent years, and freebie politics may again take centre-stage. The BJP, after resisting giveaways this time, may reckon that it has paid a huge electoral price for it, and will be more open to this form of voter enticement in the years ahead. More so, if its allies keep pushing it in that direction.

The defining trend this time is anti-incumbency. The BJP has lost seats in many of the states where it had maxed out in 2019, including Uttar Pradesh, Haryana and Rajasthan. Where it has retained its strengths are in Madhya Pradesh, Gujarat, Chhattisgarh, and the smaller states of Uttarakhand and Himachal Pradesh, the last of which has given a split verdict in the Lok Sabha and Assembly by-elections. The BJP won all Himachal seats in the Lok Sabha, but lost out to the Congress in the Assembly bypolls.

Apart from Uttar Pradesh, the biggest damage suffered by the BJP was in Maharashtra, where the engineered splits in the Shiv Sena and the Nationalist Congress Party have not only not paid off, but its allies have been humbled. The BJP would perhaps have fared better if it had not gone in for these unprincipled alliances. On the plus side, anti-incumbency has also helped the BJP in Odisha, where it has dethroned Naveen Patnaik, and in Andhra Pradesh, where its regional allies have won the day.

With the Opposition outside the ruling alliance at its strongest since 2014, the political pressures will increase, not least because three major states will go to the polls later this year, including Maharashtra, Haryana and Jharkhand, and two others (Bihar and Delhi) next year. The BJP will be facing a spirited Opposition in at



BEYOND IDEOLOGY

R JAGANNATHAN

The coalition reset

The new govt must adopt a consultative approach

The biggest takeaway from the results of the 18th Lok Sabha elections is that no election in India is a done deal till the last vote is counted. Proving most exit polls wrong, the results have clearly shown elections in India remain as competitive as ever. It's also noteworthy that while the campaign was long and became bitter after the initial rounds, which should have been avoided, casting aspersions on the election process and questioning the electronic voting machines were unnecessary. Although the outcome will be analysed for days and weeks to come, at the time of going to press, the Bharatiya Janata Party (BJP) had won or is leading in 240 seats and is short of the majority mark. The BJP-led National Democratic Alliance (NDA) is, however, in a comfortable position to stake claim and form the next Union government. India will get a coalition government after a decade.

In important states that went to the polls simultaneously with the Lok Sabha elections and where the results were declared on Tuesday, the NDA made big gains and managed to defeat the incumbents. In Odisha, the Biju Janata Dal, which was in power for 24 years, lost, with the BJP winning about 80 seats in a 147-member state Assembly. In neighbouring Andhra Pradesh, the N Chandrababu Naidu-led Telugu Desam Party, which is part of the NDA, swept the Assembly polls and was in a comfortable position to form the next state government. At national level, while the BJP broadly retained its vote share, it could not hold on to the 2019 tally. The Congress, on the other hand, improved its vote share by about 2 percentage points and nearly doubled its seat tally. The BJP made inroads in states like Odisha, but it lost ground in the so-called Hindi heartland, particularly in Uttar Pradesh. Further, given the tally in Haryana and Maharashtra, it will be worth watching what happens in the Assembly elections in these two states due in a few months.

On the economic front, while many believe a coalition government can slow the reform process, which was reflected in the sharp drop in benchmark stock-market indices, it is worth remembering that the economic-reform process was started in 1991 by a minority government and followed up by successive coalition governments till 2014. Greater consensus building will now be required, which may inevitably delay some decisions but will have greater political acceptability. Further, it will also be important to take states on board to push economic reforms. Cooperation between the Centre and the states in the Goods and Services Tax Council had given hope that both levels of government would be able to take the reform process forward in other areas

India now has a strong Opposition after a decade and it will be important for both the Treasury and Opposition Benches to respect each other's positions

as well. But this clearly didn't happen. The next Union government would thus be well advised to revive the institutional mechanism, perhaps through the NITI Aayog or by devising a new process, to cooperate with states on policy issues. This will help push long-pending reforms in areas, such as land, labour, and agriculture. Notably, India now has a strong Opposition after a decade and it will be important for both the Treasury and Opposition

Benches to respect each other's positions.

As things stand, the broader economic parameters are favourable. The Indian economy expanded by 8.2 per cent in 2023-24, the third consecutive year of 7 per cent or above growth. The outlook for the current year is also favourable and forecasters expect the economy to expand by about 7 per cent, supported by a normal monsoon. The inflation conditions have improved, while the banking and corporate balance sheets have strengthened significantly over the past few years.

However, technically, it's worth highlighting that growth in recent years has been driven largely by higher government expenditure, which has limits. While the government will be in a comfortable fiscal position this year, it will have to consolidate its finances. It will thus be important for the private sector to fill the space vacated by the government to sustain economic growth. The private sector thus far has been reluctant to increase investment significantly, partly because of weak private consumption. One of the reasons for weak consumption is the nature of India's job market. While the headline unemployment rate has been declining, most people are engaged in low-productivity occupations like agriculture or are self-employed, running very small enterprises.

Pre-poll surveys also clearly indicated that employment was one of the biggest issues among voters. Further, the results also raise questions about the limits of schemes like distributing free food grains in the absence of productive employment for India's rising workforce. To address the employment issue, it will be crucial for the next government to push manufacturing, which can absorb a large number of low-skilled workers. Aside from domestic demand, India will have to focus on merchandise exports, which will require a thorough review of the trade policy. Higher tariffs are incompatible with the country's participation in global value chains, which is essential to push exports and generate employment. While a lot will now depend on the new government's composition, structure, and stated programme, it will certainly benefit from improving capacity in economic policymaking and increasing consultations.

Governance challenges for a coalition

With the electoral results indicating that the era of coalitions may be back and that Narendra Modi's Bharatiya Janata Party (BJP) is unlikely to form a government on its own, the political economy debate in this country should once again be focused on the governance model that should be followed by the new regime at the Centre. Even as a majority government, the Modi regime in its last two terms often promised a revamp of civil services to make the administration more efficient, governance restructuring to ensure that both the states and local governments become more effective, and factor-market reforms to increase the ease of doing business with simpler and more friendly laws on land, labour and the farm sector. However, the strength of a single-party majority notwithstanding, the outcome on all these fronts has not been encouraging. Will a coalition government in 2024, even if led by the BJP, deliver better results?

This is not because the Modi government did not have the political capital to carry out these far-reaching changes in the country's overall governance model. No other government since Rajiv Gandhi's in 1985 has enjoyed such a clear single-party majority in the lower house of Parliament. It seemed that the BJP leadership was a little reluctant to risk its political capital for such economic reforms, and evidently focused more on its political agenda of rendering Article 370 inoperative in Jammu & Kashmir, or introducing the citizenship amendment law, or embarking on a highly disruptive plan like demonetisation. When it came to hard economic reforms like rationalising the multiple rates under the goods and services tax (GST) regime, or privatising non-strategic state-owned enterprises, for which even a policy had been approved, there was hardly any progress. Air India figures as the only case of privatisation under Mr Modi's 10 years of rule at the Centre.

To be fair, the Modi government did succeed with many reforms, like the setting up of an inflation targeting monetary policy regime with the help of the Reserve Bank of India, launching an insolvency and bankruptcy resolution system, introducing GST all over the country, creating a regulatory system for the real estate sector, and improving the digital public infrastructure to deliver benefits to citizens across states. It also tried to reform land, labour and farm laws. However, the laws regarding labour and the farm sector met with stiff political resistance and even a majority government like that of Mr Modi decided to roll them back. On labour law reforms, the simplified four labour codes were passed by Parliament, but the Centre has so far failed to get all the states on board.

If Mr Modi begins his third successive term as Prime Minister, but only as the head of a coalition, what are the chances that any of these long-pending economic reforms will be implemented? Sadly, the BJP's election manifesto, released before the 2024 general elections began, offers little hope. The manifesto makes no mention of reforms of land and farm sector laws, which had to be rolled back in Mr Modi's first and second terms, respectively. On labour law reforms, there is no indication if the newly elected government would renew efforts at bringing sections of trade unions that are still opposed to the changes and persuading all the states to come on board to enforce the new codes. Worse, with the government critically dependent on its coalition partners for survival, it may not embark on such reforms. In the past, coalition governments have been able to bring about such reforms only when the economy is facing severe constraints. There is no such crisis at present for a coalition government to push for such reforms.

It is, of course, not necessary that the new government cannot implement these basic factor-market reforms if these are not part of the BJP's election manifesto. It can implement them even without the support of the manifesto, provided there is a solid performance-oriented team of ministers who could show the political resolve and economic intent to carry out these reforms. The BJP manifesto talks about making India a global hub for almost a dozen industries like food-processing, defence, railways, aviation, ship-building, pharmaceuticals, electronics, semiconductors, automobiles, electric vehicles, strategic minerals, textiles and diamonds. If such investment ambitions have to be realised, the Modi government in its third term needs to have ministers in charge of industrial development, who should embark on land and labour reforms, push for early enforcement of labour codes, and take advantage of fresh reforms in taxation laws, which incidentally has been promised in the manifesto. That path is likely to yield better results, instead of pursuing import substitution goals with the help of higher tariffs and relying on government subsidies that drain the Central exchequer's resources. But chances of such reforms from a coalition government will once again be remote.

There is no gainsaying that such reforms will be critical for the economy. India's buoyant economic growth in the last three years has been largely supported by a massive investment in infrastructure by the government. Economic growth in the coming years can be sustained at a decent level only if the pace of investment from the private sector picks up. And reforms that improve the ease of doing business in the country can certainly help revive such private sector investment. At the same time, this strategy

least four of these states, and will have to look for new allies and new policies to retain its perch.

The big winners in 2024 are the Congress party, which has made gains in the Hindi heartland, and the regional parties in their strongholds. The only regional parties that lost out were the Biju Janata Dal in Odisha (not surprising, given Naveen Patnaik's age and 24-year-long tenure as chief minister), and the Bharat Rashtra Samithi (BRS) in Telangana. The BRS got too big for its boots in 2023, when it set its sights on Delhi, even though its regional base was far from secure. It has now been decimated, with the BJP making gains at its cost.

Elsewhere, the Trinamool Congress in West Bengal, the Telugu Desam in Andhra, and the Shiv Sena (Uddhav Thackeray) and NCP (Sharad Pawar) in Maharashtra have come into their own on the back of the BJP's ineptitude.

The Bahujan Samaj Party, which had a base in Uttar Pradesh but was never a purely regional party, seems to be fading out. This has huge implications for Dalit politics in Uttar Pradesh and elsewhere. This group is looking for new leadership and all regional parties, as well as the Congress and the BJP, will be hoping to make inroads. As an aside, one can suspect that the Congress's big allegation, that the BJP may end reservations and quotas, may have played a part in the party's big losses in Uttar Pradesh. The Dalit vote played a major role in the BJP's poor show in Uttar Pradesh this time.

From the leads and wins available till the evening of June 4, it seems that the BJP was not weak enough to lose, and the Opposition not strong enough to win. This suggests that the NDA has to run its next government like a heterodox coalition, and not as a majority-led party. It may not be good for stability in politics or economics, but it reaffirms India's extreme diversity, where unity will always be tough to achieve.

For Narendra Modi and his party, this will be more than a sobering outcome. The message the voter has sent is clear: No leader is bigger than the electorate.

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RAISINA HILL

A K BHATTACHARYA

The game is on



NATIONAL INTEREST

SHEKHAR GUPTA

then, before we go into a deeper analysis of these and other take-aways, list four rants too.

The three outcomes first.

The first, that Indian politics has returned to its default post-1989 pattern of coalitions after a decade's interregnum. Second, the Bharatiya Janata Party (BJP) under Narendra Modi looks beatable. And third, the Congress, with a tally close to 100, has revived. A short break for my rants now.

■ All those who said India's democracy is dead and buried, over, that we are no-hopers under fascist rule, please sit down, take and drink Kool-Aid. You can gulp a beta blocker with it if you think you need it. But consult your doctor first.

■ All those who said India's voters are now such polarised, fried-in-desi-ghee Hindutva nuts that they will keep voting against Muslims, and thereby for Narendra Modi, please say sorry

to the 642 million people who went out to vote in an almighty heatwave. Also check that the BJP is trailing in Ayodhya (Faizabad).

■ The third is the most important and I should have probably put it first. Promise yourself in future never to undermine the credibility of the election system in India: Whether it is the electronic voting machines, the institution of the Election Commission and the election commissioners, the personnel who toil at making this marvel possible. Peacefully, calmly and credibly. The Indian election system is a global, public common good. Never knock it. For perspective, held at the same time as India's, the Mexican elections saw 37 candidates assassinated. Not one was harmed here. Mexico's per capita income is nearly four times India's.

■ And the last, a request to bankers, investors, fund managers as this is also simultaneously published in *Business Standard*. Look at the market convulsions. Please promise, especially those millions who trust you with their hard-

earned money, never to let your voting preferences determine your actions on the markets. Political analysis, I agree, has a heady sex appeal. But it carries risks to your reputations and your investors' money. So leave it to people like us. We aren't as smart as you, but we have that one attribute an innocent and impassioned may not: Healthy political scepticism. The most appalling and scary phenomenon I noted in this campaign was fund houses and brokerages going out on election yatras and writing copious reports promising more than 300 for the BJP. That was your wish as voters. Your investors are paying for it now.

Rants over, we return to politics. This verdict signals the return of normal politics. The stage is now set for the next battles: The state elections of Maharashtra, Haryana, and Jharkhand. Just after that, hold your breath, Jammu & Kashmir, where the BJP got only two out of the six. For each, this result has a dire warning for the BJP. In Maharashtra, its

number is less than half of what it was in 2019 although it had one more ally (Nationalist Congress Party).

More important, both the allies, or the breakaway factions it prised away from the originals, are now dead in the water. The Maharashtra voter has made it clear that she sees the originals as the real Shiv Sena and NCP. The BJP is now in an unfamiliar situation of having to shore up its own defences as the MLAs on Shinde-Shiv Sena and Ajit Pawar-NCP weigh a home-coming threat to the BJP.

If Maharashtra is the biggest prize a rejuvenated Opposition would seek, Haryana is a direct threat to the BJP. In 2019, it swept all 10 seats in the state with a 58.2 per cent vote. Now it's lost five to a rising Congress. The last-minute chief minister change bombed. The prospect of losing a state next to Delhi would worry the BJP.

In the third major state headed for polls, Jharkhand, the equation has now changed. Against the sweep of 2019, when it won 11 out

of 14 seats, the BJP has now lost three, all to the Congress-JMM coalition, all in tribal areas.

If this momentum continues, the coalition will see a chance of bucking anti-incumbency. Of course the BJP will probably review the wisdom of keeping Hemant Soren in jail.

These three state elections will be the lung-opener as a new Indian Political League begins after Parliament is constituted. Pace will be relentless as just the capital. Again, the wisdom of keeping Arvind Kejriwal and Manish Sisodia in jail will need to be reviewed. Linked to that, what does the new government do with the two jailed "radicals" — Engineer Rashid and Amritpal Singh — who've won with huge majorities in Baramulla and Khadoor Sahib, respectively!

From politics, we shift to governance. First of all, there is zero doubt that a BJP-led coalition will have Narendra Modi as Prime Minister. But this won't be a BJP but an NDA government, and Cabinet.

This hasn't been the case for a decade. In fact, most of the time the two Modi governments did not even have an NDA Cabinet minister besides the late Ram Vilas Paswan. Doctrine of necessity and survival will now make the BJP concede spaces to allies, especially Chandrababu Naidu. Prepare also for renewed demands from both Naidu and Nitish for special status for their states. They now have leverage.

Odisha is much more a consolation win for the BJP. It is their first win in the state and also with a clear majority. For one seen as mostly a "heartland" party, it is also another coastal state, the first in the east. But its ambitious southern march is stopped, favourite target Mamata Banerjee is stronger and the losses in Manipur, Nagaland, Meghalaya threaten it with a Congress revival there.

Actually, the upshot of this verdict can be stated in just two words: Game on.

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OPINION

The
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{ OUR TAKE }

India sends the BJP a message

The results suggest that the party has the backing of a majority of voters, but people would like it to change some aspects of its behaviour and policies in government

In 2014, after a 30-year gap, the Bharatiya Janata Party (BJP) became the first party to cross the halfway (majority) mark in the Lok Sabha with 282 seats. In 2019, it bettered its performance, winning 303. This time, it has won 240, and is dependent on fickle allies such as Nitish Kumar's Janata Dal (United), and N Chandrababu Naidu's Telugu Desam Party to reach that mark. With 36.60% of the vote, it remains the single largest party, in terms of both seats and vote share, by a distance — the Congress, with 99 seats comes second, and it won 21.20% of the votes — but the BJP will likely see Tuesday's outcome as sub-optimal. As it should — and not only because of the targets it set for itself (370) and the larger National Democratic Alliance (400-plus), *Char sau Paar* (beyond 400) was the rallying cry, but as it turned out, the alliance didn't even cross 300.

The result is the straightforward outcome of the BJP's performance in the three states that send the most representatives to the Lok Sabha. In Uttar Pradesh, which sends 80, it won 33 to the Opposition INDIA bloc's 43, its worst performance since 2009 (it won 62 in 2019) — the result of anti-incumbency (the BJP has ruled the state since 2017), a consolidation of the Muslim vote, and smart candidate selection by the Samajwadi Party that may have helped it rebuild its Other Backward Classes (OBC) base. In West Bengal, which sends 42, it won only 12, compared to the 18 it won in 2019, with Mamata Banerjee's Trinamool Congress holding its own and managing the rare feat of repeating its showing in the 2021 assembly elections in the national elections. And in Maharashtra, which sends 48, with allies it won 18 to the INDIA bloc's 29, with its successful efforts to split the Shiv Sena and the Nationalist Congress Party not really working to its advantage. Of these 170 seats, the BJP-led NDA won only 66 this time, compared to 123 in 2019, and in some ways, the story of its overall performance, is the story of these three states.

There are two ways in which the BJP, which will now need the support of allies — the larger NDA alliance won 293 seats, comfortably above the majority mark of 272, and 44% of the vote to be in a position to form the government (to be sure, the rival INDIA bloc says it is reaching out to some NDA constituents, but that is in the realm of the hypothetical) — can interpret these results.

One, it could attribute the Opposition's strong showing to the grouping's success in selling the narrative that the BJP could take away the benefits of reservation for backward classes and Dalits, a consolidation of the Muslim vote, local issues trumping national ones, perhaps even an international conspiracy funded by inimical forces from outside the country (like those that came before it, the Modi government hasn't been averse to blame the foreign hand). Some of these are indeed plausible explanations for its showing.

Or two, it could see the loss as the result of disenchantment among sections of voters arising from a variety of factors: Excessive and exaggerated attempts to polarise the electorate on the basis of faith; economic distress on account of a K-shaped recovery post Covid-19; an almost cynical approach to politics that has meant a dilution of its ideological position to take in defectors; and an effort to enforce its will on states ruled by other parties, usually with the help of pliant governors. And some of these too, are plausible explanations for its performance.

The BJP's track record suggests it will prefer to pick the first set of reasons, but despite the overwhelming temptation to do so, the party would do well to also evaluate the second. The results of this election suggest that India (the country, not the alliance) is sending the BJP a message, with the numbers indicating that while the majority still believes in the party, people would like it to change some aspects of its behaviour and policies. Speaking of temptations, the option of even more cynical politics may look attractive to the party at this point in time, but, in the interests of not just the country but also of the party, the BJP would do well to overlook this. Just as it would do well to celebrate its growing footprint in the South; it now has a 10% share of votes in Tamil Nadu and a 16.68% share in Kerala.

A quick note on the Congress and the Opposition, especially the TMC and the SP. The first has reinvented itself; the second has staved off a challenge from what seemed like a superior force; and the third has perhaps set the template for post-Mandal social justice parties — and each of these perhaps warrants a separate editorial (and will get one, over the next few days).

Finally, despite all the scare-mongering about EVMs and possible efforts to steal the elections, the results show that India's electoral democracy remains vibrant. And as the BJP has discovered, it is also one that knows how best to use votes to send a message.

Looking back before looking ahead in 2024

Three things stood out during the campaign: Rising unemployment, divisive political rhetoric, and the decline of institutions. The next government must address these concerns

Be fitting a general election that stretched interminably across 46 days from the first polling date to the final day of reckoning, the proliferation of narratives that marked the 2024 Indian general election can fill this entire newspaper. The election was a coronation for a beloved Prime Minister, a seat-by-seat scramble for votes, a desperate stirring of the communal pot, and an attempt to defend the constitutional guarantee of reservation. Which ever plot you favoured at the time, the outcome deviates sharply from the one most experts had predicted before a single vote was cast: The Bharatiya Janata Party (BJP) has emerged as the single largest party in the Lok Sabha but is heavily reliant on its National Democratic Alliance (NDA) partners to form the government — a major break from both 2014 and 2019.

India is a country in a hurry to move forward and few people will waste time looking back. Already, journalists are speculating about who will feature prominently in the new coalition government, markets are attempting to divine the new government's policy priorities, and special interests are prepar-

ing their "100-day agendas." Nevertheless, it would be unwise to shift gears without adequately reflecting on what the recent campaign has taught us. Three takeaways stand above all others.

First, despite the glossy headline numbers trotted out to tout the Indian economy, ground realities tell a different story. For years, economists have been warning of a "K-shaped" recovery in which the haves prosper while the have-nots struggle to stay afloat. The significant dip in the BJP's tally suggests that the *aam aadmi* is not satisfied with the status quo. While a plurality of Indians may believe that Modi remains best equipped to ease the plight of ordinary Indians trying to plug into an economy that selects for skills they do not possess and struggle to acquire, their faith appears rattled.

Recently released government data reveal Gross Domestic Product (GDP) growth of 7.8% last quarter, a pleasant surprise. But Gross Value Added (GVA) growth — a better proxy of underlying dynamism — has continued to slide, from 8.3% three quarters ago to 6.3% last quarter. If Rahul Gandhi's 2015 "suit-boot ki sarkar" jibe jolted the government into fashioning a "new welfarism", the resonance the Opposition has found in highlighting the country's two-speed economy should force the government to rethink its broader approach. Generous welfare provisioning has provided a floor for the less fortunate, but it has not created a springboard for upward mobility. The government should pivot from the public provision of private goods to improving the quality of public

goods — education and health above all. It must also better align trade policy, subsidies, and factor market reform to invigorate labour-intensive manufacturing capable of creating jobs at scale. This is especially dire in the context of a worrying youth unemployment rate.

Second, the divisive rhetoric employed by ruling party star campaigners and social media accounts — including the prime minister himself — has deepened societal wounds that will not easily heal. For the past decade, BJP supporters have rebutted criticisms that its "Hindu-first" approach is intended to marginalise religious minorities. This is not about *badla* (revenge), they say, but the *izzat* (respect) of one hundred crore Hindus.

The PM's communally-tinged campaign rhetoric — with its references to "infiltrators," an unnamed community "that has more children," a nefarious conspiracy to snatch the mangalsutra of Hindu brides, and enigmatic "Mughal plots" — reveals that such arguments are naïve at best, or disingenuous at worst. The fact is that the relentless mobilisation of majoritarian sentiment for political gain requires the constant demonisation of an "other", in this case, Muslims. The BJP, and the Sangh Parivar more generally, have always prioritised two key objectives above all others: Religious nationalism and economic uplift. The realities of the BJP's newfound coalition dharma will perhaps act as a check on majoritarianism.

Third, the decay of referee institutions designed to promote government accountability and ensure a level play-



It is no secret that accountability institutions in India tend to bend to the will of the executive during periods of prolonged political dominance HT

field for incumbents and challengers alike is a longstanding concern. But the lacklustre performance of the Election Commission of India (ECI) only intensifies these anxieties. From the curious timing and phase-wise arrangement of the elections to the studied silence in the face of obvious infractions of the Model Code of Conduct and the bizarre controversy over publishing basic voter turnout data, ECI has done self-harm to its well-earned reputation for competence and independence.

It is no secret that accountability institutions in India tend to bend to the will of the executive during periods of prolonged political dominance, be it the Congress of yesteryear or the BJP of today. But one does not need to be an electronic voting machine conspiracy theorist to recognise that decreasing levels of confidence in the agency entrusted with ensuring free and fair elections could inflict lasting damage on the body politic. One silver lining of this election is that referee institutions like ECI, which have exhibited excessive deference to a domineering ruling party, might enjoy more space to assert themselves under a coalition setup. Parties of all stripes must

recognise that, in the end, the credibility of referee institutions enhances the credibility of the eventual election winner.

One year after Modi captured national power in 2014, a BJP official sketched out their newly elected leader's 15-year vision in a private conversation. When BJP *karyakartas* (functionaries) campaign for Modi in 2019, he explained, they will compare his first term to the record of the recently departed United Progressive Alliance (UPA) government. And when they rally behind him in 2024, party workers will measure Modi's 10-year record against the promises he made in 2014. And by the time 2029 approaches, the party faithful will compare Modi to history. With a third consecutive NDA victory, however, diminished the tally, Modi can rest assured that his place in the history books is secure. But how favourably posterity portrays the PM will turn out what the next five years hold.

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Compounding India to prosperity in new term

Prime Minister Narendra Modi returns to office at a particularly important stage in India's economic trajectory when the compounding process of growth will begin to generate extraordinary results. Most readers will be familiar with the concept of compounding but, even the mathematically adept, tend to underestimate its power. Therefore, a bit of history is in order.

When India began to reform its economy in 1991-92, its GDP amounted to just \$270 billion in nominal terms. It then took 16 years for the economy to cross the \$1 trillion mark for the first time in 2007-08. The next trillion dollars were added in just seven years when GDP crossed \$2 trillion in 2014-15. Another trillion should have been faster but two years were lost in the Covid-19 pandemic; the \$3 trillion milestone was crossed in 2021-22. Then, with the economy recovering strongly in the post-Covid period, India's GDP took a mere three years to add the next trillion and is expected to cross \$4 trillion in 2024-25.

Unless there is a major unexpected shock, India's economy will add the next trillion dollars in a bit more than two years. When India crosses the \$5 trillion mark, it will have bypassed Japan and Germany to emerge as the world's third-largest economy. If we manage to just maintain our current pace for a generation, India's GDP would reach the \$29-33 trillion range by 2047.

Even as India's GDP has grown, its share of the world economy has increased. In order to correct for distortions from relative prices and exchange rates, this is best understood in purchasing power parity (PPP) terms. In 1980, the US was the world's dominant economy with a 21% share of world GDP in PPP terms. India's share was just 3% and China, after the chaos of the Mao years, was down at 2.3%.

Improved policies in China from the 1980s, and in India from the 1990s, led to better performance. China's share jumped to 7.2% by 2000, and it equaled the US's share of 16% in 2017. Today, it accounts for 19.4% of the global economy, the world's largest economy in PPP terms. The US is still the world's largest economy in nominal dollar terms but in PPP terms its share is now down to 15.5%. Meanwhile, India's share has risen from 4.3% in 2000 to almost 8% in 2024. This is not only the third largest but is already more than half the size of the US economy in PPP terms!

Despite the recent growth performance, India remains a poor country with per capita income at a mere \$2,750 in nominal terms, and \$10,100 in PPP terms (IMF estimates). But note



Even as India's GDP has grown, its share of the world economy has increased AFP

that China was at similar levels just 16 years ago in nominal terms, and a mere 12 years ago in PPP terms. The point is that the gap is the result of compounding. With India now growing at a faster pace than China, closing the gap is mostly about sustaining the compounding process.

India's GDP grew by a remarkably strong 8.2% in 2023-24 and is expected to grow by 7% in 2024-25. This is the fastest pace of any major economy. Some economists have recently suggested that India enjoys strong growth just because it is poor and is "catching-up". This is plainly misleading: India was even poorer in the 1960s and 1970s but did not witness high growth. There is nothing preordained about growth and every step needs to be earned. Policies matter, and sustaining the compounding process over decades will need continuous effort.

The first focus area for the incoming government would be to keep enhancing the supply-side of the economy. This requires continued investment in hard and soft infrastructure, improvements in ease-of-doing-business, process reforms, and, most importantly, structural reform of the administrative and legal systems. No amount of demand pumping can substitute for supply-side improvements. Moreover, this should be done across all sectors. There is no reason to abandon the manufacturing and construction sectors on the misplaced idea that an exclusive focus on services will create the necessary jobs.

Second, policymakers must remain conservative on macro-stability. Over the last decade, India has cleaned up its banks, anchored its inflation, accumulated a pile of foreign exchange reserves (currently \$648 billion), and kept external debt well within manageable limits. Despite the unavoidable spike during the Covid-19 pandemic, the fiscal deficit is now steadily coming down. This is no small turnaround for a country that was considered one of the "fragile five" a decade ago. Macro-stability is crucial for sustaining the compounding process over long periods. The Asian Crisis of 1997-98 derailed several Southeast Asian countries that were once considered "tiger economies". They never quite recovered their momentum.

Third, policymakers should remain focused on the eradication of absolute poverty (i.e. *antyo-daya*) and not get distracted by western debates about "inequality". This will require targeted support for the poorest segments through direct benefits transfer, safety nets, mission-mode schemes (especially for health/skills) and so on. This is a fundamentally different approach from the western "inequality" approach that gets caught in the quagmire of inheritance tax and wealth tax. Many of these ideas were tried in India in the past and had to be abandoned. Indian policymakers should never again fall into the old trap of trying to redistribute poverty.

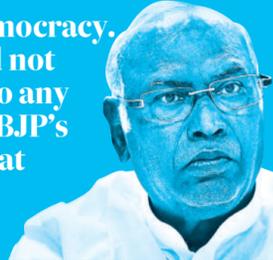
To conclude, India's economy has now reached a critical mass where the compounding process can dramatically enhance both per capita income as well as sheer bulk. The game is to sustain this process over a generation without getting distracted. In turn, this will require supply-side reforms and investment, macro-stability prudence, and direct efforts to eradicate absolute poverty.

Sanjeev Sanyal is member, Economic Advisory Council to the Prime Minister. The views expressed are personal

{ MALIKARJUN KHARGE } CONGRESS PRESIDENT



This is the victory of democracy. This time the people did not give absolute majority to any single party. This is the BJP's political and moral defeat



Why and how the BJP's tally fell short of its target

The sheen of the Bharatiya Janata Party (BJP) juggernaut is wearing off. A few days ago, the exit polls suggested the BJP would romp to victory with margins rarely seen and a tally (with coalition partners) of more than 400 seats, and in places where it had never been particularly competitive. As those results trickled in, it became clear that those exit polls were far too optimistic — a bit of hubris by pollsters making declarative statements about how voters think.

The anatomy of the BJP's purported victory rested on two principles. First, while there was visible anti-incumbency and frustration with the BJP in parts of the Hindi belt, the party was to use its traditional advantages in the region, alongside Hindu-Muslim polarisation to minimise its losses. Concurrently, the BJP was to break into "vernacular states" outside of the Hindi belt in a big way — particularly in the South — to more than offset any losses in the North.

The challenge of explaining the 2024 election is to derive an overarching claim when the results show extraordinary regional variation. The truth is that the BJP lost a significant number of seats in a small number of important states due to myriad reasons. A close look at the numbers can help us understand how it fell below the majority mark for the first time in 10 years.

In 2019, the BJP managed to win 303 seats across India. Of these, 180 came from just six states: Bihar, Gujarat, Madhya Pradesh, Maharashtra, Rajasthan, Uttar Pradesh. These seats also accounted for nearly 70% of the BJP's seats in the 2014 election. Big electoral performances for the party were thus contingent on the spatial concentration of its support. In addition, it expanded its footprint in 2019 by winning 18 of 42 constituencies in West Bengal and 25 of 28 seats in Karnataka. This time, the BJP has won only 208 of its 303 tally in 2019 (69%) — a very strong performance in these seats, but far from the dominance it demonstrated in the last two national elections.

The first major sites of erosion are Uttar Pradesh and Rajasthan, where the party won a total of 86 seats in 2019. This time, it won just 47 seats in the two states. It lost five in Haryana (where it had won all 10 in 2019). For the last several years, farmers — particu-

larly from the Jat community — have taken to the streets in and around Delhi, initially in the wake of controversial farm laws promulgated in 2020. The protests forced the Union government to walk back from the laws, but the electoral impact was evident. These three states are all around Delhi, with significant Jat populations and demonstrable rural distress.

The second major site of erosion was the states where the BJP had expanded its footprint in 2019: West Bengal and Karnataka. It had won 43 seats in these two states then, but this time, the number dropped to 26 — although it is worth noting that the BJP gave up three seats in Karnataka for its alliance partner, the Janata Dal (Secular), or JD(S).

Here, support eroded because of formidable political competition at the state level. Mamata Banerjee's Trinamool Congress (TMC) first showed the limits of the BJP's expansion plans in the 2021 West Bengal election, with the TMC romping to a score of 213 out of 294 seats. The TMC has consistently outperformed the BJP in the state with a superior party cadre. In Karnataka, the Congress amassed significant goodwill in the run-up to the elections from chief minister Siddaramaiah's welfare schemes. A major scandal over the JD(S)'s candidate Prajwal Revanna, against whom there are multiple allegations of sexual abuse and rape, added to the Congress's momentum in the second phase of the polls in the state.

Finally, the BJP lost a significant share of seats in Maharashtra through what can only be described as a mess of its own making as it wantonly broke Opposition parties and shifted alliances to form the government. It left the state's party system in knots. In 2019, the BJP won 23 seats in the state, but that fell to 11 seats this time.

While the BJP's meteoric growth in Odisha, and the steady growth in Andhra Pradesh and Telangana, were bright spots for the party, this was far too little to offset the losses elsewhere. In an election without an overarching national narrative, regional differences and identities strongly shaped election outcomes — much like a "normal election" before 2014.

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OPED

Mandate 2024: The mirror has cracked

Will the BJP recognise the constraints placed on its dominance by voters? Can the Indian voter and INDIA bloc use the space to build a new consensus on social justice?

There is only one message from the 2024 general elections — the mirror has cracked. The Bharatiya Janata Party (BJP) is the single largest party, but it has lost its majority and confronts the prospect of forming a government in coalition with its alliance partners. In his quest for hegemonic dominance, Prime Minister Narendra Modi, the sole campaigner of the BJP, who mesmerised the Indian voter for nearly a decade, has lost his sheen. There is discontentment and dissatisfaction on the ground and his charm is no longer enough for the voters. Their lived realities have broken the spell.

This was unimaginable only a few months ago. Going into the election, in March 2024, this looked to many, including this columnist, as an election whose outcome was known before it began. The BJP had done everything — using its power to project total hegemonic control. It had centralised political power, stifled all forms of dissent, jailed Opposition politicians, silenced dissenting voices, and stifled civil society. Its control over money and media meant that all one saw, driving around Delhi (the city I live in) were Modi's guarantees. It seemed all sites of political competition and contestation had been captured, and this was going to

be a one-party campaign and a one-party victory. The saffron flags that dotted homes across the city on January 22, the images on our television screens of the PM leading the consecration ceremony in Ayodhya, the passing of the rules of the Citizenship Amendment Act on the eve of the campaign, were together designed to remind the voter of the ideological promise that 400 paar (400 plus) has to offer.

But as the campaign unfolded and the election moved through its seven phases, the voices of the people began to get louder. The BJP and the PM found themselves on the backfoot. Through the campaign, they resorted to polarising rhetoric to create a scare as they sought to enjoin the voter to join the aspirational project of a future developed "economy". But in many ways, voters responded by reminding the BJP that it was their lived realities, their everyday lives that mattered. And thus, the mirror cracked. It is these cracks that tell the story of the 2024 election.

How did this unfold? Away from the bluster of the fastest growing economy, the third largest economy, the shiny physical infrastructure, and booming stock market, is a story of India's real economy: A story of *rozgar* and *mehengai* (employment and high prices). As my colleagues and I travelled through the hinterlands of rural Uttar Pradesh, this is what we heard the most. Voters still spoke of the importance of welfare schemes, ration, in particular. But this was not enough. The Opposition was quick to harness this frustration, speaking repeatedly of unemployment and jobs as the issue of the economy. In Rajasthan, Haryana and western Uttar Pradesh, too,

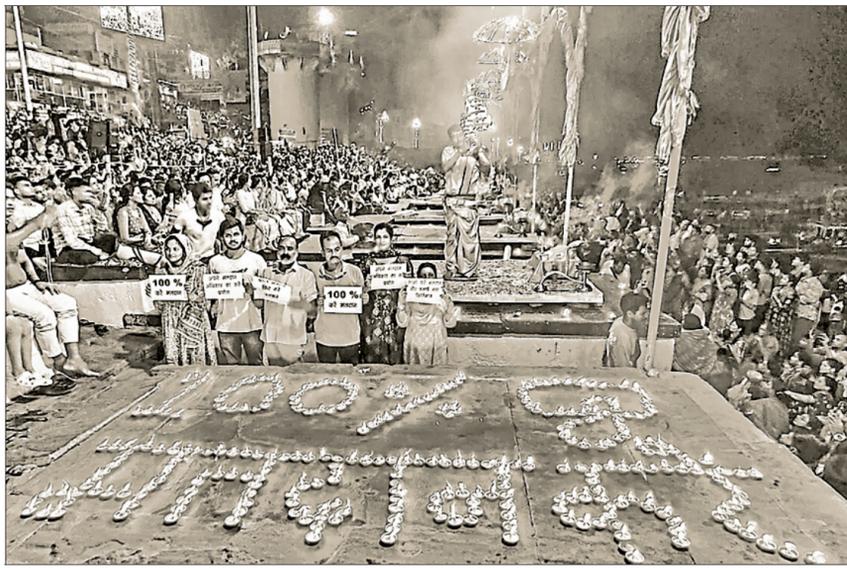
in the aftermath of the farmers' protests, concerns of farmers remained visible. The BJP, on its part, sought to polarise and the PM himself resorted to the most divisive rhetoric to distract the voters and mobilise them on the promise of Hindutva. But for voters, this was simply not enough. It was almost as though they were tired of Hindutva and polarisation alone, and were pushing to hold the government accountable for their everyday concerns. This is why many analysts called this a "normal election guided by local issues" rather than national ones. That this captures the voter's mood is best illustrated in the BJP candidate losing in Faizabad, the home of the Ram Mandir.

That the election returned to "normal, local" issues was a consequence of not just economic distress but also of the BJP's use of institutions of governance crossing red lines for many. The Opposition declared this an election for democracy, social justice and to save the Constitution from the unbridled use of power that threatened democracy. It recognised something the BJP, in its hubris, ignored — that democratic erosion (washing machine, the capture of media, the possibilities of EVM manipulation were all avidly being discussed in rural India, voters were concerned) and anxieties about constitutional rights, particularly reservation, were alive amongst voters. The INDIA bloc's true success is that it was able to channelise these anxieties into a political campaign. The INDIA bloc declared this an election to "save the Constitution" and save "reservation".

For bringing the Constitution into the political discourse, much credit has to be given to Rahul Gandhi and Akhilesh



Yamini Aiyar



In many ways, voters have reminded the BJP that it is their lived realities, their everyday lives that matter

ANI

Yadav. Rahul Gandhi is the real story in this election. His emergence as a leader with credibility and legitimacy, a process that began with the Bharat Jodo Yatra in September 2022, finally consolidated through this campaign. He presented a clear and distinct political position, one that positioned him as a humane, people's leader, centering issues of the Constitution, democracy and social justice. He was also effectively able to use Modi's campaign errors to his advantage in his public rallies and speeches; this is a sharp contrast to the Rahul Gandhi of 2014 and 2019.

But his real challenge comes now. Rahul Gandhi has emerged as a leader by separating himself from the organisational realities and, indeed, the atrophy of the party. He has yet to take his party along to create ideological coherence. The question going forward is this. Now that his leadership finally has some legitimacy,

can he leverage this to strengthen the party organisation and build forward?

The other big story is in federalism and the regional parties that have, with the exception of the BJD, YSRCP, and BRS, held on to their bastions. The TMC and DMK have, for the moment, halted the BJP's aspirations in their states. This, combined with the Congress and alliance victories in Maharashtra and Kerala, will keep federalism in contention. There is a lesson here for the BJP, whose impatience with the federal consensus was one reason for the brakes being put on its Southern sojourn. And, perhaps, an even more important lesson from Manipur, which has rejected the double-engine *sarkar*, that left the state engulfed in violence and mismanagement for over a year, in favour of the Congress. Voters don't trust the BJP to navigate this difficult terrain.

Finally, while the BJP's path to hegemony

has been halted, it remains dominant: 240 seats after two terms, is no mean feat and it is set to form the next government. But how it will choose to govern, in coalition, will depend on how the BJP chooses to interpret this mandate. Will it recognise the constraints placed on its democratic legitimacy by voters? Or will it, in defeat, unleash its basest instinct, glimpses of which were visible through the campaign.

For the Indian voter and the INDIA bloc, the verdict holds a challenge and an opportunity. Can we use this verdict and the space it has created to repair our social fabric torn by hate, divisiveness, injustice and bigotry? Is this an opportunity to build a new consensus on social justice?

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In the verdict, three fundamental questions about narratives, justice and nature of State

The general election results could be read in two different ways. One, it could be argued that these results are going to decide the future configuration of the next regime. The NDA is all set to form the government under the leadership of Narendra Modi-led BJP. It will eventually be a coalition in the true sense of the term. The BJP, it seems, will not be able to maintain its absolute authority over the NDA partners. On the other hand, the impressive performance of the INDIA bloc will make the Opposition more relevant. There is a strong possibility that the success of the INDIA bloc may attract professional politicians, who moved to the BJP from other parties. The revival of the Congress might play a significant role in this process.

There is another — and a deeper — meaning in this verdict, which takes us beyond the numbers in the election outcome. These results seem to redefine three fundamental aspects of Indian polity — the nature of the future Indian State, reconfiguration of the political narrative, and finally, the political recovery of the social sphere.

Let us start with a silent yet powerful debate on the expected role of the State. The BJP Sankalp Patra (or Modi ki Guarantee-2024) revolved around the State model that the Modi regime built and nurtured in the last 10 years. I call it the charitable State — a State that introduces welfare policies in the social sphere to assert its legitimacy as a generous entity, while overtly expressing its commitment to an open market economy.

The BJP designed its election strategy accordingly. The welfare schemes introduced by the BJP regime were evoked to answer two kinds of questions. It is argued that the welfare schemes would empower the citizens so that they can actively compete in the open market. Hence, the charitable State would be able to deal with the contested issue of economic disparity. The second argument is about the secular nature of the welfare distribution. Prime Minister Modi made the point time and again that his policy of welfare has been truly secular.

The Congress, interestingly, posed a serious challenge to this imagination. The proposed Naya Sankalp Economic Policy, which underlines three goals — work, wealth, welfare — made a persuasive argument that the economic sphere needs to be democratised to provide dignified employment and welfare to citizens. Congress leaders also made a few remarks about crony capitalism and emerging monopolies. The election campaign intensified this debate. As a result, the exact role of the State in the economic sphere has emerged as one of the most contested questions during the campaign. The political class cannot ignore this issue in the near future.

The reconfiguration of the political narrative is the second important outcome of this election. Hindutva-driven nationalism has dominated Indian politics for at least a decade. The BJP as well as the non-BJP parties have designed their

political strategies to suit this narrative. This time, the Opposition flipped the narrative. It evoked the idea of *nyay* or justice without making any direct comment either on Hindutva or nationalism. The discourse on *nyay* merely relied upon the old social justice politics of the 1990s by accommodating the question of economic inequalities and wider inclusiveness. This narrative of the Opposition made the BJP uncomfortable and provoked the leadership to communalise the Congress's *nyay* promises. The argument that the Congress would take away the reservation from Hindu OBCs/SCs and give it to Muslims stems from this political unease. It is worth noting that the non-BJP parties did not openly respond to the BJP's attack because they did not want to be perceived as pro-Muslim parties. Nevertheless, *nyay* has begun to take shape as an emerging political narrative. The election results underline this fact.

This brings us to the third outcome of this election: The political recovery of the social sphere. Elections in the Indian context do not merely depend on aggressive campaigns or other methods of professional electioneering. Politics takes shape at the social level. The success of the BJP in the last few years has been the outcome of the party's active presence in the social sphere. The social service-related activities led by the RSS and other Hindutva organisations have created a foundation for the BJP and made it easier for the party to nurture a political discourse at

the grassroots. The non-BJP parties did not have that advantage.

Rahul Gandhi's two Bharat Jodo Yatras, however, marked a significant shift in this regard. Social activists, intellectuals, leaders of grassroots movements, and civil society organisations provided logical support to these initiatives. A moral claim was advanced to justify the direct support given to the Congress. It was argued that Rahul Gandhi's *yatras* must be supported so as to establish a link between the political party (in this case, the Congress) and the people at the grassroots. At the same time, the civil society groups maintained a principled distance from the Congress. The outcome was obvious. The *yatras* were successful in sensitising people including the most marginalised communities living in remote areas of the country. The Congress manifesto reflected the issues and concerns raised and discussed during these two *yatras*. This highly localised intervention expanded the political discourse at the grassroots. Obviously, it does not replace the dominance of Hindutva, yet it has transformed the social sphere into a vibrant site for debates and discussions, especially in the northern states. This election result is going to contribute to this process further.

This deeper meaning of 2024 offers us a perspective to interpret the contemporary moment of our democracy.

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Hilal Ahmed



The BJP's entire top leadership, Modi down, made Odia *asmita* (pride) the single focus of the party's campaign, and made the most of Pandian's "outsider" identity

ANI

Pandian, pride and BJP's path to power in Odisha

The tables have turned for Naveen Patnaik and the Biju Janata Dal (BJD) in Odisha. Analysts and even the diehard supporters of the Bharatiya Janata Party (BJP) could not have imagined that the saffron party would unseat Patnaik, the formidable and popular chief minister of the eastern state since 2000. While it was expected that the BJP would drastically improve its Lok Sabha seat share in the state, largely aided by the popularity of Prime Minister Narendra Modi, not many had thought that a comparatively weak BJP would dominate the assembly elections. Late Tuesday, the BJD was leading in or had won 51 seats (against 12 seats won in 2019) while the BJP was past the majority mark (with 78 seats). Another interesting aspect of the results, however, is the performance of the Congress. A party that had completely folded up in the 2019 assembly elections was leading in/had won 14 seats.

The BJD's performance in the Lok Sabha elections is much worse. While the BJP was leading in/had won 20 seats (out of 21), the BJD won none. In the 2019 elections, even at the height of Modi's popularity, the regional behemoth won 12 seats. A noteworthy aspect of the BJP's near sweep in the Lok Sabha polls is that it has breached nearly all the BJD strongholds with maiden victories in Bhadrak, Keonjhar, Dhenkanal, Cuttack, Kendrapara, Jagatsinghpur, Puri, and Aska. Much of the coastal fortress of the BJD has fallen to a spirited BJP campaign. More consequential for the BJD, though, is the assembly loss. Several heavyweights such as assembly speaker Pramila Mallik, finance minister Bikram Keshari Arukha, forest and environment minister PK Amat, steel and mines minister Prafulla Mallick, science and technology minister Ashok Chandra Panda, to name a few, were trailing by large margins. An electoral tsunami has swept away one of the strongest regional parties. While the BJP failed to convert the Lok Sabha gains to assembly gains last time, this time, it has achieved a much better conversion rate despite marginally lagging behind the BJD in terms of overall vote share (39.98% against 40.18%).

What has aided the BJP's inspiring performance in Odisha? And what went

wrong with the BJD's famed election-winning machine?

Among the many reasons, the VK Pandian factor is perhaps the most consequential one. The outsized role played by the Tamil Nadu-born IAS officer and long-time private secretary to Patnaik in the campaign (including ticket distribution and candidate selection) and day-to-day running of the state government was not taken kindly by most voters, including hardcore BJD supporters. This was visible during the campaign when many candidates openly resented his presence in their rallies and outreach activities. This would have still been fine if his name had not been floated as Patnaik's potential successor. This didn't go down well with the party cadre and the core leadership, and the BJP made the most of his "outsider" (non-native Odia) identity. In fact, the BJP's entire top leadership, Modi down, made Odia *asmita* (pride) the single focus of the party's campaign. A relentless campaign against Pandian stoked doubt even among the staunchest BJD supporters regarding Patnaik's "fragile health" and an alleged grabbing of power by Pandian, and it worked for the BJP.

Sensing an opportunity to unseat the BJD, the BJP campaign fired on all cylinders, including raising strong doubts about Patnaik's ability to run the government. The BJD's dramatic fall in its coastal bastion is proof of this. With emotions running high, even the government's sterling record in governance, especially its remarkable welfare delivery, couldn't stop the electoral tsunami. As a result, Patnaik's popularity was not enough for him to win his second seat in Kantabanji.

The unprecedented verdict in Odisha is a telling reminder not to take the voters for granted. Many warned Patnaik to rein in Pandian and check his role in the party and the government, let alone project him as his political heir. Patnaik did indeed reject the contention that Pandian was his successor in the last phase of the polls, but the damage was already done.



Niranjan Sahoo



Durgamadhhab Mishra

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How the Opposition rediscovered itself and revived its political fortunes in the face of the BJP juggernaut

The exit polls predicted a washout for the Opposition and expected the Bharatiya Janata Party (BJP) to better its 2019 performance. But something very different has happened. Many political observers who travelled extensively did warn us about the changing tide, especially in Uttar Pradesh (UP). However, many like me believed that if the BJP could effectively ward off the challenge from the combined might of the Samajwadi Party (SP) and the Bahujan Samaj Party (BSP) in UP in 2019, then it was unlikely that an SP and Congress alliance could do the trick this time. The BJP's victory margins over its nearest rivals in 2019 seemed too big to scale.

While Opposition parties, under the Indian National Developmental Inclusive Alliance (INDIA), are well below the majority mark of 272, they managed to win a lot more seats than expected by analysts. The Congress, which was becoming marginalised in national politics, has improved its vote share and seat tally considerably — significant also because it contested close to 100 seats fewer than in 2019.

The pan-India alliance worked for the Opposition in states such as Maharashtra and UP. These two states account for more than half the seats the BJP lost to INDIA. The Shiv Sena (Uddhav Balasaheb Thackeray) and the Nationalist Congress Party (Sharad Pawar), despite their depleted organisational strength, pulled off a surprise in Maharashtra

along with the Congress. Similarly, the SP delivered an unexpected performance after a long hiatus (since losing the assembly elections in 2012). The Congress lost more than 90% of the seats in direct contests against the BJP in the last two elections. The BJP would have hoped for the strike rate to continue, but the Congress seems to have won more than one in every four seats this time in such contests. While it may be difficult to empirically establish Rahul Gandhi's role in the turnaround of his party, he must be credited for a nationwide mobilisation through the Bharat Jodo Yatra, settling the party's leadership question with Mallikarjun Kharge becoming the Congress president, giving the Congress's ideological line some clarity and centering the party's campaign on economic and social justice.

The Congress held on to its 2019 showing in Kerala and Punjab but improved its position in Telangana at the expense of the Bharat Rashtra Samiti (BRS). Performance varies for the INDIA camp members. The Trinamool Congress (TMC) in West Bengal improved its 2019 score, while the Dravida Munnetra Kazhagam (DMK) in Tamil Nadu and the Jharkhand Mukti Morcha in Jharkhand held on to their base. But the Rashtriya Janata Dal (RJD) in Bihar, and the Aam Aadmi Party (AAP) in Delhi were not able to pull their weight.

What explains this Opposition turnaround? An overarching explanation is difficult since state-level dynamics were at play after the last two Lok Sabha elections being dominated by a national momentum. Most states had one clear winner. The BJP has retained its core states in central India, expanded its footprint along the Bay of Bengal coastline, and, with allies, held on to Bihar and Jharkhand.

INDIA bloc continued with the momentum it generated in the initial months of summer 2023 and had it not lost some key allies such as the Janata Dal (United), the results could have been further in its favour. While the Congress can take credit for its performance, it also deserves some blame for not spearheading the INDIA bloc as it should have. Had INDIA bloc announced candidates early, it could have picked up a few more seats. One can also argue that the combined effect of economic anxieties at the bottom of the social pyramid, and the counter-offensive of the Opposition that the Constitution is in danger against the BJP's clarion call of "abki baar 400 paar" (this time, beyond 400) played a role. The latter may have led the non-general castes to believe that they may lose their reservation status. This may have worked in states like UP, but the question is why did it not work in Bihar?

The exit polls, while predicting a



Rahul Verma

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OUR VIEW



BJP's vaulting ambition versus coalition reality

Modi's party had aimed for 370 Lok Sabha seats but could not get past the halfway mark. As election results spell the return of coalition rule, India's big victor is arguably the Constitution

The hurly-burly is done. This year's battle for India's Lok Sabha, the world's largest electoral exercise ever, was a story of vaulting ambition even by the high standards of Prime Minister Narendra Modi. In what seemed like an open dare for his Bharatiya Janata Party (BJP), he set for it the target of a two-thirds majority in Parliament: 370 seats. Sufficient not just to make 'anti-incumbency' history, but also emboss our political arena with the BJP's seal of dominance. In Modi's view, this aim of 370 stood for "unity," a reference to Kashmir's integration by scrapping Article 370. In the opposition's view, it reflected a BJP desire to alter the Constitution in line with its saffron ideology. At the end of an election marked by sound and fury over quota carve-ups, minority decoys and other ploys, Modi's party fell short of the halfway mark, winning a likely tally of about 240 seats in the 18th Lok Sabha. This descent from its 303-seat majority of 2019 has left it dependent on allies for power, a slide reflected in a stock-market crash on Tuesday. As reversals go, its significance lay in its surprise. While a BJP ouster from office was always seen as a tail-end possibility at most, few foresaw how BJP losses in Uttar Pradesh (UP)—with only modest gains elsewhere—would loosen its tight grip on power and spell a novel prospect for Modi's party: Its rule will now be subject to compulsions of coalition politics.

The irony for the BJP is that it more or less retained its 2019 vote share of about 37%. Given an expanded base of 642 million voters and Modi's own appeal as a leader, it's valid to argue that he has set yet another record as a vote catcher. Yet, the more dramatic part of this election lay elsewhere, with the BJP's archrival

Congress hauling itself up from below a fifth of all votes polled five years ago to about 21% now. Granted, this is more of a claw-back than a revival, but with around 100 seats of its own and a sizeable haul achieved by its INDIA allies, it is back in the reckoning. If it seemed odd that the BJP aimed almost all its attacks at the Congress, it's now clear why. The older party's upswing is a sign of its sustained relevance as a BJP counter-force. The same can be said of the Samajwadi Party in UP, Trinamool in West Bengal and Dravida Munnetra Kazhagam in Tamil Nadu, all of which scored notable wins as voluble voices against the BJP, which must wonder if its quest for a two-thirds majority cost it the support of Hindi-belt voters unsure of its respect for basic rights—to affirmative-action benefits, specifically—assured by the Constitution. While opposition parties joining hands have not been able to dislodge the BJP from power at the Centre, the latter cannot boast of a clear mandate for its agenda either.

What does that imply? Both the Janata Dal-United and Telugu Desam Party, whose support is critical to the BJP, have a glaring record of playing both sides of the political divide and may plausibly want to drive a hard bargain as part of a ruling National Democratic Alliance coalition. Perhaps the Vajpayee era could serve as a model. Back then, to keep allies on board and economic reforms in focus, the BJP kept three controversial aspects of its agenda aside. Two of those, a Ram temple in Ayodhya and the end of Article 370, have already been done. The third concerns a uniform civil code, an idea best kept on hold till we have a proposal worthy of a national consensus. After all, the unacknowledged victor of 2024 has arguably been the Constitution, our bond of citizenship.



is an independent expert on climate change and clean energy.

That India has made impressive strides in expanding its road infrastructure is undeniable and very visible. Going by historical metrics, one can also possibly justify this expansion. After all, India has a mere 5.13km of road length per 1,000 people, against more than 20km in the US. On the other hand, China has a mere 3.6km of roads per 1,000 population. The annual budgetary allocation of the Union ministry of road transport and highways has been steadily increasing for the last several years, with the last year seeing a 25% jump. At the same time, the ratio between capital and revenue expenditures has changed from about 50:50 in 2014-15 to approximately 90:10 today, implying a greater focus on developing new road infrastructure over maintaining older roads.

The deteriorating quality of existing road infrastructure results in more accidents, lower fuel efficiency and higher pollution. Driving smoothly in a range of 60-80km per hour results in the best fuel efficiency.

As it happens, India's intra-city vehicle speed is among the lowest in the world. It has been estimated that the average traffic speed in Delhi was 25kmph in 2017, 18.9kmph in Chennai, 20.7kmph in Mumbai, 19.2kmph in Kolkata, 18.5kmph in Hyderabad and 17.2kmph in Bengaluru. The significantly reduced fuel efficiency at these modest speeds would obviously result in more fossil-fuel burning than otherwise and hence more greenhouse gas and other emissions that constitute air pollution.

The transport sector is a major contributor to global greenhouse gas emissions, at 14% of the total in 2018, as estimated, nearly four-fifths of it from road transport. The sector also accounts for a major proportion of urban air pollution; pollution-related deaths numbered 1.67 million in 2019, according to a new report led by Boston College researchers, and a significant fraction of these would be from air made toxic by the exhaust of vehicular traffic.

The road transport sector also takes a heavy toll in terms of mental stress and anxiety. Of the 30 most polluted cities in the world, 21 were found to be in India in 2019. As per a study based on 2016 data, at least 140 million people in India—largely the poor—breathe air that is 10 times or more

over the World Health Organization safe limit and more than half the world's cities with the highest annual levels of air pollution are in India (with a over a quarter of it caused by vehicles). Not much would have changed in the years since then.

In addition to committing the country to achieve net-zero emissions by 2070, India has also committed to reduce its count of road-related accidents—which is among the highest in the world, accounting for 11% of global deaths every year in road mishaps—by about half by 2030.

A strategy focused on road expansion will not get us there. Increasing capital expenditure is resulting in an 'upgrading' of both intra-city as well as inter-city road infrastructure.

Inadequate attention to the design, engineering and planning for such investment projects, however, is resulting in 'band-aid' fixes that are only likely to shift traffic choke-points, causing congestion elsewhere within cities/regions and enormous environmental

and resource impacts at every level. The National Capital Region (NCR) provides a good case study of such outcomes. A little over a decade-and-a-half ago, the Delhi-Gurgaon Expressway was inaugurated, began witnessing horrific accidents within months involving pedestrians and smaller vehicles. This project was an example of road infrastructure catering only to fast-moving four-wheelers; its investment plan did not find it necessary to provide any cross-over points for pedestrians or for smaller 2- and 3-wheeled vehicles whose users were often left with no choice but to unsafely access the Expressway. Nor did this project plan for vehicular and pedestrian movement under its flyovers. Today,

we see the same mistakes repeated in the newly inaugurated Dwarka Expressway that runs at some distance away.

These projects are also prime examples of shifting choke-points. Commuters between Delhi and Gurgaon still have had to suffer many hours stuck in long traffic jams on the

expenditure of the economy. In 2023-24, it grew 8.5% (not adjusted for inflation), the slowest since 2004-05, other than the pandemic year of 2020-21. Consumption growth has slowed down primarily due to a lot of it being financed through household borrowings. Economists Nikhil Gupta and Tanisha Ladha of Motilal Oswal note that in 2023-24, only the second time in history, household debt has "likely crossed 6% of gross domestic product."

Indeed, households cannot endlessly finance consumption through higher borrowing. And that's reflecting in the sales growth slowdown. If this goes on, it'll eventually hurt profit growth.

Finally, stock valuations have been in frothy territory. In 2024-25, the price-to-book (PB) ratio of stocks that make up the BSE 500 index has been the highest since 2007-08. The PB ratio is a valuation measure.

But all this is theory, which hasn't mattered as retail investors have kept pouring money into stocks. Will they continue to do so, or will the realization that valuations have been stretchy set in? Clarity is likely to emerge in a few days. Nonetheless, it's worth remembering what happened on 17 May 2004 when it became clear that the Atal Bihari Vajpayee-led NDA government wouldn't be voted back to power. The market, which was in love with the BJP, fell dramatically, with the Sensex falling by 11.1%. Two days later, it recovered most of the losses upon the realization that governments in India rarely fiddle around with economic policy, and there is usually continuity on that front.

At the time of writing this, the BJP-led NDA looked set to return to power at the Centre, though with a considerably lower majority.

Of course, there are no guarantees in politics, like in investing, and diversification across and within investments remains the best game in investment town, which is something that retail investors who had been in denial have perhaps begun to understand.

MY VIEW | ON THE OTHER HAND

It is the stock market's love for the BJP that has cost it so dearly

Money poured in even as valuations grew frothy and a return to sound share prices will do it good



VIVEK KAUL is the author of 'Bad Money'.

The stock market has been in love with the idea of the Bharatiya Janata Party (BJP)-led National Democratic Alliance (NDA) comprehensively winning India's 18th Lok Sabha election. And it has been discounting that possibility. While the BJP has turned out to be the single-largest party in the Lok Sabha, the number of seats it has won is nowhere near the number forecast by exit polls or the number it had in the 17th Lok Sabha. So, the stock market has had to tone down its over-optimism. An added factor is the BJP not getting a majority on its own. Given this, the S&P BSE Sensex closed down 5.7% on 4 June. Stocks of public sector units and the Adani Group bore the brunt of the selling.

With election results factored in, what does the immediate future hold? A major reason for stock prices surging in the past few years has been a substantial increase in sales and a massive increase in profits of listed companies. While some of this rise can be attributed to the efforts of companies, a lot of it has been because of factors that are not easily repeatable.

The increasing formalization of the economy after demonetization, the spread of the covid pandemic and weak implementation of GST all hit India's informal sector, but listed firms did well. Further, very low interest rates during the pandemic helped them

lower their interest expenses and outstanding borrowings. In September 2019, the government cut the corporate tax rate, boosting profits. Also, import tariffs rose, making the domestic market more attractive for companies.

Further, during the pandemic, global central banks printed money to drive down interest rates, leading to a lot of money coming into Indian stocks in search of higher returns. From April 2020 to 4 June 2024, foreign institutional investors invested a net ₹2,79,369 crore in Indian stocks, though they have net sold stocks April onwards.

Indeed, domestic investors also turned to investing in stocks after covid. The number of demat accounts jumped from 39.4 million in December 2019 to 154.4 million in April 2024.

Further, domestic institutional investors (DIIs), which comprise mutual funds, insurance companies, provident funds, banks, etc, and who invest money collected from retail investors, invested a whopping ₹6,55,262 crore in stocks from April 2020 to 3 June 2024. From April 2024 to 3 June 2024, they have invested a net ₹1,01,833 crore. Also, the rise of smartphone investing apps, fuelled by cheap internet access, has led to higher retail interest.

Nonetheless, the larger point is that the number of new retail investors in stocks can't keep rising at this fast pace. Also, interest rates are no longer low.

So, what does the future hold? Stock prices ultimately are a reflection of the expected earnings of companies. Data from the Centre for Monitoring Indian Economy shows that in 2023-24, the net sales of around 4,800 listed firms rose 6% from 2022-23, considerably lower than the jump in 2022-23 and 2021-22. However, growth in net profit has stayed robust, thanks to expenditure rising at a slower pace than sales. In fact, in 2023-24, the net sales of more than 3,700 listed non-financial services companies grew less than 1%.

So, sales seem to be catching up with the slowdown in private consumption

10 YEARS AGO



MINT METRIC

by Bibek Debroy

An Indonesian man is in shock,
A wife married in holy wedlock
Turns out to be a man.
Without consummation, away she ran.
A dating site now in the dock.

MY VIEW | ECO SQUARE

Road mobility in India: Both unsustainable and unjust

LEENA SRIVASTAVA



is an independent expert on climate change and clean energy.

That India has made impressive strides in expanding its road infrastructure is undeniable and very visible. Going by historical metrics, one can also possibly justify this expansion. After all, India has a mere 5.13km of road length per 1,000 people, against more than 20km in the US. On the other hand, China has a mere 3.6km of roads per 1,000 population. The annual budgetary allocation of the Union ministry of road transport and highways has been steadily increasing for the last several years, with the last year seeing a 25% jump. At the same time, the ratio between capital and revenue expenditures has changed from about 50:50 in 2014-15 to approximately 90:10 today, implying a greater focus on developing new road infrastructure over maintaining older roads.

The deteriorating quality of existing road infrastructure results in more accidents, lower fuel efficiency and higher pollution. Driving smoothly in a range of 60-80km per hour results in the best fuel efficiency.

As it happens, India's intra-city vehicle speed is among the lowest in the world. It has been estimated that the average traffic speed in Delhi was 25kmph in 2017, 18.9kmph in Chennai, 20.7kmph in Mumbai, 19.2kmph in Kolkata, 18.5kmph in Hyderabad and 17.2kmph in Bengaluru. The significantly reduced fuel efficiency at these modest speeds would obviously result in more fossil-fuel burning than otherwise and hence more greenhouse gas and other emissions that constitute air pollution.

The transport sector is a major contributor to global greenhouse gas emissions, at 14% of the total in 2018, as estimated, nearly four-fifths of it from road transport. The sector also accounts for a major proportion of urban air pollution; pollution-related deaths numbered 1.67 million in 2019, according to a new report led by Boston College researchers, and a significant fraction of these would be from air made toxic by the exhaust of vehicular traffic.

The road transport sector also takes a heavy toll in terms of mental stress and anxiety. Of the 30 most polluted cities in the world, 21 were found to be in India in 2019. As per a study based on 2016 data, at least 140 million people in India—largely the poor—breathe air that is 10 times or more

over the World Health Organization safe limit and more than half the world's cities with the highest annual levels of air pollution are in India (with a over a quarter of it caused by vehicles). Not much would have changed in the years since then.

In addition to committing the country to achieve net-zero emissions by 2070, India has also committed to reduce its count of road-related accidents—which is among the highest in the world, accounting for 11% of global deaths every year in road mishaps—by about half by 2030.

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and resource impacts at every level. The National Capital Region (NCR) provides a good case study of such outcomes. A little over a decade-and-a-half ago, the Delhi-Gurgaon Expressway was inaugurated, began witnessing horrific accidents within months involving pedestrians and smaller vehicles. This project was an example of road infrastructure catering only to fast-moving four-wheelers; its investment plan did not find it necessary to provide any cross-over points for pedestrians or for smaller 2- and 3-wheeled vehicles whose users were often left with no choice but to unsafely access the Expressway. Nor did this project plan for vehicular and pedestrian movement under its flyovers. Today,

we see the same mistakes repeated in the newly inaugurated Dwarka Expressway that runs at some distance away.

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Delhi-Gurgaon Expressway. Earlier, these traffic jams had resulted in the shutting down of a toll plaza between the two cities, adversely impacting project revenues. Now, with the recent opening of the Dwarka Expressway, choke points have shifted to links between the two expressways, with average vehicular speeds of under 20kmph on these fairly long stretches.

Viewed from the point of view of mobility demand management, the above commentary highlights a paradox of road transport. Capacity additions have to happen speedily just to stay in the same place and easing congestion gets harder as demand rises.

While toll charges for new expressways are a deterrent to trucks using these facilities, climate and air pollution concerns should have been driving these towards public and rail transportation modes.

Similarly, de-bottlenecking attempts like odd-even schemes within cities merely result in higher ownership of vehicles; here too, a focus on demand management would be a much more cost- and environmental-effective way of providing mobility services. Unfortunately, industry and others that can play a large role in demand management continue to get a free pass at the expense of poorer commuters.

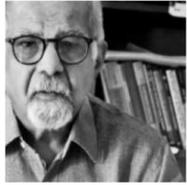


MY VIEW | RASHOMON DIARIES

MINT CURATOR

Failure has many mothers: The Indian voter gets it right again

A 'we can do no wrong' attitude seems to have led the BJP to a weakened mandate. We can expect better checks and balances



SURJIT S. BHALLA is former executive director at the International Monetary Fund and former part-time member of the Prime Minister's Economic Advisory Council.

Failure has many mothers. Explanations will be many over the next few days, if not months, about why the Bharatiya Janata Party (BJP) led by Prime Minister Narendra Modi, someone who has not lost an election to date, lost the 2024 Lok Sabha election. One outstanding reality is that the Bharatiya Janata Party (BJP) will be below the majority mark on its own. There are several corollaries to this conclusion: among them, the rise of the Congress, the survival of Janata Dal-United's Nitish Kumar and the resurgence of Telugu Desam Party's Chandrababu Naidu.

Before we get to the big failure, some important side-stories to consider.

Why did pollsters get this election so wrong? I am an election junkie and have forecast elections even when not asked to. In my book *How We Vote* (with Abhinav Motheram), I had forecast a comfortable victory for Modi. I based my conclusion on the simple proposition that people vote on the basis of improvement in individual economic welfare. The analysis was right, the forecast was wrong. Across the seven seas, there is a parallel phenomenon emerging, and one where the hypothesis 'It's the economy, stupid' originated. By all accounts, Joe Biden is presiding over a very successful US economy, a performance that would have predicted a healthy victory for the Democrats in November 2024. According to many analysts, the Democrats will likely lose 2024.

Most exit polls reached the same conclusion as mine; and the best performing exit poll, by *Dainik Bhaskar*, had the National Democratic Alliance (NDA), which the BJP leads, at 316 seats (+34). It had the I.N.D.I.A. alliance at 173 seats (+28). While credit should be given where due—i.e. by getting the NDA tally approximately right at the low end—there is failure at the upper bound of I.N.D.I.A., which will likely go home with 225+ seats.

In other words, the whole class failed. Why and how? The last time the whole class failed was in the 2015 Bihar assembly election. I was one of the few who got it right. Useful advice to forecasters: Advise people often and always remind them when you are right. But when you do, it is advisable to point out your failures as well!

Three states stand out as performers for the I.N.D.I.A. alliance: Uttar Pradesh, West Bengal and Maharashtra. Equally, the NDA should introspect and identify its mistakes. A common feature in all these states was anti-Muslim rhetoric and polarization. About a year ago (before the ODI World Cup), I was surprised by the extreme reaction (arrogance?) of intellectual conservatives to my suggestion of opening the doors to normalization of relations with Pakistan by allowing cricket friendship tours. Remove Article 370, but normalize cricket ties. But the 'conservatives' won.



Introspection is the buzzword post the election. Modi and the BJP have to introspect the most. An open-door policy of welcoming all to a party known for its disciplined intake, the rise of corruption, and a profoundly mistaken belief that polarization works, all these deserve some thought. Underlying all this seemed an arrogance bordering on 'We can do no wrong.'

The BJP was seemingly coasting to victory when a downturn in voter turnouts in the first two phases appears to have convinced the party's 'planners' that anti-Muslim rhetoric and polarization works. There is no evidence that it does, and Karnataka a year ago was an important piece of proof that polarization is counter-productive, and equivalent to 'Apne pair pe apni kulhadi maarna.' A lose-lose proposition. So, why did the BJP leadership indulge in it? A credible one-word explanation may be arrogance; i.e., a we-can-do-no-wrong attitude. Another pointer from the Karnataka assembly election was that while corruption in India was all pervasive, it was expected that the BJP under Modi would be significantly less corrupt than the rest.

I want to end this column on failures with successes that supersede failure. The Indian voter, ever mindful of pulling the correct lever for the country, has set in motion much-needed checks and balances to policy. To use an analogy from economics, why do monopolies happen? Because of innovation, because of invention and because of

thinking big. Why do monopolies fail? Because the monopolist, having tasted profound success, wanders into complacency, and worse, arrogance. The end of arrogance comes from competition.

Significant checks and balances are now likely to invade the BJP policy space. At every opportunity, I hold up my mobile and state, "Jaago aur jaagte raho—duniya badal gayi hai" (Stay alert, for the world is changing), followed by the maxim, "There is no place to hide anymore."

In policy terms, we could expect substantially less misuse of Enforcement Directorate powers, less tolerance of sexual offenders (as in the case of wrestlers), and less (or zero?) imprisonment of opposition leaders. Expect less centralization of power in administration—again, monopoly has advantages before laziness in thinking and arrogance of action devour the monopolist. Expect less banning of data, less suppression of information and more freedom of expression.

As I have mentioned often, and will continue to write, no data should be suppressed, however bad its quality. The non-release of the 2017-18 Household Consumer Expenditure Survey set in motion an atmosphere of suspicion and non-acceptance of any data produced by Indian statistical authorities. Why it happened for the first time in India is a question still not answered. Again, the ever-mindful Indian voter will have an effect.

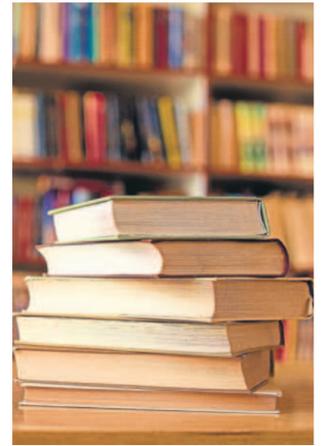
This election, as always, belongs to the Indian voter.

The best business books tend to be about music and sports

These are written by obsessed fans with far fewer ulterior motives



TYLER COWEN is a Bloomberg Opinion columnist and a professor of economics at George Mason University.



The bookstore test: Which section are you drawn to? ISTOCKPHOTO

Here is a question I once asked myself while browsing in a modest-sized bookstore, which is one of my favourite things to do: If I had to read all the books in the store section by section, which one would I enjoy the most—and which the least?

For me, the second question is easier: I am not a fan of self-help books and business management books, two genres that have all too much in common. Granted, you can find some good advice in these books. But too often the exhortations are clichéd or lacking in context. It is only a matter of time, I predict, before the most popular author in these genres will be ChatGPT.

I thus have a modest proposal for anyone interested in business books: Read books about specific businesses or industries that you already know a lot about. That way, you will have enough contextual knowledge for the book to be meaningful. Of course, many people don't work at a company or industry big or famous enough that there are books about it, so I have a corollary proposition: You will learn the most about management by reading books about sports and musical groups.

Most people have favourite musical artists, athletes or sports teams. Often they have been following these people and institutions for years. That gives them enough context to make sense of the management stories—how the teams were put together, how leaders emerged, how people dealt with setbacks and failures, and so on. All these are business-relevant topics.

I have learnt a great deal about management and group dynamics, for example, by reading books about the Beatles—especially ones that cover their origins, breakup, or both. You can see the importance of a good manager (Brian Epstein, until his death), competitive pressures from other musicians and intragroup rivalries, such as the eventual ascent of Paul over John, due to Paul's superior work ethic. Because I know a lot about the background, the stories make sense to me, and I can ferret out some general principles to apply to other business or small-group settings—such as the importance of getting new projects off the ground, which is something Paul excelled at.

My point is not that you should read about the Beatles. It's to find for yourself what the Beatles are for me. I have also learnt a great deal from reading histories of the Byrds, who were less successful than the Beatles, and the British punk group XTC, who never made much money from

their music at all. Failures and lesser successes are also worth studying, but traditional business books tend to focus too much on villains and scandals rather than attempt a sympathetic understanding.

One of my favourite 'business books' is a scintillating autobiography by Alex Ferguson, the famous coach of Manchester United. It was written with Michael Moritz, who used to be a journalist and later became a venture capitalist. It is one of the best books I have read on how to understand and seek out talent.

To understand the concept of team loyalty and how to build it, I have also relied on Jerry Kramer's *Green Bay Packers memoir Instant Replay*. Both Manchester United and the Packers are businesses, of course. Sam Smith's *The Jordan Rules* poses the question of whether a charismatic leader, in this case basketball star Michael Jordan, can push other workers too hard. I look forward to good, detailed biographies of Magnus Carlsen and Steph Curry, two of the most impressive achievers, both obsessed with continual self-improvement.

Many music and sports books are not only written for obsessed fans, but also written by obsessed fans. Traditional business books, in contrast, are frequently written to get consulting work or on to the speaker's circuit. The incentive is not to offend anybody and to put forward some 'least common denominator' insights, rather than say anything truly original that might be complicated to explain. The end result is a bookstore section that would be mind-numbing to have to read.

And which section of the bookstore would I be most keen to read through?

I suppose I should speak up for my profession, but books about economics have too much repetition (how many critiques of 'neoliberalism' must one plough through?) and doomsaying (which sells better than optimism). Instead I would pick the history and biography sections. Those books typically are rich with context and detail, and vary in mood.

Business books can be found almost anywhere in a bookshop these days—once you know where to look. The trick is to know that the very best business books tend not to be written for reasons of... well, business. ©BLOOMBERG

MY VIEW | EX MACHINA

AI can empower India's DPI by enabling diverse apps

RAHUL MATTHAN



is a partner at Trilegal and the author of 'The Third Way: India's Revolutionary Approach to Data Governance'. His X (formerly Twitter) handle is @matthan.

Last month, at an event in Bangalore, a select audience was given a glimpse of what the future of artificial intelligence (AI) might look like. In the room were companies from across the AI ecosystem, presenting what they were building and getting to know what else was going on in the space. There were product demonstrations, ecosystem presentations and workshops, all of which were rolled up into a grand vision of what it would take to make India the AI-use case capital of the world.

I came away with a number of new insights from the event. For instance, I realized that compute does not have to be centralized in a massive data centre, but could instead be distributed across a number of micro data centres accessible over an interoperable protocol. Or that we do not need to wait for a new AI law to come into force if every Indian AI company can pledge to abide by a code-of-conduct that will guide their innovation in this space. But, of all the ideas that were presented that evening, the

one that really gave me pause was how AI could radically expand the reach of our digital public infrastructure (DPI).

An essential feature of the DPI playbook is the unbundling of traditional processes so that they can be rebuilt as DPI solutions. This is very often the only way to transform existing services so that they can reach population scale. Standardization, therefore, lies at the heart of effective DPI design. It ensures that the largest cross-section of society can avail these services, and that, regardless of which entity is providing the solution, the underlying service is consistent and reliable. DPI solutions that have been built using standardized protocols are capable of supporting cross-sectoral applications.

The trouble with standardized solutions is that they are unable to account for diversity beyond a point. By optimizing for scale, the DPI approach has sacrificed variability. To compensate for that, we let the private sector access and leverage DPI, trusting that market forces would encourage them to innovate in order to meet the diverse requirements of their customers. While there are numerous examples of how private innovation has enhanced DPI solutions, AI can exponentially accelerate this.

Unlike traditional systems that do not eas-

ily adapt to the needs of a richly varied population, AI can dynamically adjust to individual preferences and contexts, progressively making the delivery of public services more responsive and user-centric. Rather than forcing users to learn how to use new technology systems, AI can learn people's preferred modes of engagement and adapt. It can address linguistic and cultural diversity by adapting to suit local contexts, rather than forcing users to upgrade their digital skills.

To illustrate the potential of how AI can enhance existing DPI, Setu, a financial services company, demonstrated an AI-enhanced personal financial management (PFM) app. The app it showcased was built entirely inside a WhatsApp bot, presenting a familiar environment within which users could interact through a conversational interface. The way it works is that it first uses the Account Aggregator system to pull whatever information it needs to analyse the user's financial behaviour. Having identified sources of

income, current lending history and individual spending patterns, it can assess the user's discretionary spending capacity. Having calibrated this baseline, the chatbot is ready to offer the user advice on purchase decisions.

For instance, if the user wants to buy a refrigerator, the app can integrate with the

APIs of various popular e-commerce sites to identify the best available deal. It can then trawl through the full range of financing options available to the user and identify the most favourable. Finally, it can crunch all this data and present the user with 4-5 options that are best suited to her individual financial circumstances.

As impressive as this might seem, none of it is particularly novel. There are already a number of services that provide users with similar financial management services which, once they have been integrated into the Account Aggregator ecosystem, will be able to achieve similar outcomes. What differentiated this from anything I had seen so far was the intuitive and

conversational manner in which users are able to interact with it. Even for the most financially savvy, PFM is a daunting subject. What the demo showed was that it is possible to navigate complex issues like this relatively easily if people are engaged using a friendly chat interface within a familiar online environment.

This is what has been missing from our DPI playbooks so far. While we have successfully scaled our DPI solutions to reach the entire population, we have struggled to do so in a way that adequately addresses the diversity of our population. As useful as it has been to allow private parties to innovate on the edge, we have found that they still struggle to serve users with low resources and low capacity to deal with digital services.

AI can bring variety to a DPI approach that has so far been optimized for standardization. It can do so by dynamically adjusting to individual contexts while still remaining scalable. As more and more of our companies start to integrate AI into the DPI solutions they provide, we will finally be able to bring diversity to the solutions we scaled through standardization.

It is only once we do this that our digital public infrastructure approach will truly be of benefit to every citizen.

AI technology can provide the ability to engage multitudes and give our scale focused DPI what it lacked



The Indian EXPRESS

FOUNDED BY

RAMNATH GOENKA

BECAUSE THE TRUTH INVOLVES US ALL

Balance restored

NDA may form a government for the third time but air of despondency has, for the moment, lifted



PRATAP BHANU MEHTA

THE GENERAL ELECTION of 2024 is a wondrous moment. The air of despondency, the suffocating shadow of authoritarianism, and the nauseous winds of communalism have, at least for the moment, lifted. The NDA may form a government for the third time. That is not a milestone to be scoffed at. But this election was not an ordinary election. At stake was the continuing possibility of politics itself. At the very least, the result pricks the bubble of Prime Minister Narendra Modi's authority. He made this election about himself: His performance, his omnipotence and omniscience, and his ideological obsessions. Modi is, for the moment, not the indomitable vehicle for History, or the deified personification of the people. Today, he is just another politician, cut to size by the people.

The election portends a radical realignment of Indian politics on several dimensions. In the first instance, it restores a finer balance of power between different political parties. In the absence of this result, India would have been headed towards unchecked domination of the BJP. It was a domination that threatened to end the possibility of all politics, swallowing up all opponents, and colonising all of civil society. India now has once again a deeply competitive political system. With that comes the possibility of checks and balances and accountability. This balance was made possible in part by an INDIA alliance, especially in UP, that miraculously held together. The BJP has held onto its national vote share, but has been denied seats. If the alliance holds together, it can become a permanent political force. At the very least, it became a serious contender as an alternative. TINA (There is no alternative) is not a factor anymore. It has to be said, this is a tribute to the dogged persistence of the Opposition that has battled the full might of being targeted by the government, a hostile media, and deep scepticism going into the election. Full marks to Rahul Gandhi and Akhilesh Yadav for proving sceptics (this columnist included) dead wrong, for crafting an alliance and being able to transfer their votes.

The election was, in part, fought on the theme of danger to democracy, institutional degradation, and risk to the Constitution. A more balanced polity also allows the possi-

bility of institutional regeneration. Independent institutions and civil society also feel more empowered if they live in a context of greater political competition. It makes it harder to manufacture a false social consensus that disempowers individuals. The mere prospect that power might change hands is an antidote to the servility that had set in India's elites and independent institutions. It will make it harder to brush aside Parliament. But the fact that the BJP has lost half the seats in UP also opens up the possibility of more contestation and dissension within the party. The party itself will now have to become more of a negotiated entity. Whether Mr Modi is capable of that negotiation is an open question. This election opens up the possibility of a return to the trends that we saw between 1989 and 2014, where the polity will require coalition building and consensus.

The election is a reconfiguration of the social imagination of Indian politics. The BJP had upended conventional wisdom over the last decade by reconceiving the social imagination of Indian politics. The first was the consolidation of a Hindutva identity that, in part, tried to widen its social base to include OBCs and Dalits. It also used fragmented contests to make the minority vote irrelevant. But these strategies have now run its course. There is some evidence that the Dalits have moved away from the BJP and, more improbably, moving to the INDIA alliance. The minorities have finally found enough resoluteness in the Congress and the SP.

The second was the tapping into a vernacular politics of cultural resentment in the Hindi heartland, transforming it into a cultural block. This was aligned with an ability to radicalise a greater percentage of Hindus. Radicalising a third of the Hindu society, if we want to use a shorthand, might be possible. And that was often enough for political gains with a weak and divided Opposition. But permanently radicalising a majority of Hindus is much harder. The Prime Minister, constantly tapping into the theme of resentment and hate, tried just that. It was so successful that even the BJP's critics thought of the Hindi heartland as an impregnable block, trying to stoke North-South divisions as a substitute. The blockbuster story of this elec-

tion is the puncturing of this myth. But the big lesson is that politics is not over-determined by social identity, it is now available for being reconfigured in different contexts.

There is also the vexed issue of the Indian economy. The mandate is not a full-scale repudiation of the BJP's economic performance. The generalised anger was missing. But it does point to the fact that welfare coalitions have their limits. The Congress found out a decade ago that after it had done welfare and gains in infrastructure it got stuck. The BJP tried the same on an accelerated basis, with a greater ability to take political credit. But welfare coalitions run their course after a term or two in the absence of a fundamental structural transformation of the economy, which is still eluding the Indian political system. This will make any government vulnerable.

Finally, the election also punctures the myth of the BJP as a party with a difference. Its open structural corruption, complete disregard for institutional propriety, and the coarseness of its public discourse opened up a yawning gap between the Prime Minister's wanting to claim the mantle of virtue for the BJP and its concrete vices. Prime Minister Modi is still popular. But what people saw in this campaign was not a leader, but an increasingly self-aggrandising figure, a prisoner of his own delusions of divinity. And as always, it is that self-love that was also the cause of his vulnerability.

In this kind of election, the results, and policy implications, are hard to interpret both for the ruling party and the Opposition. Mr Modi has been partially humbled. But the social infrastructure of communalism and vigilantism he has enabled will not disappear easily. It may acquire an autonomous life of its own. This election is proof that concentration of power is no panacea for India. But will the new political configuration allow the production of the kind of policy consensus that can create the conditions for national regeneration? This is an open question. But for now, this is a moment to savour the sweet elixir of freedom that greater political competition brings.

The writer is contributing editor, The Indian Express

VOTE FOR GOVERNMENT — AND OPPOSITION

For Prime Minister Narendra Modi, the mandate is for humility and negotiation; for Rahul Gandhi, it shows a clear way forward

THE FINAL NUMBERS will not tell the full story of this election verdict. The BJP, most of all, must carefully read between its lines and beyond them, too. A decade after the Narendra Modi-led party brought back the single-party dominance system to national centrestage, having replaced Congress as its centre-piece, India is set to have coalitions on both sides of the government-*Opposition* divide. The people of this diverse country have spoken and they have said that they are not one but many. And that they will not be straitjacketed by the homogenising political project that imposes One Leader, One Party, One Religion.

In days to come, this verdict will be decoded and its many strands parsed by players — on all sides — in ways that are sometimes self-serving. But it seems already clear that Scoreboard 2024 punctures the concentration of power and the thinning of checks and balances that had become normalised and institutionalised in the Modi government for 10 years, with the consequent shrinking and stifling of breathing spaces for the political Opposition as well as civil society institutions. The BJP-led NDA is poised to form the government again, and a third consecutive term in power is an undoubted achievement. But it would do well to acknowledge that its mandate this time is both quantitatively and qualitatively different: It opens up room in the system for other players. And carries a warning the BJP can ill afford to either ignore or downplay.

NOT JUST HIS party, Narendra Modi, who is set to return as prime minister, the first after Jawaharlal Nehru to get a third term, will need to take a message, or two, on board too. While large numbers of the people of India continue to repose faith in his leadership — the BJP's successes, depleted and circumscribed as they are, come at the end of a highly personalised campaign that centred on "Modi's guarantees" — this verdict situates him firmly on the ground. It places him squarely amid the push and pull of factions, faultlines and cleavages, thrusts upon him the responsibility of negotiation with allies and navigation of a crowded terrain. The onus of listening and humility is on him.

Modi's newly re-defined role will need him not to continue deriding his political opponents with impunity, or be seen to target them single-mindedly. It will need him to see the perils of not just overweening ambition — the anxieties stoked by the "400-paar" slogan in vulnerable sections may have contributed to the BJP's striking downsizing — but also the dangers of ratcheting up religious polarisation in a diverse country. His charged rhetoric about "mangalsutra" and "mujra" that sought to play upon Hindu insecurities, and his painting of a scare scenario in which reservation, property and rights will be taken from the majority and handed to the Muslim minority, didn't work for him. It may even have contributed to paring down his mandate — the BJP's seat tally has fallen by over 60.

THIS IS A good day for the Opposition, for the INDIA alliance, and especially for Congress leader Rahul Gandhi. The Opposition faced an uphill task, and a playing field visibly tilted against it. Two non-BJP chief ministers, Arvind Kejriwal and Hemant Soren, were arrested on election-eve, and the bank accounts of Congress frozen. Shiv Sena and NCP had been split and splintered in Maharashtra, and Central agencies, ED-CBI-I-T had selectively targeted Opposition politicians. In several states, the routine criss-cross of leaders and workers from one party to another on poll-eve that belies the polarisation at the higher echelons had taken the shape of a pattern — the BJP's ranks were swelling because of those migrating to it from other parties. It was against such odds that the INDIA alliance, made of parties with different and even conflicting agendas and interests, put up a spirited fight against a mighty BJP.

NO ONE BORE the weight of the battle more singularly, and more resiliently, than Rahul Gandhi. This verdict also brings vindication for him, personally and politically. Having been painted as a dilettante, a non-serious politician and a dynast by the BJP's machine, disqualified as an MP for a speech, he sought to break out of it in the run-up to this election with his two Bharat Jodo yatras, south to north, east to west.

The message for him in this verdict is that hard work pays, and that a politician who reaches out to the people will be rewarded, no matter what the obstacles stacked against him. Rahul and his party must now use their much improved numbers to make their voice heard and keep the government on its toes in Parliament and other spaces. A celebration is well-deserved, but there is little time for triumphalism.

There is work to be done to live up to the message in the mandate for all the constituents of INDIA, but especially for Congress and Rahul Gandhi. They have just been given a signal that while the people have not turned to them, they are giving them a hearing. Because this time the people of India have voted in not just a Government, but also an Opposition.

EXIT EXIT POLLS

Pollsters must go back to the drawing board. They must ask and answer tough questions, to be taken seriously

EXIT POLLS ARE an important feature of the electoral process in a democracy. They help gauge public opinion, provide important clues on which way the wind is blowing. But when their results are so wide off the mark — on Saturday, several polls had predicted that the BJP-led NDA would get a roughly two-thirds majority, with some even projecting the NDA would touch 400 seats — it is only natural for questions to be raised. More so when they have shown the power to move markets. On Monday, the BSE Sensex had surged, ending the day up 2,507 points or 3.39 per cent, as investors were enthused with these polls, which indicated a return of the incumbent with a comfortable majority. But, on Tuesday, when the actual results were declared, and reality was different by a dramatic margin, the markets tanked 5.74 per cent.

There is always the possibility of barometers going wrong. However, this is not one-off. There have been several instances in the past of a marked divergence in the results of exit polls and actual electoral outcomes — as it was in the case of the Lok Sabha elections in 2004, and in assembly elections in Bihar in 2015 and Chhattisgarh in 2023. Pollsters need to urgently look within. They must carefully examine how the sample households/respondents are chosen and whether they are an accurate representation of the voting population. They must investigate if some sections of voters are underrepresented in their analysis. Is that why they failed to capture the swings in seats? What was the error in sampling? And how were the questions framed and the responses elicited? After all, few had expected the INDIA alliance to touch 200 seats. Stricter disclosure norms regarding the funding of these organisations and surveys also need to be put in place. There is a collateral damage that such surveys have in times when large sections of TV media are seen as megaphones of those in power and have lost their credibility. Their alignment with the exit polls puts another question mark on their reputation.

Their performance in this election should prompt soul-searching among pollsters. The absence of convincing answers will only lend credence to conspiracy theories that question their motives. They must go back to the drawing board. After such a drubbing, they must answer tough questions to continue to be taken seriously.

MESSAGE FROM KARNATAKA

A new voter has emerged, demanding dignity and accountability



A R VASAVI

FROM THE 2019 elections, which had given 25 out of 28 seats to the BJP and only one to the INC, the current results with gains for the Congress indicate complex political equations and responses. The INC was expected to build on its achievements in the 2023 Assembly elections and send a majority to Parliament. Instead, its gains indicate that its promises of a bounty of populist goodies could not garner enough support. The key reason is its nomination of at least seven new candidates from established political families. These novices were seen as privileged players whose commitment and abilities were questioned not only by voters but also by INC workers. Little wonder that very few of these legacy candidates made it to the victory stand.

To the BJP's credit, despite facing widespread anti-incumbency, it had consciously denied tickets to rabble rousers such as Anantkumar Hegde, C T Ravi, and B S Yediyurappa. Continuing to support popular leaders, such as Jagadish Shettar, and some old stalwarts, the BJP managed to retain key constituencies. The fact that Shobha Karandlaje, who faced "Go Back, Shobha" slogans in her earlier constituency (Udupi Chikmagalur) but won in Bengaluru North, indicates the consolidation of the BJP vote bank in key urban areas.

The JD(S)'s manipulation and betrayal of its secular credentials yielded mixed results. While Kumaraswamy, a former CM, rode on his Vokkaliga vote bank, the defeat of his

nephew, Prajwal Revanna, accused in serial rapes, is a victory for the discerning voters of Hassan constituency. In joining forces with the BJP, the JD(S) has reneged on its moral and political commitment to secularism and Karnataka's interests. But, it has also lost its credentials as a regional party and its leaders, especially Deve Gowda and his family, have lost their moral and social standing in the state.

But the election results cannot be read as a simple narrative of the BJP's hold over Karnataka as a "gateway to South India". Instead, the gains for the Congress are a reflection of growing democratisation and anti-RSS/BJP sentiment in Karnataka. Large swathes of people representing Dalits, farmers, and workers came together to articulate their resistance to the BJP's divisive agenda. Led by civil society organisations and networks that commendably put together a year-long campaign, voters voiced their grievances against price rise, unemployment and the spread of communalism. A key factor was also the step-motherly treatment that Karnataka was seen as receiving, especially in allocations of central funds. Women, especially the beneficiaries of the state government's "guarantees" (free electricity, free bus passes, monthly rations, monthly payments of Rs 2000), were ardent supporters of the INC. Much credit to increasing voter awareness and participation is owed to the Jamaat-e-Islami Karnataka, which worked in all parts of the state to ensure that Muslim

voters did not remain outside the fold of this democratic exercise. Articulations of the need to "save the Constitution" and to live by its principles were voiced by many Dalits whose organisations overrode their differences and joined civil society organisations to rescue democracy and Dalit rights. Farmers, who remained fragmented by region, caste and organisations, came together in a show of strength and, encouraged by the brave resistance of the Samyukt Kisan Morcha, declared their anti-BJP stand.

The mixed mandate in Karnataka indicates the rollback of the saffron agenda and the emergence of voices for federalism, communal harmony, and shared development. The fact that the INC did not receive another triumphant mandate may help balance its ambitions. Yet, decades of saffronisation in the state is a serious concern that needs to be addressed. Its consolidation in the urban belts, not only in Bengaluru but also in Mysuru and the Dharwad-Hubbali regions indicates upper-caste support for the RSS-BJP. The 2024 contest will be remembered not only as a closely-fought election but as one in which the people fought against forces that sought to divide and spread hate. It has been a time for the emergence of a more aware voter; one who demands a more dignified life and greater accountability from elected representatives.

The writer is a social anthropologist

JUNE 5, 1984, FORTY YEARS AGO

GOLDEN TEMPLE TERROR

TERRORISTS INSIDE THE Golden Temple complex and the security forces exchanged fire. A Home Ministry spokesman said the security forces posted around the Golden Temple came under fire from terrorists inside. The security forces returned the fire. The firing continued for about five hours in which one *jawan* was seriously injured. It was not known if there were any casualties inside the Temple.

EYE ON GURDWARAS

ARMY JAWANS RINGED a gurdwara in Rajpura district close to the Shambhu border

with Haryana, soon after the curfew came into force in Punjab. Local information suggested that other gurdwaras in the state were under similar surveillance. The curfew had apparently been enforced strictly. Army posts had been set up around the town, and Army patrols were mounted on the highways to check any significant violation of curfew orders.

DACOITS KILL COP

A SUB-INSPECTOR OF police, Jaswant Singh, was killed and a head constable, Malkiat Singh, seriously injured in an encounter with a gang of dacoits who were trying to escape after looting a bank of about Rs 4 lakh on New

Rohtak Road. The dacoits left the bag containing the loot and fled.

ON PUNJAB PRESS BAN

PREM BHATIA, PRESIDENT of the Editors Guild of India and editor-in-chief of the Tribune group of newspapers published from Chandigarh, has described the government ban on publication of news about the current Akali agitation in Punjab as a "massive dose of censorship". In a statement, Bhatia said journalists in Punjab and Chandigarh were virtually under "house arrest with the 36-hour curfew immobilising everyone." No newspaper had been published for two days.



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WHAT THE OTHERS SAY

"There is a lack of accountability pervading our law enforcement forces and institutions... Custodial torture is a betrayal of public trust... We demand a proper investigation into the death of Afroza Begum and all such cases by an impartial and independent body."
— THE DAILY TIMES, BANGLADESH

2024: Bharat and decolonisation

Political battles will occupy minds in the here and now. But the larger, long-term and all-important canvas is civilisation and culture



THE SIDEBAR
BY J SAI DEEPAK

AS OF 5:20 pm on June 4, 2024, while I pen this piece, the portal of the Election Commission of India shows the BJP leading in 241 constituencies and the Congress leading in 99. However, subject to the final result, the overall picture that may emerge is that the alliance in power will have enough to ponder over, while the alliance in the Opposition has enough to draw heart from. I am neither a trained nor functional psephologist. Therefore, I have no electoral *gyaan* to offer to either side. Where I stand as an individual is, perhaps, better captured by a brief correspondence exchanged between Dr Pratap Bhanu Mehta and myself in August 2021, shortly after the launch of the first book of my Bharat Tetralogy, namely *India that is Bharat: Coloniality, Civilisation, Constitution*.

Congratulating me on the book, Dr Mehta called it "powerfully written" and claimed to be impressed with the "clarity of the argument". He then went on to wonder why we agreed so much on history but differed on politics. The following was my reply to him:

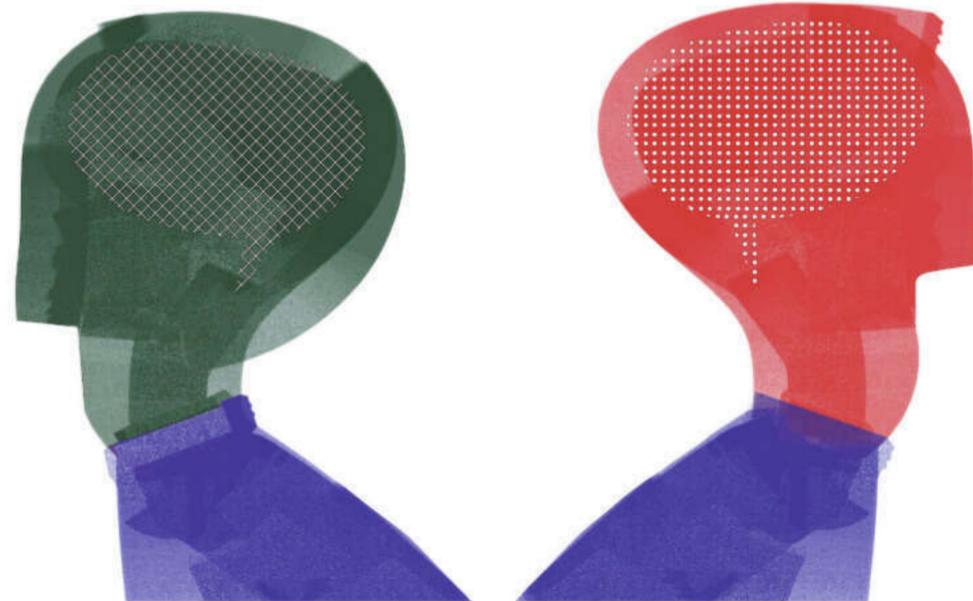
"Dear Shri Mehta,

Thank you for reading the book and for taking the time out to share your feedback. While politics is important, I am more interested in the framework within which it plays out and the end goals. Once again, thank you for writing (sic) and for your wishes.

Best Regards,
J Sai Deepak"

WITHIN TWO years, this is what Dr Mehta wrote in a piece that appeared in this publication ('We the decolonialists', September 1, 2023): "'Decolonise!' This imperative seems to be the ideological flavour of the moment. It is behind the calls to restructure education, to rewrite laws, reconceptualise history, reimagine public spaces, reclaim Indic consciousness, and even junk the Constitution. It is a loose intellectual movement, captured in big and widely circulated books such as J Sai Deepak's *India that is Bharat* or shorter polemics like Ambika Dutt Sharma's recent *Bharatiya Manas ka Vi-Uppniveshikaran* (The Decolonising of Indian Consciousness)..."

In stark contrast to his email of 2021, Dr Mehta also unequivocally labelled the decolonisation movement in Bharat an "insidious" project with an "exclusionary political agenda". What explains this change of position when barely two years earlier he had claimed to agree with me on history? Importantly, why is this significant in the backdrop of the elections of 2024? It is significant, not because of the individuals involved,



CR Sasikumar

but because of the deeper ideological divide that undergirds the political differences in Bharat. Critically, to me, and people like me, politics is not and will never be an end in itself — it is but a means to an end. It is part of a larger societal churn wherein there are, indeed, some on all sides who are interested in civilisational or ideological outcomes (as the case may be), with politics merely serving as a medium or conduit for delivery of their respective larger goals. This comes with the acknowledgement of the reality that not every direct political stakeholder is necessarily committed or even remotely interested in worldviews or ideologies. The meeting of minds between the two categories of stakeholders, the non-political and the political, is typically a matter of finding the maximum possible common ground, even if it is not the ideal for either. Given this real world position, I find it both amusing and convenient on the part of well-read and informed individuals such as Shri Mehta to take the position that while their movements are broad-minded, purely academic, neutral and ideological, the counterviews are frenzied and parochial political movements driven by a cynical lust for power.

At least now, one must accept that there has always been a clear ideological bias in pre- and post-Independence Bharat, which has been passed off as a neutral benchmark for others to live by. Almost no sphere or institution is an exception to this. If anything, the last decade has thrown this reality into sharp relief and perhaps for the first time, the lack of ideological diversity in policy-making institutions and opinion-shaping spheres was there for the public to see. This led to hitherto unknown and fairly scathing public criticism of an entrenched "establishment" whose foundations were

As a continuing student of history, I believe that those movements which depend primarily on society are bound to achieve their goals, compared to those which place all their eggs in the political basket. After all, society is not Plan B. It is the Plan A that creates and shapes the future. This holds good as much for those who wish to see a safer, more prosperous and stronger Bharat, as it does for those who wish to see the idea of Bharat disintegrate mentally and physically.

laid in 1947 and strengthened since 1952. The last decade finally saw the emergence of a vocal and confident alternative viewpoint, namely the native perspective, which was previously denied access to spaces and platforms, and whose existence was either denied or derided.

While political battles will occupy mind-space in the here and now, the larger, long-term and all-important canvas is consciousness, and hence civilisation and culture. Although some progress (not enough) has been made on this front in the last decade, thanks to diversity of thought being made possible by a "non-establishment" political vision, it remains to be seen whether "2024" enables or stifles the journey of the Bharatiya decolonisation movement. As a continuing student of history, I believe that those movements which depend primarily on society are bound to achieve their goals, compared to those which place all their eggs in the political basket. After all, society is not Plan B. It is the Plan A that creates and shapes the future. This holds good as much for those who wish to see a safer, more prosperous and stronger Bharat, as it does for those who wish to see the idea of Bharat disintegrate mentally and physically. The unrest created between 2019 and 2024 is a case in point for the latter. I, for one, will remain committed to the idea and reality of Bharat.

The writer is a commercial and constitutional litigator who practises as a counsel before the Supreme Court of India, the High Court of Delhi, the NCLAT and the CCI, and author of India that is Bharat: Coloniality, Civilisation, Constitution and India, Bharat and Pakistan: The Constitutional Journey of a Sandwiched Civilisation

The challenge for INDIA

The BJP has been cut down to size. For Opposition, this is not a victory, but an opportunity to define its politics



SUHASH PALSHIKAR

WHEN DRAMATIC EXPECTATIONS are set through media management, a setback looks like defeat. When parties and leaders are believed to be invincible, retaining power with constraints looks devastating. This is the BJP's predicament. After enjoying two consecutive terms with an unfettered majority, the BJP can now return for a third term with crutches. The outcome presents three complications.

First, the BJP's strength in the Lok Sabha will be reduced compared to the past five years. Two, in contrast, its vote share will remain robust. With a nearly 38 per cent vote share for the BJP, it would be ostrich-like to celebrate the outcome as a defeat. Third, to form the government and remain in power for five years, the party will have to strike many compromises — internally and among its allies — something its leadership seems incapable of. This could bring more intrigue, repression and revenge into our politics. While cutting the dominant party to size, the outcome may have posed a challenge before the country's bruised institutions and blinkered politicians.

As this writer has said repeatedly, Narendra Modi has been the main driver of the BJP's successes since 2014 and by implication, the under achievements too need to be laid squarely at his door. The BJP has built a gigantic electoral machine, but its energy comes from Modi. If the BJP's expansion in south India (not so much in terms of seats but vote shares) and east India is to Modi's credit, the setbacks elsewhere indicate the limitations of his appeal. It is necessary that "Brand Modi" is appropriately deciphered. Comprehending the meaning of Modi — the brand, the representation of something beyond Modi the person — can help us unravel three things: Even in its near-defeat, what the BJP has achieved so far, how and what this means for the India of tomorrow.

We must recognise that the BJP has fundamentally changed the terms of political discourse. It has also managed to ensure that economic hardship will be condoned in lieu of distant dreams and most importantly, that multiple fault lines, including economic ones, will be overwhelmed by a narrative of religio-cultural assertion. These elements were present in its 2014 victory but became more explicit in subsequent victories. They have brought the BJP and its now-less-needed mother organisation, the RSS, to an important milestone in the achievement of their century-long objective of making Hindutva the *lingua franca* of culture and politics in India.

Once we realise this core aspect of the BJP's contribution to politics, the explanations of the current electoral outcome can be fitted into the larger and historical shifts since the 1990s. Probably more than in any of the BJP's previous campaigns, this election saw harsh dog whistles and direct appeals to an aggressive religious identity. The Opposition made efforts to move the focus

to issues of distribution and social justice. That seems to have yielded limited results. The BJP responded to the Opposition campaign with shriller minority-phobia. That is where the relevance of Brand Modi needs attention. It articulated a package: A response to the social need to have a larger-than-life figure as saviour, a strong personality to ward off global challenges, a devout Hindu figure to satisfy the century-old aspiration to Hinduise society's power structure, a demagoguery to excite voters against the "other" and also a discourse directed at abstract ideas of becoming an economic powerhouse.

The Modi regime brought to the centre stage the twin factors of Hindutva and the personality cult. All other political moves and policy initiatives were subsumed by these two. The BJP has been cut to size in this election. But Modi is unlikely to give up on the personality cult and both he and the BJP are unlikely to give up on Hindutva. This poses an interesting moment of tension. We shall now witness the co-existence of a leader convinced of his divine role and a politics of more routine transactions and concessions. We shall also witness the co-existence of a political project of Hindutva that has tasted popular approval and what I have recently described as Hindutva fatigue. Evidently, a possible third term for the BJP signifies a deeper possibility for the future. It would be tough but tempting for the BJP to continue its assault on institutions and the project of undermining the Constitution.

At the same time, the Opposition will need to understand this outcome with caution. Silent disappointment about economic hardships may have put the BJP on the back foot, but the Opposition would be wrong to declare that the voters have rejected the BJP. This outcome poses a difficult challenge for it. The outward political expressions of hegemony may have been pushed back but the hegemony itself is not undone — the Opposition does not have the ideological wherewithal to counter it. With the BJP's reduced strength, the politics of isolating it may gain momentum. But the critical question is whether the non-BJP parties — in Opposition or power — have the energy and will to attack the BJP on a front where it is far too strong.

Ten years of the Modi regime have shown that irrespective of how the government handles the economy and the livelihood crisis, irrespective of how it walks roughshod over voices of dissent, a substantial segment of the citizenry continues to endorse the regime's foundational agenda. That agenda is not merely about the personality cult nor about trampling formal democratic norms. These are instruments of the core agenda of changing the character of the Indian mindset and bringing in a frightening religious and cultural transformation. A setback may not deter the BJP and may not win large segments away from that exclusionary agenda.

The outcome only opens up the possibility of staging a counter. Following its defeat, the BJP will resume its core politics from the next day. Will the non-BJP parties realise that this is not a victory for them but only an opportunity to define their politics sooner rather than later?

The writer, based in Pune, taught political science



NILESH SHAH

The show must go on

New government must aim for more investments, sustainable growth

THE ELECTION OUTCOME seems to be against the market and exit-poll expectations. But the show must go on. The incoming government should aim for a rapid increase in per capita GDP through inclusive and environmentally sustainable growth. The world is moving from globalisation to protectionism. Interest rates are likely to remain elevated. Fiscal stimulation will recede. Environmental considerations, along with technological disruptions, will adversely impact many businesses.

The following steps, by no means are exhaustive, can be considered.

One, disguised employment in the agriculture sector is a crucial challenge. We must create adequate employment opportunities in industry or services. Our manufacturing is burdened with higher power and logistics costs. Industrial power bears the subsidy of agricultural power. Commercial railway freight bears the subsidy of passenger fare. Due to fiscal constraints, agricultural power and passenger-fare subsidies couldn't be absorbed into the budget. Fortunately, the re-rating of PSU stocks has provided an option. The PSU market cap has increased significantly in the last three years. It offers an excellent opportunity to monetise, including the option of strategic investment to raise resources.

Two, there is a need to boost consumption at the bottom of the pyramid and in mass-market products. A gold monetisation scheme, which can bring gold locked in the *tijoris* (parallel economy) into the mainstream economy can raise additional resources to provide such a boost to the

economy, along with additional liquidity.

Three, agriculture will hold the key to creating inclusive and sustainable growth. The country became the largest producer of milk in the world through cooperative movements like Amul. This can be replicated in other commodities. Substituting imported agri products like palm oil, pulses, and dry fruits can create local opportunities. Focusing on exports of agro products and horticulture can support farmers. We should enter into a bilateral arrangement to trade food for oil. For example, Saudi Arabia can invest in the agriculture sector to secure its food supplies and provide us with a guaranteed oil supply.

Four, seek free labour movement with long-term work permits in our FTAs. We should provide preferential access to our markets on trade and investment in exchange for preferential access to our labour on long-term work permits. India is the highest recipient of remittances in the world. We should look to increase this through such access.

Five, provide skills through institutional mechanisms across India. For instance, the plumbing institute in Kendrapara, Odisha, can provide plumbers to India and the world.

Six, improve/launch PLI schemes to expand manufacturing jobs. For example, it makes commercial sense to export garments rather than yarn or fabric. This can create jobs, primarily for women workers. Processed agro products, automobiles, auto components, engineering, lab-grown diamonds, jewellery and shipbuilding can all be areas of focus.

Seven, services sectors like tourism, education and healthcare must be supported through integrated development. The Indian diaspora should be nudged to become brand ambassadors for tourism, education and the healthcare sector. India can provide quality healthcare at a low cost. Our citizens teach across universities around the world. An ageing world with an underfunded healthcare system is like the Y2K problem waiting to be solved by India.

Eight, growth requires investment. Our savings are frozen in real estate, gold, and currencies. We must unlock frozen savings through innovative ideas to ensure adequate domestic capital for our entrepreneurs.

Nine, investment requires the rule of law. Many investors prefer arbitration outside of India. Our judicial infrastructure is burdened. Investment should improve judicial infrastructure to reduce pendency and resolve cases faster.

Ten, investment requires the ease of doing business. Land acquisition remains a challenge. Labour laws, despite some reforms, pose a significant challenge. We must create special economic zones where one window clearance is available for setting up a project with labour laws comparable to other countries.

Eleven, in today's world of disruptive technologies, we must invest for the future. The vote on account proposed a fund for investment in future technologies. It should be operationalised quickly through public-private partnerships. The country should set up its own institute for artificial intelligence. The pharma industry should

be vertically integrated with large-scale fermentation plants and primary research institutes for new drugs.

Twelve, India, China and the US have become the engines of global growth. We remain one of the lowest per capita carbon emitters in the world. While we should follow a green growth model through renewable energy, we must seek compensation through technology/capital grants to create a level-playing field on per capita historical emissions. We must push carbon credit schemes and an emission tax on per capita and historical contributions.

Thirteen, land acquisition for mining is challenging in a populous country like India. Despite having large coal reserves, we import coal worth billions of dollars annually. We must create a responsible mining policy, balancing local and industrial interests.

Fourteen, we should leverage technology to provide quality education and healthcare solutions to citizens. A public-private partnership to keep government schools accountable locally can improve education significantly. DBT, through education coupons that can be encashed at a school, can enhance the quality of education.

Fifteen, Indians are good savers but not so good investors. Crores of Indians remain poor due to suboptimal savings allocation to cryptos, Ponzi schemes and derivatives trading. We must encourage investor education initiatives to ensure better financial awareness.

The writer is managing director, Kotak Mahindra AMC. Views are personal

LETTERS TO THE EDITOR

AKIN TO A DISASTER

THIS REFERS TO the article, 'Heat proofing the city' (IE, June 4). With temperatures reaching unprecedented levels, Delhi-NCR is grappling with an environmental crisis. This also poses significant public health risks. While climate change contributes to a rise in temperatures and humidity, factors such as the trapping of heat due to a dense concentration of buildings, paved roads, and other urban setups have been exacerbating heat stress. The frequency and severity of heatwaves will increase unless comprehensive mitigation and adaptation strategies are implemented.

SS Paul, *Nadia*

WORK FOR CITIZENS

THIS REFERS TO the article, 'The state we need' (IE, June 4). While attempts to synergise civil bureaucracy by skilling and training through programmes like Mission Karmayogi will enhance the quality of their professional outputs, there is also a need to refine their attitudes. A public servant must be self-motivated. There is also a need to combat rampant corruption. Interference by politicians at various stages of executions must also be eliminated to achieve the state our citizens need and deserve.

Shubhada H, *via email*

BEYOND ROUTINES

THIS REFERS TO the article, 'Before we burn out' (IE, June 4). We pride ourselves on working overtime every day, but does this benefit us? If hard work was the winning formula, then wage labourers would be our rulers. Work-life balance is a joke, with India outpacing the US, UK, and even China. Last year, India was the world's fourth-most vacation-deprived nation. Shouldn't Indians enrich themselves by adding recreation and community activities to our day? We need not just a prosperous working class, but also one which looks beyond passive, sedentary routines.

Sanjay Chopra, *Mohali*

Opinion

WEDNESDAY, JUNE 5, 2024



MESSAGE TO POLITICIANS

Politician and activist Yogendra Yadav

“The early poll trends are a big win for democracy. I hope this will hold and signal the powers in the country to work more honestly”

A RETURN TO DEMOCRACY

The election results have delivered a few hard knocks. The Modi-led BJP coalition should treat them as a wake-up call

THE MESSAGE FROM the 2024 Lok Sabha election results is unambiguous: The world's largest democracy deserves better than being made to worship any particular person or political party as some kind of a messiah. In any case, no political leader can be allowed unlimited free run in swallowing up all opponents and riding roughshod over all of civil society. But the Bharatiya Janata Party (BJP) tried to force us to believe that only their chosen one can have a claim on the throne. Since winning the 2014 elections, Prime Minister Narendra Modi had become a phenomenon, *Vishwaguru*, and even avatar. The entire strategy and architecture of the party's campaigns and actions were built around this. There was no Plan B or C because there was no scope for a contrarian view. In that sense, the latest results have normalised politics by bringing back checks and balances and accountability. It has also signalled a return to democracy — a prime minister can no longer be the monarch of all he surveys and has to now follow the coalition dharma. At the same time, the country has got a strong Opposition, which, hopefully, will be able to show the mirror to the ruling coalition instead of wasting time in internal bickering.

Taken in isolation, the BJP's performance after 10 years of governance has been creditable. Though its failure to reach the 272 mark has come as a rude shock, the party is comfortably placed to form the next government with the help of allies. But if the victory still seems like a defeat, it's entirely due to the arrogance the party displayed by claiming “*abki baar 400 par*”. The Opposition skillfully used that to bring a counter-narrative of fear by portraying such a brute majority as a precursor to changing the reservation policy and the Constitution. Modi perhaps realised this after the low turnout in the first two phases of the elections but made another mistake by opting for a highly aggressive, polarising campaign where the Congress leaders were accused of forcing the majority to give away their *mangalsutra* to people “with more children”. That's not the language that suits a prime minister who should address everyone as a stakeholder in democracy and celebrate rather than berate India's diversity.

There is no denying that Modi is still highly popular and his handling of the economy has been reasonably good despite the Covid-induced setbacks. But what remained hidden in the incessant chatter about India becoming the third largest economy was that the per capita income continues to languish. That figure rose from ₹72,805 in 2014-15 to ₹98,374 in 2022-23, at just a 3.83% compound annual growth rate, according to the government's own data. Since the impact of actual inflation is underestimated, the rise in per capita income would be even lower. The party probably got so caught by the glowing narrative of Viksit Bharat by 2047 that it wished away the rampant unemployment, inflation and income inequality — all encapsulated in two words “rural distress”. But these were the real issues facing the vast majority of India's population that lives in rural and semi-urban areas. After all, the slogan of Viksit Bharat means little to the 800 million still living on 5 kg rations doled out by the government every month.

However, not all is lost. As the new BJP-led coalition government comes back to power, the focus should go back to the fact that while it's good to have high economic growth, it is equally important to ensure that the fruits of the growth are spread widely. So reversing jobless growth is necessary so that so that young people, who are entering the labour force at the rate of 7-8 million per year, are able to find employment. One reason for low job creation is that the private sector is not investing enough in new capacity. Fresh investment announcements by the private sector fell 15.3% in 2023-24, while total fresh investment announcements, across government and private sector, dropped 4.8%, according to Projects Today, a web portal that tracks new projects. A trifecta of slow wage growth, elevated interest rates, and heavy borrowing by the average household has weakened the spending impulse of more than 300 million families that drives 70% of the gross domestic product. That also needs to be reversed. More importantly, one hopes the new government will focus a little more on social harmony and creating space for free exchange of ideas, apart from allowing institutions, which are the pillars of any democracy, to be their own masters. The election results have delivered a few knocks, but the BJP should treat them as a wake-up call.

IF THE VICTORY STILL SEEMS LIKE A DEFEAT FOR THE BJP, IT'S ENTIRELY DUE TO THE ARROGANCE THE PARTY DISPLAYED BY CLAIMING “ABKI BAAR 400 PAR”

POLITICAL BATTLES WILL OCCUPY MINDSPACE IN THE HERE AND NOW, THE LARGER, LONG-TERM AND ALL-IMPORTANT CANVAS IS CONSCIOUSNESS, AND HENCE CIVILISATION AND CULTURE

Bharat and decolonisation



J SAI DEEPAK

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AS OF 5:20 PM on June 4, 2024, while I pen this piece, the portal of the Election Commission of India shows the BJP leading in 241 constituencies and the Congress leading in 99. However, subject to the final result, the overall picture that may emerge is that the alliance in power will have enough to ponder over, while the alliance in the Opposition has enough to draw heart from. I am neither a trained nor functional psephologist. Therefore, I have no electoral gyan to offer to either side. Where I stand as an individual is, perhaps, better captured by a brief correspondence exchanged between Pratap Bhanu Mehta and I in August 2021, shortly after the launch of the first book of my Bharat Tetralogy, titled *India that is Bharat: Coloniality, Civilisation, Constitution*.

Congratulating me on the book, Mehta called it “powerfully written” and claimed to be impressed with the “clarity of the argument”. He then went on to wonder why we agreed so much on history but differed on politics. The following was my reply to him:

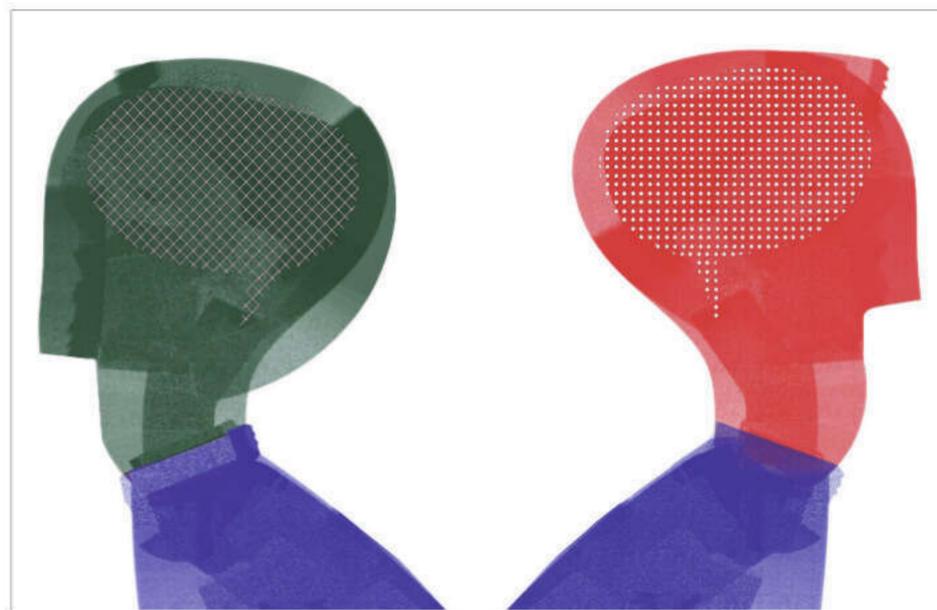
“Dear Shri Mehta,

Thank you for reading the book and for taking the time out to share your feedback. While politics is important, I am more interested in the framework within which it plays out and the end goals. Once again, thank you for writing (sic) and for your wishes.

Best Regards,

J Sai Deepak”

Within two years, this is what Mehta wrote in a piece that appeared in *Indian Express* (bit.ly/3X9tdNd): “Decolonise!” This imperative seems



CR SASIKUMAR

to be the ideological flavour of the moment. It is behind the calls to restructure education, to rewrite laws, reconceptualise history, reimagine public spaces, reclaim Indic consciousness, and even junk the Constitution. It is a loose intellectual movement, captured in big and widely circulated books such as J Sai Deepak's *India that is Bharat* or shorter polemics like Ambika Dutt Sharma's recent *Bharatiya Manas ka Vi-Upniveshikaran* (The Decolonising of Indian Consciousness)...”

In stark contrast to his email of 2021, Mehta also unequivocally labelled the decolonisation movement in Bharat as an “insidious” project with an “exclusionary political agenda”. What explains this change of position, when barely two years earlier, he had claimed to agree with me on history? Importantly, why is this significant in the backdrop of the elections of 2024? It is significant not because of the individuals involved, but because of the deeper ideological divide that undergirds the political differences in Bharat. Critically, to me, and people like me, politics is not and will never be an end in itself — it is but a means to an end. It is part of a larger societal churn wherein there are, indeed, some on all sides who are

interested in civilisational or ideological outcomes (as the case may be), with politics merely serving as a medium or conduit for delivery of their respective larger goals. This comes with the acknowledgement of the reality that not every direct political stakeholder is necessarily committed or even remotely interested in worldviews or ideologies. The meeting of minds between the two categories of stakeholders — the non-political and the political — is typically a matter of finding the maximum possible common ground, even if it is not the ideal for either. Given this real-world position, I find it both amusing and convenient on the part of well-read and informed individuals such as Mehta to take the position that while their movements are broad-minded, purely academic, neutral, and ideological, the counter-views are frenzied and parochial political movements driven by a cynical lust for power.

At least now, one must accept that there has always been a clear ideological bias in pre- and post-Independence Bharat, which has been passed off as a neutral benchmark for others to live by. Almost no sphere or institution is an exception to this. If anything, the last decade has thrown this reality into sharp

relief, and perhaps for the first time, the lack of ideological diversity in policy-making institutions and opinion-shaping spheres was there for the public to see. This led to hitherto unknown and fairly scathing public criticism of an entrenched “establishment”, whose foundations were laid in 1947 and strengthened since 1952. The last decade finally saw the emergence of a vocal and confident alternative viewpoint, namely the native perspective, which was previously denied access to spaces and platforms, and whose existence was either denied or decried.

While political battles will occupy minds in the here and now, the larger, long-term, and all-important canvas is consciousness, and hence civilisation and culture. Although some progress (not enough) has been made on this front in the last decade, thanks to the diversity of thought being made possible by a “non-establishment” political vision, it remains to be seen whether “2024” enables or stifles the journey of the Bharatiya decolonisation movement. As a life-long student of history, I believe that those movements which depend primarily on society are bound to achieve their goals, compared to those which place all their eggs in the political basket. After all, society is not Plan B. It is the Plan A that creates and shapes the future. This holds good as much for those who wish to see a safer, more prosperous and stronger Bharat as it does for those who wish to see the idea of Bharat disintegrate mentally and physically. The unrest created between 2019 and 2024 is a case in point for the latter. I, for one, will remain committed to the idea and reality of Bharat.

I BELIEVE THOSE MOVEMENTS WHICH DEPEND PRIMARILY ON SOCIETY ARE BOUND TO ACHIEVE THEIR GOALS, COMPARED TO THOSE WHICH PLACE ALL THEIR EGGS IN THE POLITICAL BASKET. AFTER ALL, SOCIETY CREATES AND SHAPES THE FUTURE. THIS HOLDS GOOD AS MUCH FOR THOSE WHO WISH TO SEE A SAFER AND STRONGER BHARAT AS IT DOES FOR THOSE WHO WISH TO SEE THE IDEA OF BHARAT DISINTEGRATE

BJP's rise in South and fall in North

THE VOTERS OF India delivered a victory to Prime Minister Narendra Modi and the Bharatiya Janata Party (BJP) in the 2024 parliamentary election. Although the BJP lost a number of seats, the National Democratic Alliance (NDA) crossed the majority number needed to form a government at the Centre. The BJP also increased its vote share from 2019 in states like Kerala and Tamil Nadu. Winning in Kerala is historic not only for the BJP but also for electoral democracy in South.

The second feature of the election results is that the BJP has expanded its influence in South Indian states by breaking a stereotype of being a party of the North, especially the Hindi heartland. The BJP and NDA got an impressive numbers of seats in Andhra Pradesh and Telangana. These states have now emerged as areas of political possibility for the BJP. It may try harder to take root in states such as Andhra Pradesh and Telangana. Tamil Nadu and Kerala have usually been antithetical to BJP's political philosophy of Hindutva, the Hindi language, etc. which are intertwined with the party's image. These two states have also posed a counter to the Ek Bharat Shreshtha Bharat campaign of Modi and the BJP. So gaining ground there is needed for a perceptual shift. Modi worked hard to give symbolic, substantial importance to Tamil Nadu during his second tenure. His govern-

ment and ministries together organised programmes to include Tamil Nadu in parts of the North. His social welfare schemes created a beneficiary community in Tamil Nadu, and before the election the PM drew admiration from people in some villages.

Third, the BJP performed extremely well in Odisha. Its rise can be attributed to four reasons. Modi's emergence as a star attraction for the people; the issue of Odia identity raised by Modi and party leader Dharmendra Pradhan; growing interest among youths towards government schemes and aspirations for Viksit and Digital Bharat. The BJP has built a political anchor like Pradhan who organised the poll campaign on Modi's image, Odia identity, and the dream of Viksit Bharat.

West Bengal results show that Mamata Banerjee retains her hold on the public and politics. The BJP lost an opportunity to expand in the state. It could not successfully mobilise voters against Mamata's allegations of corruption that it levelled against the Trinamul Congress leader. It also failed to convert the anti-incumbency against Banerjee, and in translating Modi's image into votes.

In North India, the BJP suffered significant losses in Haryana, Rajasthan, and especially Uttar Pradesh. In UP, it may have had to contend with incumbency of local candidates. The Indian National Developmental Inclusive



BADRI NARAYAN

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VIEWS ARE PERSONAL

IN NORTH INDIA, THE BJP SUFFERED SIGNIFICANT LOSSES IN HARYANA, RAJASTHAN, AND ESPECIALLY UTTAR PRADESH. THE INDIA BLOC DIVERSIFIED ITS SOCIAL ALLIANCE BY GIVING REPRESENTATION TO NON-YADAV OBCs



AP/MANISH SWARUP

Alliance (INDIA) diversified its social alliance by giving representation to non-Yadav Other Backward Castes (OBCs) and most backward communities. This was an election of images, not narratives. The narratives of both NDA and INDIA kept changing in a matter of days. The bulk of the public went in favour of Modi, showing confidence and faith in his development designs and governance model. He has acquired credibility as a doer, and not

only a man of words. The inauguration of the Ram temple, abrogation of Article 370, Citizen (Amendment) Act etc. all added to his credibility.

Also, the beneficiary factor worked for marginal communities such as Dalits, tribals, most backward castes, and women in mobilising them. The beneficiaries of welfare schemes like free ration, Ujjwala yojana, Ayushman card and direct benefit transfer was an anchor

for the BJP. With the party cadre maintaining a constant connect with them, it reoriented the beneficiaries as voters. Even then, the opposition strategy of a revival of caste identity by raising social justice issues appears to have paid dividends, especially in UP. The narrative that the INDIA bloc tried to weave around the Constitution (in danger), caste census, and reservation impressed a section of OBCs and Dalit communities. Rahul Gandhi's image also acquired greater acceptance, the results suggest.

I would conclude with three important points. First, I observed how the use of electronic voting machines (EVMs) prevented booth capture, empowering the subaltern in taking part in this festival of Indian democracy. A study by economist Shamika Ravi that analysed data shows that EVMs helped enhance the participation of women and other vulnerable sections. Secondly, in my view, Modi's image worked as a big anchor across India and turned possible defeat of many BJP candidates into victory. Thirdly, it has cultivated a possibility of territorial as well as demographic expansion in southern India. Lastly, the BJP will likely have to respond to new challenges that the INDIA bloc has posed.



INDIAN EXPRESS IS NOT AN INDUSTRY. IT IS A MISSION.

— Rammath Goenka

STUNNING MANDATE PUTS QUESTION MARK ON MODI 3.0'S STABILITY

A stunning mandate delivered by the silent voter tore off the mask of invincibility around the BJP, reducing it to the single largest party in the Lok Sabha but short of majority. That the opposition's combined vote share was better than the ruling party's was always known. But their ability to unite was suspect, which is why the BJP managed some stellar victories at earlier hustings. In hindsight, the arrogance of the ruling side that sent the hounds of central law enforcement agencies after opposition leaders became a cementing force for the INDIA bloc. Their coalescence was most pronounced in Uttar Pradesh, where they transferred votes seamlessly to their allies, making the Samajwadi Party the single largest party in the state. While the SP became the game-changer, the Congress too gained seats in UP. Chief Minister Yogi Adityanath, a probable BJP prime ministerial candidate in the future, lost face. But it was Brand Modi that suffered a body blow, as he made the elections presidential and set a 370-seat target for his party and 400-plus for the ruling NDA. The law of diminishing returns caught up with him and pushed his party off its high pedestal.

After a decade of underwhelming performances, the Congress redeemed itself, picking up seats in Haryana, Rajasthan, Tamil Nadu, Telangana and Karnataka. It swept Kerala and Punjab, but was drowned in Delhi despite the alliance with the ruling AAP there. Rahul Gandhi won handsomely from Wayanad and Rae Bareilly. His nominee in Amethi, Kishori Lal Sharma, became a giant killer, trouncing the BJP's feisty Smriti Irani. The Trinamool Congress in West Bengal contributed to the INDIA bloc's kitty, as did the DMK in Tamil Nadu and the Maha Vikas Aghadi in Maharashtra. In the process, Mamata Banerjee's sharpest opponent and Bengal Congress chief Adhir Ranjan Chowdhury and BJP's poster boy in Tamil Nadu, K Annamalai, got a pasting.

The BJP's biggest gain was in Odisha, where it wrested power in the state assembly too. And its NDA alliance in Andhra Pradesh, led by the TDP, pulled off an upset victory. Besides, the JD(U) fared better than expected in Bihar, making its leader Nitish Kumar and TDP chief N Chandrababu Naidu kingmakers. Running a government with shifty partners like Naidu and Nitish can be difficult at the best of times. So far, Modi has not led a coalition where the allies have had a big say. As it is, the opposition is trying to bait Naidu and Nitish. Nitish had taken a dim view of the Citizenship (Amendment) Act before re-joining the NDA, though Naidu was agreeable on it. Naidu is against disturbing the 4 percent Muslim quota in Andhra Pradesh. And two leaders' views on the ambitious 'one nation, one poll' agenda is at best hazy. Whether a Modi 3.0 government will be stable enough to usher in the big-ticket reforms he promised remains to be seen.

LESSONS IN COALITION POLITICS FROM ANDHRA, ODISHA FLIPS

A tectonic shift in the electoral landscape has sunk two popular chief ministers, one of whom was within handshaking distance from making history. Naveen Patnaik, the Biju Janata Dal supremo and Odisha chief minister for 24 years, was given a rude shock by voters who sent his party packing. From 113 assembly seats in 2019, the BJD slumped to 51 as a super-charged BJP breached the magic halfway mark of 74. The defeat in the Lok Sabha polls was even more hurtful—the state's ruling party has been reduced to just one seat, with the BJP romping home in 19 out of the 21 constituencies.

In neighbouring Andhra Pradesh, the Telugu Desam-Jana Sena-BJP alliance routed the YSR Congress and looked set to win 164 of the 175 assembly seats at the time of going to press. The script was similar in the parliamentary polls, where the TDP-JSP-BJP combine looked set to win 21 out of the 25 seats with the YSRC left to lick its wounds with just four. Jagan's over-reliance on a volunteer scheme instead of putting faith in the party cadre, his welfarism and reckless changes during candidate selection (he shuffled 82 candidates) proved to be his nemesis. If that was not bad enough, the arrest of TDP boss N Chandrababu Naidu turned the tide of sympathy.

On his part, Naveen ignored the writing on the wall. The disaffection among constituents was palpable after 24 years of his rule. But he took his electorate for granted, presuming the freebies would see his party through for a record sixth time. Over-reliance on V K Pandian, his close confidant of non-Odia provenance, eventually ended Naveen's run. Pandian could be seen as the main cause that prevented Naveen from riding into the sunset in glory. The bureaucrat-turned-politician made the state's twin elections all about himself and gave the BJP its most potent weapon, the outsider factor.

Not long ago, both the chief ministers were unofficial allies of the BJP; but the saffron party eventually ensured their ouster. Now all eyes are on Naidu. He is riding in on public sympathy after his arrest, having ensured that his pact with Pawan Kalyan's Jana Sena translated into a smooth transfer of votes. His articulation of Andhra Pradesh's development plan was clear, too. With a huge majority in the assembly and in a kingmaker's position in the NDA, the TDP boss can have a few takeaways from Odisha on how coalition dharma can change. Unlike Naveen, Naidu has always nursed a national ambition. However, his on-and-off relationship with the BJP will infuse an element of suspicion between the partners. How coalition dharma plays out, with the BJP now on a significantly weaker ground, will determine the next government's ability to last a full five-year term.

On par with Jawaharlal Nehru. That bridge has been crossed for Narendra Modi, but as part of a political bargain whose cost cannot be entirely calculated at present. The river underneath flowed in strange ways. Rather than an enhancement of stature, it is the shadow that lengthened—of a doubt about his continuance that was unthinkable just the other day. The figure itself stood diminished in victory, when set against the will of the people. Which is not inappropriate in a democracy.

The safe passage to the other side of the bridge has brought one of modern India's biggest leaders face to face with a somewhat alien landscape. These were not the results the BJP and its totemic captain had expected when the script was conceived and rolled. The Lok Sabha election of 2024 contains such a collection of novel factors that it is certain to go down as a landmark in the evolution of Indian politics. More than that, it is an event whose meaning will perhaps still be revealing itself years from now.

The first set of factors—unforeseen to those whose vision was fixated at the macro level, but a rational deduction for keener eyes—relates to the ruling BJP and the titanic figure who has become near-synonymous with its epoch of unmatched power. PM Modi now comes into his third term with a vastly reduced quantum of public consent, and it is not a familiar place for him. He has always wielded power from a locus of unquestioned mass approval. Coalitions have been unpleasant exigencies, never a natural way of politics.

Now, with the BJP reduced to a seat share that's well below the majority mark, Modi and his strategist-in-chief, Union home minister Amit Shah, will be coaxed into more accommodative stances than they have been used to. That too with hard-core transactional leaders like Chandrababu Naidu and Nitish Kumar, who have both managed to extract a rich larder for the winter of their political lives.

How the Modi-Shah duo adjust their politics will be crucial to how the BJP looks forward to the future. The party, once a tight and cohesive political formation with a distinct identity and a leaning towards organisational primacy, is a vastly bigger entity now but also one with a receding resemblance to its old being. Turncoats from other parties fill its leadership ranks, and the strain this has been causing vis-a-vis the old cadre has

India's tryst with destiny was not meant to be a singular event but a process, composed of & by vox populi. Election 2024 inaugurates a new movement in that unfolding symphony

INDIA RENEWS ITS PASSPORT TO DEMOCRACY



SANTWANA BHATTACHARYA Editor



SOURAV ROY

been becoming quite perceptible of late. There is also the related question of a string of senior leaders caught in various degrees of distance and estrangement from the centre: Shivraj Singh Chouhan, Vasundhara Raje most visibly, but perhaps a few more important ones. The relationship with the RSS will also be up for some refinement. And all this will have to be conducted with less latitude for exuding or wielding absolute power.

The real renaissance has happened on the other side of the political fence. The Congress, for long sunk in a swamp of political decay and an idea famine, had been regularly threatening to go into the past tense. The only debatable point about the phrase 'Grand Old Party'

seemed to relate to the first word there, as defeat after demoralising defeat seemed to come like lines in a long epiphany. And Rahul Gandhi, the fifth-generation leader from a family associated with the party for a century, had been damned by popular consensus as singularly incapable of turning things around despite being a man of good intentions.

Indeed, as races go, he started with a negative headstart of miles. He covered some of those through a hard trek across India. But it was not just movement in space. It is Rahul's daring ideological makeover—rather, an organic evolution into borderline radicalism—that has upended Indian politics. This happened through an infusion of urgent themes related to subaltern India—

which is to say, most of India. To see that it was timely, high time actually, one only needed to look at where India was figuring on world inequality indices. In a sense, Rahul Gandhi's appearance with a long-term manifesto of egalitarianism in both class and caste terms—which he calls his "life's mission"—turned him into an instrument for a historical necessity. He may have landed short of an actual entry into the government's decision-making apparatus for now, but the decisions that flow from there cannot now be entirely immune to the themes he has brought to the table.

To say it simply, Rahul Gandhi can now justly claim that he has to be taken seriously as a leader. To come from so far behind, with a rickety and pauperised party with fickle leaders, and get so close to felling a giant who was said to be unbeatable is proof enough: Pappu can dance. The proof also lies in how India came this close to having its first Dalit prime minister in Mallikarjun Kharge, whose near-leonine presence at the top of the party hierarchy is not discounted as a factor that enabled voting patterns to shift.

There were of course many other actors and events in this epochal election. The BJP's ingress into newer territories in the east and south inaugurates fresh chapters. In sheer quantitative terms Samajwadi Party chief Akhilesh Yadav comes first—having carved away more than half of India's biggest political state, Uttar Pradesh. The Dalits of UP voting for the SP's bicycle perhaps merit special attention. Add non-Yadav OBCs and even the privileged castes, and you see that the Congress did not merely benefit in the company of regional parties, it also brought a new possibility of cohesion. Bengal's electorate, on the other hand, stayed like a solid monolith behind Mamata Banerjee.

Each of these, and many other micro-narratives, will call for individual interpretation. But the grand narrative this time belonged not to parties. For the real scriptwriters will stay anonymous: the millions and millions of voters who crossed many lines to inscribe a new future for themselves. "The past is a foreign country," goes a famous old line. If the future looks alien to some, it is only the force of habit they have cultivated. That may now have to be shed. Consensus has been a scarce commodity of late, but on this a fresh start can be made: democracy has won.

(Follow her on X @santwana99)

CRUNCHING THE NUMBERS FOR AN EVOLVING SOUTH

The more things change, the more they stay the same. The dictum may not be true for the larger national mandate, but the electoral landscape of the south indicates a sense of continuity amid the larger landscape of change.

Factor in the interplay of continuity and the change—compared to 2019, the vote share and seat tally of the BJP and the NDA, Congress and INDIA parties along with other regional parties changed at the state level.

In Tamil Nadu, where the BJP decided to go without the AIADMK, it has failed to win even a single seat, but, at the same time, it secured about 11 percent votes on its own. The state gave an almost clean sweep to the DMK-and-Congress-led alliance. Similarly, in neighbouring Kerala, while the BJP won one Lok Sabha seat for the first time and partially increased its vote share from 13 percent in 2019 to around 17 percent in 2024, the overall mandate remains almost the same.

Karnataka is a mixed bag this time. In the backdrop of the whopping majority the Congress got in May 2023, its performance is below the expectation as it won nine out of the state's 28 parliamentary seats. However, the party's vote share increased by almost 14 percentage points. Therein, BJP contested three fewer seats this time but lost around 6 percent of the votes apart from losing eight seats.

Move slightly north to Telangana and Andhra Pradesh, and the picture shifts qualitatively for the BJP. In Telangana the saffron party doubled its seat tally, from four in 2019 to eight in 2024, while its vote share increased from 20 percent to 35 percent. The same was true for the Congress. The grand old party increased its seat tally from three to eight Lok Sabha seats and had a 10 percent rise in its vote share. The absolute loser there is the regional party Bharat Rashtira Samithi, which failed to win a single seat and lost around 25 percent of its votes.

If Telangana is about the electoral marginalisation of the regional party, the story in Andhra remains a saga of contestation between the two state parties, the YSR Congress and the Telugu Desam Party, where the two national parties, the BJP and the Congress, are marginal players.

The YSR Congress, which had won 22 seats out of Andhra Pradesh's 25 seats in the 2019 Lok Sabha election, could win just

four seats this time, while its vote share fell from around 50 percent to 40 percent—a massive fall. On the other hand, TDP's hiatus from power ended after a decade as it secured a whopping majority

CHANGING FORTUNES IN THE SOUTH			
State	Party	LS 2019 vote share %	LS 2024 vote share %
KERALA	Cong	37.5	35
	CPM	26	25.8
	BJP	13	16.7
KARNATAKA	BJP	51.8	46
	JD(S)	9.7	5.6
	Cong	32.1	45.4
TELANGANA	BJP	19.7	35
	Cong	29.8	40.1
	BRS	41.7	17
	AIMIM	2.8	3
ANDHRA	BJP	1	11.31
	TDP	40	37.8
	JSP	6	NA
	YSRC	50	39.6
TAMIL NADU	Cong	1	2.7
	DMK+	53	49
	AIADMK	19	21
	BJP+	3.6	11

While NDA's tally in the southern states increased from 30 seats in 2019 to 41 in 2024, the BJP's tally remained the same at 29. Karnataka, Kerala and Telangana rewarded national parties at the cost of regional ones, whereas the reverse trend played in Telangana & Andhra

in the state assembly election, besides catapulting NDA's tally there to 21 seats.

Overall, while NDA's tally in the southern states increased from 30 seats in 2019 to 41 seats in 2024, BJP's overall tally remained the same at 29. Nevertheless, the fixity of the BJP's seat tally has a subtlety too. Now the BJP is a significant presence in all the southern states, rather than being a player just in Karnataka.

From the INDIA bloc's point of view, the south has been a big gain. Their tally increased from 58 seats in 2019 to 74 in 2024; the Congress also increased its seat tally from 27 to 40.

While the southern states have their own specificities, the overall trend in the region ends up confirming the trends in other regions. If Telangana and Andhra emerged as swing states in favour of the BJP, Karnataka have a dent to the party vehicle, and Kerala and Tamil Nadu may now be seen as future catchment areas.

So the 2024 electoral verdict presents a broad shift in the political dynamics in the south. There are two visible trends. First, three states—Karnataka, Kerala and Telangana—are rewarding national parties at the cost of the regional ones. The sad state of the BRS and JD(S) are cases in point. This shift also indicates the integrative drive of the southern states, where they are letting go of the parties which once were the votaries of regional identities and interests. However, Andhra Pradesh and Tamil Nadu throw up a different picture in which the national parties have been either at the margin or play second fiddle to dominant regional parties. The alternating stint in power between the YSR Congress and the TDP is likely to stay in the near future in Andhra. The DMK remains a hegemon in Tamil Nadu while the AIADMK has shown it still has a formidable vote share. The failure of the BJP to wean away AIADMK votes maintains the regional-party-centric character of the state.

Further, the 2024 strategy for the BJP in Tamil Nadu, where the party decided to break its alliance with the AIADMK, was considered by many as a bold move signifying their intent to make the electoral battle an ideological one. By winning 11 percent of the votes, though the party may feel motivated for a future endeavour, the verdict makes things ambiguous for the party in the immediate run.

While the southern states have their individual specificities, the region is very much in sync with the cluttered template of other regions. Hence, the framing of Indian politics as a binary of north vs south paradigm may be more of a cliché than the ground reality.

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WRITE TO: letters@newindianexpress.com

Coalition government

The 2024 Lok Sabha election results are astonishing. It swept away all the promises laid out by exit polls. The country is heading to a coalition government, which one did not expect.

Gokul Krishna, Kottayam

Intelligent voting

The counting gave quite a nail-biting experience, with surprises and shocks all through. But one aspect that clearly comes out is that, by and large, people have chosen good candidates over parties, which is quite a positive sign. In a nutshell, the people have given an intelligent and thought-out verdict, not one based on emotions and favouritism.

Vijay Shekhar, Chennai

Reviving democracy

The poll results have defied the speculation of a majority of exit polls. With no party gaining individual majority, it offers a fertile ground to revive parliamentary sovereignty that was in peril over the years. It would be prudent if effective deliberations take place in the parliament and decisions are taken by consensus. This also corroborates that too much centralisation sidelining regional aspirations, invoking religious sentiments of the people and polarising the masses does not last long in a diverse society like India.

M Rishidev, Dindigul

Self damage

The rehabilitated performance of the Congress in the elections suggest a return of power for the party may have been on the cards, which was blown away by avoidable infighting and despicable hate speeches. The result is also a wake up call to Narendra Modi, certain comments of whom were grossly undesirable.

Sanath Kumar T S, Thrissur

Strong opposition

The results are encouraging for the Congress party. Rahul's Bharat Jodo yatra seems to have paid him decent dividends. Loss of seats in UP and Maharashtra is a jolt to the BJP. We will have a strong opposition now compared to 2014 and 2019. Hope Rahul and the Congress do well as a responsible opposition this time, winning the hearts of the people at large.

Sravana Ramachandran, Chennai

Unnecessary tension

Going by the results, exit polls have lost their relevance. As per exit polls, the NDA was to have crossed 350 seats. But they failed to reach even 300 seats. It is time the government banned exit polls so that unnecessary tension among parties and the public can be avoided.

S Ravindranath, Begaluru

The Tribune

ESTABLISHED IN 1881

India's message

Reality check for BJP; Oppn makes big gains

LOUID and clear is the message conveyed by India's voters to Prime Minister Narendra Modi — never take us for granted. The BJP-led NDA has managed to get the better of the INDIA bloc in the 2024 General Election, but its victory was anything but emphatic. The landslide predicted by the exit polls failed to materialise; the ruling alliance's 'abki baar 400 paar' slogan remained just that — a slogan. The BJP's all-out attempts to bulldoze the Opposition into submission largely came a cropper as the Congress-spearheaded bloc put up a spirited fight. And at the end of the day, PM Modi didn't look all that mighty — for a change, he would have to rely heavily on regional satraps like Nitish Kumar and N Chandrababu Naidu to keep his government intact.

The BJP, in its heart of hearts, knew that a few influential allies would come in handy when the going got tough. No wonder Bihar CM Nitish's Janata Dal (United) returned to the NDA fold in January, while the Naidu-led Telugu Desam Party forged a tie-up with the BJP in March. The BJP has done well to upset Biju Janata Dal's appellation in Odisha and made major inroads in the South, but the reversals in Uttar Pradesh have left it shell-shocked. The inauguration of the Ram Mandir in Ayodhya was projected by the BJP as the high point of the PM's second term, but even this momentous event did not work wonders for the saffron party in UP, easily India's most important state in political and electoral terms. The Samajwadi Party-Congress combine turned the tables on the BJP with a remarkable performance. The beleaguered grand old party — which was in danger of losing its pre-eminence within INDIA — bounced back with a vengeance to nearly double its 2019 nationwide tally.

The good news for Indian democracy is that the country is in no danger of becoming Opposition-mukt. The BJP is likely to be kept on its toes not only by its allies but also Congress and Co. Socio-economic issues such as unemployment, inflation and growing inequality, which played a significant role in influencing voters' choices, will have to be addressed on priority by the new government.

Shifting sands

A vibrant political mix in the region

BAGGING seven of the 13 Lok Sabha seats in Punjab, the Congress has made a comeback in the state after the debacle in the 2022 Assembly polls, even as the ruling Aam Aadmi Party has managed to win three seats. The overall picture suggests a fragmented yet vibrant polity. The SAD has won just one seat, claimed by Harsimrat Kaur Badal, while the BJP has drawn a blank, even as Punjab's farmers continue to be at loggerheads with the Centre. By electing independent candidates Amritpal Singh (the jailed chief of Waris Punjab De) and Sarabjeet Singh Khalsa (son of an assassin of Indira Gandhi), who have made their presence felt as radicals, voters of Khadoor Sahib and Faridkot have sent out a firm message to the powers that be: it would not brook alleged injustice with the sons of Punjab who have been languishing in jails and that the 1984 anti-Sikh pogrom remains a flashpoint in the absence of closure that can be ensured only by punishing the guilty. The mandate does not necessarily mean that people are backing separatism.

Meanwhile, Haryana has thrown up a mixed outcome, with the Congress clawing back into political prominence by winning half of the 10 LS seats and the ruling BJP settling for the rest, nowhere near the clean sweep of 2019. It reflects anti-incumbency and the BJP's failure to address the burning issues of inflation and joblessness.

Himachal Pradesh has witnessed a saffron sweep as the BJP won all four seats, even as the Congress wrested the Chandigarh seat from the BJP with a slender margin.

ON THIS DAY... 100 YEARS AGO

The Tribune.

LAHORE, THURSDAY, JUNE 5, 1924

Hindu-Muslim tension

THE current issue of *Young India* has a remarkable article from the pen of Mahatma Gandhi. It is a fairly long article, but by no means too long, considering the nature of the subject (Hindu-Muslim tension) and the variety of its aspects. With his great mastery of the art of condensation, it would, indeed, have been strange if the Mahatma had made the article longer than it was necessary to make it. As it is, the prevailing feeling in the mind of the reader when he has gone through the 10 pages of *Young India* is not that the Mahatma has said too much, but that on certain aspects of the problem, which he justly describes as the question of questions, he has said too little. This is particularly so as regards the solution of the problem which the Mahatma offers after discussing it in all or most of its bearings. The impression left on the mind of a careful and unbiased reader of this part of the article is that the advice which the Mahatma gives to the parties concerned is too general and also too meagre, and that on the whole, with all the pains he has taken to lift the problem to a higher plane, he has not been able to bring its solution perceptibly nearer. It is not always, it must be said, that the Mahatma's writings or speeches are open to this precise charge. What, then, is it that makes the article so notable a contribution to our current political literature? The answer, in our opinion, is that it is a patient, highly comprehensive and dispassionate analysis of a very difficult, very complex and very delicate subject.

Modi's grand dream turns sour

His policies and divisive politics have contributed to the Congress' revival

SANJAYA BARU
SENIOR JOURNALIST

MARTIN Luther King Jr had a dream. Xi Jinping had a dream. Going into the campaign for this year's Lok Sabha elections, Narendra Modi, too, had a dream. He imagined 400-plus seats for the National Democratic Alliance (NDA). This week, the dream went sour. In 2014, Modi's major political contribution was to revive the Bharatiya Janata Party (BJP). In 2024, his biggest political contribution has been the revival of the Indian National Congress.

Of course, Rahul Gandhi came into his own with his Bharat Jodo Yatra and Mallikarjun Kharge provided mature and wise leadership. But the policies of Modi's second term and the politics of his divisive and low-level electoral campaign played their part in the revival of the Congress' fortunes. Modi launched the 2014 election campaign declaring that he would make India 'Congress-mukt'. At the end of the 2024 polls, the party should thank him for doing his bit in its revival. A younger, youthful and energetic Congress has emerged from a decade of being on the back foot.

Modi is on course to make history with a third term as prime minister. The question is: What would a weaker Modi mean for the stability of a Modi-led NDA government? More importantly, what would an NDA government dependent on allies like N Chandrababu Naidu and Nitish Kumar mean for policy? Modi's 'guarantees' were for a Modi government. Neither



BELOW PAR: The 2024 poll verdict is a wake-up call for Modi and the BJP. PM

Naidu nor Nitish are ideologically inclined towards that agenda, even if the pursuit of power keeps them on Modi's side. But, would it?

June 2024 feels very much like May 2004. Every political analyst and pollster predicted victory for the NDA under the leadership of then Prime Minister Atal Bihari Vajpayee. When the results came in, the stock market took a deep dive. Within hours, a new alliance, the United Progressive Alliance, was cobbled together, and with the outside support of the Left Front, a government was formed under the leadership of Manmohan Singh. Modi is not a Vajpayee, even if Amit Shah is a Pramod Mahajan. Vajpayee stepped back. Will Modi and Shah step back? After all, the election campaign was about 'Modi ki Guarantee'. Is an NDA government willing to honour his guarantees?

The nation has thrust an important duty on Naidu and Nitish. Neither has proved to be a man of integrity or vision. Both have been self-serving and desperate for power. Yet, history has a strange way of demanding heroism from ordinary people. Recall how PV Narasimha Rao was assigned that role by fate and pol-

A younger, youthful and energetic Congress has emerged from a decade of being on the back foot.

itics. On the verge of political retirement, packing his bags to become a *pujari* in a temple, Rao was not only made PM but also tasked with taking decisions that changed the course of the country's destiny. Can Nitish and Naidu play such a role as junior partners of a government dominated and controlled by Modi and Shah? Hardly. They would be kept in check on a daily basis by all the institutions at the command of the PM.

To avoid that danger to their personal and political careers and, more importantly, in the larger interests of the country and its federal structure, the least Naidu and Nitish should demand is that one of them gets the home

ministry and the other gets finance. Surely, the INDIA parties, potentially with Kharge as the PM, may well be willing to give those two portfolios to these two gentlemen. Modi has been a lifelong hard political bargainer. Recall how he took charge of the BJP, wresting it away from Lal Krishna Advani, sidelining Sushma Swaraj and co-opting Arun Jaitley. The question is: Can Naidu and Nitish be as tough when they bargain?

There is a commonplace view within the commentariat that single-party majority governments are better than coalition ones. Facts support the opposite. In many ways, after the first post-Independence decade, the best period for the country in terms of economic development, poverty reduction, employment growth, global profile and domestic social stability was the quarter century from 1991 to 2014. It was a period in which three general, consensual and wise gentlemen became prime ministers of India — Rao, Vajpayee and Manmohan Singh — heading coalition governments. In Rao's case, the Congress itself functioned like a coalition. Vajpayee and Singh headed explicit coalitions. India and Indians did well through their terms

in office. There is no reason to believe that a coalition government headed by another genial gentleman like Kharge would not offer stability as well as sane and sensible policies.

Given Modi's personality, ideology and ambition, he will not leave any stone unturned in his quest for a third term. What kind of a PM he would be heading a coalition remains to be seen. How he behaves and performs will, however, depend on the wisdom and courage of his allies, his senior colleagues and the bureaucracy, which has often crawled when asked to bend. The Modi-Shah regime has weakened and suborned every institution of Indian democracy. Can Naidu and Nitish rein them in?

On his flight from Kanyakumari to New Delhi, Modi wrote an essay, making three key points. First, that henceforth India would only be Bharat. If it is to be made official, it would require a constitutional amendment that he may no longer be able to push through. Second, Modi outlined a new definition of the word 'reform' by suggesting that the country needs reform in 'every aspect of life'. Would a diminished Modi command the nation's regard to be able to provide leadership for that kind of reform? Third, Modi imitated Chinese President Xi by referring to the need for the country to have a 'New Dream'. A decade ago, Xi made much of his 'China Dream' — borrowing the older idea of the 'American Dream'. The American Dream and the China Dream were both about people 'living the good life'. Modi says the country should dream to be *Viksit Bharat*.

India will be *Viksit*, irrespective of who leads the Union Government next. So, even though Modi's dream of 400-plus in the Lok Sabha has not been realised, the nation's dream of becoming a developed country will be realised, over time. As for Modi and the BJP, their dreams have gone sour and disrupted by an electoral wake-up call.

THOUGHT FOR THE DAY

When the body of the people is possessed of the supreme power, it is called a democracy. — Montesquieu

From Uzbekistan with love

STANLEY CARVALHO

OF late, Indians have been travelling in droves to Uzbekistan, thanks to the proximity of this landlocked country, which is just a two-and-a-half-hour flight from New Delhi. What's more, food and accommodation are cheap there due to its weak currency, and the beautiful country has a rich history. To cap it all, the people are friendly. Uzbeks have special love for Indians.

At Khiva, a city on the old Silk Road, I was trying to take a photograph of a splendid minaret when two women approached me and said: 'Namaskar, India'. Then, they exclaimed: 'Mithun'. When I asked: 'Mithun Chakraborty?', they giggled and crooned: 'Jimmy, Jimmy, Jimmy, aaja aaja aaja...' — a song from his famous film *Disco Dancer*.

Without pausing for breath, they rattled off names of Bollywood stars — Amitabh Bachchan, Shah Rukh Khan, Aishwarya Rai Bachchan and Kareena Kapoor.

Even though part of our communication was lost in translation, I learned how much Uzbeks loved Indians and Bollywood. The women told me that Uzbeks watched a lot of Indian films and recalled how popular Mithun's films had been in the erstwhile Soviet Union. Impressed, I happily posed for a photograph with them before trotting off to find my companions.

At restaurants, parks, streets and malls, locals uninhibitedly began a conversation in fragmented English and asked for selfies. They thanked us with handshakes, hugs or flying kisses. It amused us that we had become celebrities of sorts in this former Soviet republic and felt honoured that Uzbeks expressed so much warmth and love for Indians.

At the crowded Chorsu Bazaar in Tashkent, some vendors, joining their palms, bellowed: 'Hello, dost, Namaste, India'. Others mentioned Taj Mahal, Raj Kapoor, Kajol, Preity Zinta, *Yeh hai Mumbai meri jaan...*

One evening, when we were dining in a restaurant that had once been a caravanserai, it wasn't surprising to hear a musician singing that classic Hindi film song: 'Mera joota hai Japani... Phir bhi dil hai Hindustani...'

A septuagenarian in our group, unfortunately, had a bad fall in a street and was rushed to hospital. She was screaming in pain. While the doctor was attending to her injured wrist, he started singing Hindi film songs. The heart-warming gesture diverted her attention from all the pain.

Last but not least, we saw a statue of former Prime Minister Lal Bahadur Shastri as well as a school and a street named after him in Tashkent, where he died in 1966, a day after signing the peace treaty that ended the India-Pakistan conflict.

Language can be a barrier to communication at times, but after visiting Uzbekistan, I realised that you don't really need language to communicate. A deep connection is enough to open doors to a conversation.

LETTERS TO THE EDITOR

Exit polls got it wrong

Much to everybody's surprise, the Opposition INDIA bloc, despite all the challenges it faced, managed to give a neck-and-neck fight to the BJP-led NDA across the country. The INDI alliance hobbled the NDA's march towards the goal of 400 seats. While it is true that the Opposition lacks a strong leader who can go toe to toe with PM Narendra Modi, the INDIA grouping managed to give the saffron party a tough contest. Notably, the actual election results are far different from what the exit polls had forecast. The results indicate growing discontent among voters with the ruling regime. The parties that would form the government at the Centre must ensure India's holistic development in the years to come through good governance and visionary leadership.

KIRTI WADHAWAN, KANPUR

Cong bucks poll predictions

With reference to the article 'Congress' failure to unite INDIA will cost it dear', the writer rushed to draw a conclusion based on what the exit polls projected. But contrary to the predictions, the grand old party has put up a strong show in the General Election, shattering the perception that the BJP is invincible. The BJP did not win the comfortable majority that it was expected to. The people of the country have sent out a strong message about how they feel about the current state of affairs. The BJP ultimately got the numbers to form the government, but dissatisfaction among voters is obvious.

PREM SINGH, CHANDIGARH

Setback for the BJP

The General Election results are a reminder that exit polls cannot be relied upon. No party, no matter how big, can take the voters or an election for granted. The election results are drastically different from what the pollsters had forecast. The saffron party has fallen short of its target. Though the BJP is not a party that easily makes compromises, it will now need its allies' support to sustain itself. It remains to be seen how it will affect the functioning of the new government.

ANTHONY HENRIQUES, MUMBAI

Lotus fails to bloom in Sikkim

Refer to the editorial 'Mixed bag for BJP'; Arunachal Pradesh CM Pema Khandu's victory has established him as a force to reckon with in the state. He has successfully filled the void left by the death of his father, Dorjee Khandu, in 2011. The results raise serious questions about the future of the Congress in the state that it once ruled. In Sikkim, thanks to CM Prem Singh Tamang's image as the Chief Minister of the common man and his pro-poor initiatives, his Sikkim Krantikari Morcha (SKM) bagged 31 out of 32 seats. The BJP, which parted ways with the SKM, must be sulking right now as it drew a blank in the state.

BAL GOVIND, NOIDA

Congress' diminishing appeal

Apropos of 'Mixed bag for BJP', the Assembly election results in Arunachal Pradesh reflect the Congress' diminishing appeal in a region where it was once a dominant force. Further, the saffron party's ability to retain power in Arunachal shows that anti-incumbency is not a prevalent sentiment in the border state. The BJP government in Arunachal and the SKM in Sikkim have their work cut out. In view of the ongoing unrest in Myanmar and China's knack for territorial disputes, ensuring stability in these regions should be the state governments' priority. Besides, the fragile ecological balance of the Himalayan states, which are prone to natural disasters like landslides and floods, is a concern that should be addressed as soon as possible.

MONA SINGH, BY MAIL

Convicted felon in the fray

Refer to the article 'Trump's conviction thickens the plot'; a convicted felon, Trump, if re-elected, would be bad news for American democracy. The former President has shown disregard for the law of the land. Despite being found guilty on as many as 34 counts of falsifying business records, he continues to describe the trial as a sham. He has openly cast aspersions on the justice delivery system in his country. The criminalisation of politics in the US is a matter of concern. Nobody breaking the law should be holding public office. It is a disgrace that he is the Republican Party's presumptive presidential candidate.

MD SHARMA, SHIMLA

UP shows the way for a resurgent Opposition



RADHIKA RAMASESHAN
SENIOR JOURNALIST

IN 2004, Uttar Pradesh scripted the downfall of the Atal Bihari Vajpayee government, flattening the trumpeted 'India Shining' slogan crafted by the BJP to reveal the underbelly in the quotidian lives of people coping with hunger and unemployment. Twenty years later, it fell on UP again to rewrite the denouement of a saga whose beginning and middle seemed predestined. Few were ready for the last chapter of the elections that changed course after Uttar Pradesh, Maharashtra and West Bengal threw up unexpected outcomes. Together, these states send 170 MPs to the 543-member Lok Sabha.

The Opposition is not about to displace the BJP-led NDA. Narendra Modi will be there as the PM for a third term. But he is likely to preside over a dispensation with a shrunken majority, which will subject him to the checks and balances that a diminished mandate carries, especially if he is held to account for his claim in Parliament of 370

seats for the BJP and 400 for the NDA.

UP has been the BJP's 'karmabhoomi' since 2014. The seeds of its revival were sown in a western town, Muzaffarnagar, in the sugar belt, populated dominantly by the Jats. Muzaffarnagar was scarred by a bloody bout of communal violence in 2013, the likes of which was seen in UP after years. The resulting Hindu-Muslim divide paid dividends to the BJP the state over, but its aftermath persisted in every election thereafter until 2022. Hindus and especially Jats smiled sweetly at visiting journalists, celebrated their 'bhaichara' (brotherhood) with Muslims in poetry, voted the BJP and retrospectively explained their decision as born out of insecurity for Hindus. Muslims were pragmatic and admitted that they had no hope either from politicians or civil society.

Yet, this year, Muzaffarnagar — of all places — turned its back on the BJP, voting out two-time BJP MP Sanjeev Kumar Balyan and voting in Harendra Singh Malik of the Samajwadi Party (SP), accused in these parts of 'appeasing' Muslims. So did Saharanpur, where the BJP had thrived on religious polarisation. It went to the SP's ally, the Congress. A change of heart? Fatigue with communal politics? Why did UP



COMEBACK: The Congress-Samajwadi Party combine upset the BJP appecart in UP. PTI

vote the way it did? Every issue, be it reservation, welfare politics or even a leader's charisma, has a shelf life. So too does the 'communal card' — it can't be overplayed. Muslims have not retaliated against provocations and incitements during the BJP rule. They have remained unprovoked by the BJP's incessant baiting and dares from the Yogi Adityanath government. If they don't react, what's in it for the Hindus to act? Issues of livelihood, especially for the young who used to get swayed by the Bajrang Dal school of proactivism but

The Opposition's ability to function as an effective counterpoint in Parliament and outside will depend on its cohesiveness and willingness to work on a common agenda.

bore the brunt of the economic paralysis following the Covid pandemic, preoccupied the voters.

UP's Opposition, led by the SP's Akhilesh Yadav and the Congress' Priyanka Gandhi Vadra, were reticent about Hindutva and the caste factor. Indeed, while choosing candidates, Akhilesh nominated only five Yadavs from his family lest he was accused of pandering to his caste. If caste figured in their discourse, it was contextualised in the threat to the Constitution and statutory reservation by the BJP which persuaded many Dalits to

abandon the BSP and vote for the SP.

Most of all, it was the subterranean tension between Adityanath and the BJP's central command that beset the UP BJP, fuelled by the speculation that his days as the CM were numbered and he would go the way of Shivraj Singh Chouhan and Vasundhara Raje because Modi allegedly perceived him as a threat to himself.

Will Adityanath become the first casualty of the BJP's reversals? A push-back is not easy because UP is not the only state that turned against the BJP. Would the CMs of Rajasthan and Maharashtra and the feisty Suwendu Adhikari of West Bengal be similarly penalised for the below-par showing in their states?

It is tantalising to speculate if Modi's writ would be allowed to prevail over such matters like before. Bitten more than once — and there are instances to demonstrate that the paterfamilias, the RSS, was overruled when tickets were distributed in these elections — the Sangh will see an opportunity to reassert itself, subtly or proactively, as KS Sudarshan, a former 'sarsanghchalak', did when Vajpayee was the PM.

Of immediate worry to a weaker BJP would be the equation between the Centre and the states

ruled by the party, which Modi recast in the Indira Gandhi template of dumping leaders at will and replacing them with rootless wonders.

The allies, who lay low for the past five years, might get a fresh lease of life, especially N Chandrababu Naidu — who steered Andhra Pradesh and the NDA to victory on his own steam — Nitish Kumar, whose Janata Dal (United) bagged more seats than the BJP in Bihar and even the breakaway Sena and NCP factions in Maharashtra which did the BJP's bidding in the elections and delivered a patchy performance.

The past five years also saw the denigration of institutions, examples of which are too many to be recounted. The Election Commission's conduct of the elections elicited scrutiny and disapprobation from the Opposition and watchdog groups. Yet, there was no accountability of the political executive.

A robust Opposition is just what is required to fill a much-needed vacuum. The INDIA bloc hangs together as a loose coalition which seems to have come into own now. Its ability to function as an effective counterpoint in Parliament and outside will depend on its cohesiveness and willingness to work on a common agenda. Is that too much of an expectation?

Inequality hindering India's march towards a developed nation



RANJIT SINGH GHUMAN
PROFESSOR OF EMINENCE,
GURU NANAK DEV UNIVERSITY

INDIA is certainly going to become the world's third largest economy in the near future, for which the substrate has been created since Independence. The Indian economy has been evolving and transitioning to higher levels of growth and development. The economy grew at an average annual rate of 0.8 to 1 per cent, while the per capita income's (PCI) growth rate ranged from 0.04 per cent to 0.2 per cent between 1900 and 1947. From such a dismal base, the economy transitioned to an annual average growth rate of 4.1 per cent during 1951-64, a great achievement by any stretch of imagination.

A significant departure from the earlier phase (1951-64) was achieved during the 1980s (a growth rate of 5.7 per cent per annum during 1980-89 and 5.2 per cent per annum during 1990-2002). Clearly, the planned development strategy laid down strong foundations and created a formidable substrate for future growth and development. Even the foundations of space and atomic technolo-

gy, about which the current political dispensation boasts so much, were laid down during the Nehruvian era. Nonetheless, ever since the NDA came to power in 2014, it has been mocking the previous governments (except the Vajpayee dispensation) and highlighting its own achievements. Such rhetoric often gives one the impression that it was only after 2014 that the Indian economy started developing. The post-Independence economic history of the country, however, does not support the claim.

Even the growth rate of the gross national income (GNI) and pre-capita income was higher during the 10 years of the UPA rule than in the decade of the NDA reign. The GNI (at 2011-12 prices) increased from Rs 50,43,422 crore in 2003-04 to Rs 96,79,027 crore in 2013-14 and further to Rs 1,54,61,721 crore in 2022-23, according to the Economic Survey 2022-23. The estimated projected GNI for 2023-24 comes out to be Rs 1,63,10,753 crore. Clearly, the GNI increased by 1.92 times in 2013-14 over 2003-04, whereas it rose by 1.69 times in 2023-24 compared to that in 2013-14. The real PCI surged from Rs 42,995 in 2003-04 to Rs 68,572 in 2013-14 (a 1.60-fold increase) and increased to Rs 99,774 (projected) in 2023-24, a 1.46-fold rise over that in 2013-14. In 2022-23, the PCI was Rs 96,522.

The trend growth rate of the



GAP: Unemployment and the quality of employment in the informal/unorganised sector are not being fully captured by the Periodical Labour Force Survey. REUTERS

GNI in the UPA years (2004-14) was 2.7 per cent per annum. It was estimated to be 1.9 per cent per annum during the 10 years of the NDA government. The respective growth rates of the PCI were 1.9 per cent and 1.3 per cent per annum. The trend growth rate is a better measure of comparison than the compound growth rate (CGR) and year-on-year (Y-o-Y) growth rate as it takes into account each year's value while the CGR is based only on the initial year's and end year's values and the Y-o-Y growth rate is only for the preceding and succeeding years.

It is crystal clear that at the macro level, the economy performed significantly better during the UPA's two terms than during the NDA rule,

Amid rising inequality, India's growth potential and prospects of becoming a developed economy are bound to be adversely impacted.

even if we take into consideration the economic slowdown during the Covid-19 pandemic. Even the share of development expenditure in the Union budgets of the UPA was slightly higher (47.88 per cent compared to that of the NDA — 47.21 per cent).

The economy got a shock due to the sudden and illogical decision of demonetisation in November 2016, which is visible from the slowdown during the succeeding years. The real growth rate of the GNI declined from 8.3 per cent in 2016-17 to 6.9 per cent in 2017-18 and further to 6.5 per cent in 2018-19, dwindling further to 3.9 per cent in 2019-20. The PCI growth rate dipped from 6.9 per cent in 2016-17 to 5.5 per cent in 2017-18 and further to 5.2 per

cent in 2018-19. It nose-dived to 2.3 per cent in 2019-20 (all post-demonetisation but pre-Covid 19 years). The ever-increasing NPAs of banks and their very low recovery (up to 20 per cent) through a one-time settlement during the NDA rule is also a serious drag on public money and development.

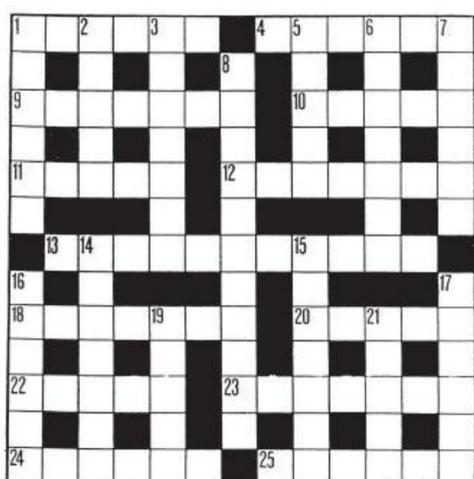
The unemployment rate of 6.1 per cent in 2017-18 was an all-time high in the previous 45 years, as per an NSSO survey. However, it recently registered a downward trend. The Periodical Labour Force Survey (PLFS) on employment and unemployment since 2018-19 is a poor substitute for the NSSO survey. What happened to unemployment and the quality of employment in the informal/unorganised sector is not being fully captured by the PLFS. The work participation rate — especially that of females — has also witnessed a significant decline in recent years. The ruling NDA's tendency of revealing less and concealing more — magnifying its own achievements and disparaging those of the earlier regimes — is also a new public discourse. Even the consumption data for 2017-18 was made public after great hue and cry by academia and civil society.

Private household savings are falling, and their debt burden is on the rise. In 2023, India was 111th out of 125 countries on the global hunger index, with its score of 28.7 indicating a serious hunger level. Paradoxically, it has

been dismissed as an erroneous measure of hunger by the Indian government. And how can appropriate socio-economic policies be formulated and implemented in the absence of vital statistics such as the Census? It all shows that the government is not keen on sharing data with the citizens. Though basic issues like unemployment, hunger and inflation have been raised by the INDIA bloc, the election results show a mixed response from the voters.

However, amid rising income and wealth inequality, the country's latent growth potential and its prospects of becoming a developed and rich economy by 2047 are bound to be adversely impacted. As per the World Bank classification, India is currently a lower-middle-income economy, and according to former RBI Governor Raghuram Rajan, it will continue to remain so even in 2047. With a PCI of 10,123 dollars (PPP terms), India currently stands at the 125th place. The GDP of the US and China is, respectively, 7.53 and 5.31 times higher than that of India. The PCI (PPP terms) of the US and China, respectively, is 8.43 and 2.47 times higher than that of India. In view of this, India's goal to be a developed and rich economy by 2047 seems like a distant dream. The new government at the Centre would have to address these challenges.

QUICK CROSSWORD



ACROSS

- Cooking instructions (6)
- Quick-witted (6)
- In a pitiful state (7)
- Wrong (5)
- Occur as result (5)
- All together (2,5)
- Have both good and bad effects (3,4,4)
- Liberate (3,4)
- Capital of Tibet (5)
- Enthusiastic (5)
- Boorish (7)
- In recent times (6)
- A steady succession (6)

Yesterday's solution

Across: 1 Flaming, 5 Bring, 8 Cut the mustard, 9 Throb, 10 Indulge, 11 Beauty, 12 Ascend, 15 Abiding, 17 Sit up, 19 An eye for an eye, 20 Tryst, 21 Dynasty.

Down: 1 Facet, 2 Alternatively, 3 Inhibit, 4 Gambit, 5 Based, 6 In all weathers, 7 Godsend, 11 Blatant, 13 Sustain, 14 Age-old, 16 Id est, 18 Piety.

DOWN

- Beam supporting a roof (6)
- Large army tactical unit (5)
- Byword (7)
- Kingdom (5)
- Deny (7)
- Ornamental tuft of threads (6)
- On earth (5,3,3)
- Extremely tense (7)
- Recklessly speculative (7)
- To an equal extent (2,4)
- Violent damaging action (6)
- Country (5)
- Severe (5)

SU DO KU

	1	3		4
4		8		
9			5	
5		2	6	8
4		3	7	2
	1		4	8
		9		1
2			1	6

V. HARD

YESTERDAY'S SOLUTION

6	7	1	9	4	8	2	3	5
9	2	4	7	3	5	1	8	6
8	3	5	2	6	1	9	4	7
2	5	7	1	9	3	8	6	4
1	8	9	4	7	6	5	2	3
4	6	3	5	8	2	7	9	1
5	1	6	8	2	4	3	7	9
7	4	2	3	1	9	6	5	8
3	9	8	6	5	7	4	1	2

CALENDAR

JUNE 5, 2024, WEDNESDAY

- Shaka Samvat 1946
- Jyeshtha Shaka 15
- Jyeshtha Parvishite 23
- Hijari 1445
- Krishna Paksha Tithi 14, up to 7.56 pm
- Sukarna Yoga up to 12.35 am
- Kritika Nakshatra up to 9.16 pm
- Moon in Taurus sign

FORECAST

CITY	WEDNESDAY		THURSDAY	
	MAX	MIN	MAX	MIN
Chandigarh	42	28		
New Delhi	43	31		
Amritsar	41	26		
Bathinda	43	26		
Jalandhar	40	27		
Ludhiana	41	27		
Bhivani	43	31		
Hisar	44	29		
Sirsa	44	31		
Dharamsala	34	20		
Manali	25	11		
Shimla	27	18		
Srinagar	27	16		
Jammu	41	25		
Kargil	29	11		
Leh	17	06		
Dehradun	35	26		
Mussoorie	25	18		

TEMPERATURE IN °C



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PAPER WITH PASSION

Nation wins

A smooth power transition demonstrates the strength of democratic values in the country, and people's will

The Lok Sabha elections 2024 have concluded, and all eyes are now on the formation of a new Government. It is often said that India is the world's largest democracy, and it is not a cliché. With a population exceeding 1.4 billion and an electorate of over 900 million, the nation's democratic processes are a colossal undertaking. But more significant are the democratic ideals that provide a rock-solid foundation for democracy. For over 75 years, we have not had a single instance when the transition of power was not smooth or when the parties fought after the announcement of results. Despite the immense diversity and complexity involved, India's democracy thrives, exemplifying how smooth elections facilitate the change of Government, ensuring that people's will prevails. It is made possible by several institutions and frameworks that provide India with a robust democratic setup. The Election Commission of India (ECI), for instance, plays a pivotal role in ensuring free and fair elections. Through meticulous



planning and the deployment of technology, the poll panel ensures transparency and efficiency, minimising electoral fraud and ensuring compliance with the model code of conduct. Though it is not above controversy by and large it does a decent job election after election.

Though the voter turnout this time was marginally lower than in the previous elections, the general level of voters' participation is high. Citizens from diverse backgrounds, including urban centres and remote villages, exercise their franchise with enthusiasm. This mass participation underscores the faith of Indian populace in the democratic process and their belief in the power of their vote to effect change. However, the biggest credit for the wellbeing of democracy in India must go to the political parties. Despite ideological differences, they have generally displayed a commendable level of maturity in accepting poll results. This acceptance is crucial for maintaining political stability and public trust. The peaceful transition of power, whether from one party to another or within a coalition, highlights the commitment of political institutions in upholding democratic values. If one institution stands out as the vanguard of the Constitution without bowing to the powers that be, it would be the Supreme Court of India. The Indian judiciary acts as a guardian of the Constitution, ensuring that electoral laws are adhered to and disputes resolved impartially. Landmark judgments and interventions by the Supreme Court have often strengthened electoral integrity and reinforced democratic norms. While India's democratic machinery functions effectively, it is not without challenges. Issues such as electoral violence, money power and misinformation campaigns occasionally taint the electoral process. India's democracy flourishes due to the strength of its institutions, the active participation of its citizens and the maturity of its political parties. It is both fragile and resilient, and its survival depends on our collective consciousness.

PICTALK



A man protects himself and his son from scorching heat at the Taj Mahal in Agra

PTI

Bengaluru becomes 'Garden City' again

Amidst rapid urbanisation and environmental challenges, the city is embracing green initiatives such as rooftop gardens and vertical farming

Bangalore, India, is rapidly developing its infrastructure with a focus on sustainability, innovation and environmentally friendly initiatives. As the city grows, it faces challenges such as urbanisation and environmental issues. To combat these problems, businesses are promoting initiatives like rooftop gardens and vertical farms. Once known as the Garden City of India, Bangalore is now reclaiming its legacy by promoting sustainable living practices and incorporating green spaces into its urban landscape.



city are now promoting rooftop gardening, turning barren rooftops into lush green havens. This initiative not only contributes to biodiversity but also serves as a recreational space for residents.

Vertical farming is another concept that fosters sustainability in Bangalore's urban spaces. This innovative practice involves growing crops in vertically stacked layers that maximise space utilisation and minimise water consumption. By bringing food production closer to urban centres, vertical farms help reduce carbon emissions and offer several benefits over conventional farming practices, such as higher crop yields, reduced water usage and year-round production.

Community gardens have also emerged as a vital initiative to bring communities together and grow their food. These gardens contribute to food security, promote healthy eating habits and strengthen social ties among residents. Additionally, they serve as an educational platform for sustainable agriculture practices and provide opportunities for residents to reconnect with nature. The government has constructed several laws and initiatives to support sustainable initiatives. The city has accepted green building certifications like LEED and GRIHA to combat environmental issues and ensure eco-friendly development that abides by environmental concerns while effectively meeting the

needs of investors. These initiatives improve locals' quality of life and aid in ecological preservation. The government has also released a toolkit and manual for the green index that will evaluate, analyse and rank environmental conservation initiatives of various infrastructure projects and programmes.

By rewarding rooftop garden development, supporting vertical farming efforts and allowing the formation of community gardens, the government is paving the way for a greener, more sustainable Bangalore. Collaboration among government agencies and the commercial and public sectors is essential for overcoming obstacles such as lack of knowledge, land availability and regulatory barriers. As Bangalore embraces sustainability and environmental management, the city is sowing the seeds for a greener, more liveable future.

(The writer is Co-Chair of CII NR Real Estate & CEO-Residential, Bhartiya Urban; views are personal)



ASHWINDER R SINGH

mark for Narendra Modi and it is his hitherto appreciated integrity, honesty and patriotism. The moment political turncoats like Satyapal Mallik were accommodated in the BJP and were offered important positions like the governorship of Kashmir, the BJP's fortunes took a beating for the worse.

Similarly, the alliance with the family-controlled JD(S) in Karnataka boomeranged on the BJP. Immediately after his election as the leader of the NDA following the 2014 impressive win, Modi had assured the constituents of his front that he would approach them with a progress card at the end of the five-year tenure. He was given all A+ by the electorate and also elevated the BJP with an absolute majority in the 2019 Lok Sabha polls, a rare feat in the last 35 years of India's electoral history. No party has got an absolute majority of its own since the 1984 election in which Rajiv Gandhi-led Congress scored more than 400 seats on its own. The 2019-2024 tenure of Modi as Prime Minister outperformed its track record by beating the COVID-19 pandemic and a synchronized attack by the Opposition parties and the

media. "A corruption free government" was what Modi gave the country during his two tenures. But the clueless manner in which they forged alliances with every Tom, Dick and Harry who sang paeans to Modi did the job that the Congress and other Opposition parties could not do for the last decade. Nobody would deny the fact that Modi delivered what he had promised. More than 11 crore toilets and nearly five crore robust houses for the poor coming under the benchmark of BPL, the Ayushman Bharat medical aid which has more than 50 crore beneficiaries, the Mudra Loan scheme for artisans and small and medium entrepreneurs had a direct bearing on common man's life.

What made the BJP align with RLD at this juncture remains a mystery. Equally strange is the BJP's decision to bring on board Ajit Pawar and Praful Patel, which the former had described as embodiments of corruption. The eagerness of a leader from Maharashtra to occupy the Prime Minister's chair is being seen as a faux pas by the BJP. The same leader had shocked the nation immediately after the last assembly election by swearing in as chief minister Ajit Pawar, only to submit his resignation in an ignominious manner.

Usually, politicians learn from past failures and correct themselves so that they do not fall into the same abyss again. What has happened is that the Prime Minister has lost whatever goodwill he had enjoyed with the electorate. Ram Temple alone would not satisfy the mind of the people. The voters had set a bench-

mark for Narendra Modi and it is his hitherto appreciated integrity, honesty and patriotism. The moment political turncoats like Satyapal Mallik were accommodated in the BJP and were offered important positions like the governorship of Kashmir, the BJP's fortunes took a beating for the worse.

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The Prime Minister said in his media interactions that six crore persons found employment in the organised sector which the Opposition belittled as 'Jumla'.

THE PRIME MINISTER SAID IN HIS MEDIA INTERACTIONS THAT SIX CRORE PERSONS FOUND EMPLOYMENT IN THE ORGANISED SECTOR WHICH THE OPPOSITION BELITTLED AS 'JUMLA'

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FIRST COLUMN

GOOD LEADERSHIP PREVENTS BURNOUTS

Leadership stems from actions and integrity, not mere titles



SAKSHI SETHI

A true leader has the confidence to stand alone, the courage to make tough decisions and the compassion to listen to the needs of others. He does not set out to be a leader but becomes one by the equality of his actions and the integrity of his intent. “?

Leadership is a key controllable factor that humans can learn and implement in their organizations. It is something that is not defined by position and has a large impact on the productivity of an organization. A leader in an organization must balance various roles, from visionary to manager, mentor and even change agent as people in general are diverse and have distinct components that make them unique and set them apart from the next person. The ability to wear these multiple hats distinguishes great leaders from merely competent ones the ones possessing the necessary skills and knowledge.

‘Organizational leadership’ the term often talked about is a multifaceted and dynamic endeavour that requires a blend of vision, integrity, empathy, decisiveness, resilience, effective communication, accountability and adaptability. The impact of strong leadership extends beyond the confines of management, influencing the very fabric of the organization. Leadership is a strength that inspires and guides the cooperation and attitudes of others on the way to set vision. Effective leaders understand that a well-defined vision aligns teams, fosters a sense of belonging and motivates individuals to contribute their best. They are aware that they must take into consideration the responsibilities of all the decisions they believe are necessary to provide strong bonds and foster competent collaboration between members of their organization. They influence the



followers in such a way that they put more effort into the accomplishment of organizational goals and objectives.

At its core, organizational leadership is about steering the organization towards its vision while managing its resources effectively. It encompasses the ability to make strategic decisions, motivate its employees and create an environment conducive to growth and development.

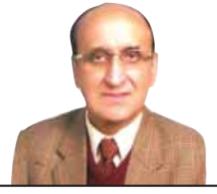
Burnout, which is often characterized by chronic stress, exhaustion and a sense of ineffectiveness, is a pervasive problem that can significantly impact both individuals and organizations. Effective leadership can be a key factor in preventing burnout and promoting a healthy, productive workplace for it influences every aspect of the organization, from employee morale and productivity to innovation and financial performance. A leader in an organization should embody various qualities and exhibit behaviours that inspire, motivate and guide their team towards achieving common goals.

By embodying attributes such as cultivating a positive and inclusive work culture where everyone feels valued and respected; delegating tasks and trusting team members with responsibilities; establishing and communicating clear, achievable goals; inspiring and motivating the team by setting a positive example, providing encouragement and recognizing achievements can a leader effectively guide their organization towards success and foster a supportive, productive and positive work environment.

There is no denying the fact that organizational leadership has a profound impact on workplace burnout but, leaders who prioritize employee well-being, foster a supportive work environment and implement strategies to manage stress can significantly reduce the incidence of burnout. By understanding the factors that contribute to burnout and adopting a proactive, empathetic approach, leaders can enhance employee satisfaction, productivity and overall organizational health. The relationship between leadership and burnout is complex, but with the right practices and mindset, leaders can steer their organizations towards a healthier and more sustainable future.

(The writer is an educator; views are personal)

BJP moves mountains to win Mandi seat



K S TOMAR

The BJP is determined to regain the prestigious Mandi seat in Himachal Pradesh. The contest has become a battle royal between former royalty and a film star



Sunny Deol could not uproot any ‘hand-pumps’ in the domain of politics but it could not desist the ‘Jhansi Ki Rani’ Kangana Ranaut to jump into the electoral fray from her hometown Mandi, in Himachal Pradesh. It is a prestigious seat for the BJP high command which gave a ticket to a ‘parachute’ by ignoring the genuine claim of the senior leaders hence Prime Minister, Narendra Modi addressed a huge rally at Mandi town on May 24. PM established a new relationship with being elder brother of Kangna which may benefit her as it sends a signal of her closeness to Modi. She is a die-hard devotee (Bhakt) of Modi and felt extremely elevated when the PM described her as Behan (sister) which may send a clear signal of her closeness and create positive vibes amongst the electorate.

Many of the box-office hits have bombed in the political arena of north India except the ‘dream girl’ Hema Malini, who is still going strong as a ‘jat bahu’ from Mathura in western Uttar Pradesh and late Vinod Khanna, who seamlessly turned into astute politicians after being a ‘heartthrob’ in the 1980s. Northern political winds in India blow in different patterns and that is why superstars like Amitabh Bachchan could not handle the gruel of politics while his ‘sharabi’ heroine Jaya Prada needed the umbrella of a mentor like Amar Singh always by her side, till he breathed last.

Back to a ‘novice politician’ Kangana. She is being haunted during the election campaign owing to two pejorative issues. First, Kangana’s absence during the catastrophe in July/August last year has become handy for Congress which is exploiting it to the hilt. All 17 assembly segments of the Mandi Lok Sabha seat were hit due



DESPITE THE ODDS, KANGANA IS FULLY PINNING HER HOPE ON THE HIGH POPULARITY AND CHARISMA OF PRIME MINISTER NARENDRA MODI. BJP HAD WON ALL FOUR LOK SABHA SEATS IN HIMACHAL IN 2019 AND POLLED OVER 69.11 PER CENT VOTES

to natural disaster but she remained confined to her abode in Mumbai. The political opponents are accusing her of being an absentee resident of Mandi and affected people will have to hanker in the business capital, Mumbai for the redressal of grievances if she wins.

The second, the Bollywood actress took to Twitter and shared a video of the Dalai Lama with his tongue out, standing next to US President, Joe Biden and the caption read “The Dalai Lama receives a warm welcome at White House” She had to apologise later and clarified that she did not mean to hurt feelings of anyone. But followers of the spiritual leader have not pardoned her hence Buddhists recently organised a demonstration at Kaza, a part of Lahaul Spiti which falls in the Mandi constituency and showed black flags and placards “Go Back” which was condemned by BJP state leaders. The parliamentary election of the Mandi constituency has become a lively affair this time as film star Kangana is pitted against Public Works Minister, Vikramaditya Singh, the son of six-time chief minister, late Virbhadra Singh. Kangana is a native of a small village in the Mandi district and her phenomenal rise as a little girl from the non-descriptive village of Bhambala in the Mandi district in Himachal Pradesh, can be attributed to her sheer determination, commitment and willpower. She is trying to create an emotional connection with voters thereby cit-

ing her struggle and subsequent achievements in the film world. The crowds are thronging to her rallies but it is extremely difficult to predict whether she will be benefited when they go to polling booths on June 1.

Despite the odds, Kangana is fully pinning her hope on the high popularity and ‘charisma’ of Prime Minister Narendra Modi. BJP had won all four Lok Sabha seats in Himachal in 2019 and polled over 69.11 per cent votes. BJP nominee established lead in all 17 segments of the Mandi constituency hence it is a big challenge to retain it, especially in the face of local issues of unemployment, price rise, state’s economic crisis etc.

BJP’s vote share had dwindled during state assembly elections in 2022 which came down to 43 per cent, a drop of 16.11% when compared with previous parliamentary polls. Touring all the seventeen assembly segments in the Mandi parliamentary constituency has posed a huge challenge for Kangana as she is unaware of the topography, especially the far-flung tribal areas of Bharmour, Lahaul & Spiti and Kinnaur. Experts say that the film actor is facing a horde of challenges in her current role which cannot be synonymous with fairy tales or films. On a mandatory basis, the voters would expect her to be a full-time politician and make Mandi parliamentary constituency; she is promising to make Mandi her permanent abode for an easy

approach to getting their work done. Kangana also has the luxury of the support of disciplined BJP party cadres, vast resources and the well-oiled machinery of RSS in her groundwork.

Congress nominee, Vikramaditya enjoys the inherent advantages of having acquaintances with the voters which have become meaningful as his family has represented Mandi seat six times and his mother Pratibha Singh, the state party chief is sitting MP. Vikramaditya is focussing on local issues including the centre’s failure to announce a special package to help victims of last year’s catastrophe and the inaccessibility of Kangana.

In the final assessment, Hindutva rhetoric may have an impact though the rival candidate has strong Hindu credentials, He had attended the Ram Temple Pratishthan ceremony despite the Congress high command’s directive to keep away. Modi’s personal appeal and governance record could disrupt conventional political dynamics.

Ultimately, Kangana’s success hinges on her ability to navigate these challenges while leveraging BJP’s organizational strength and Modi’s popularity coupled with his ten-year association with Himachal as BJP in-charge from 1990 to 2001 may give a special twist to the political scenario in any seat in this hilly state.

(The writer is a political analyst and senior journalist based in Shimla, views are personal)

Rajasthan village girls struggle for sports opportunities

Girls in rural India face challenges accessing sports and education due to limited spaces, family restrictions and gender disparity

In our village, there is no field for girls to play on. The entire village has only one school with a usable field, but it’s dominated by boys, forcing us to practice in a corner, said 16-year-old Sonu from Ghadsisar village in Churu district in Rajasthan, who practices kho-kho daily with her teammates in a corner of the village’s only high school ground.

17-year-old Aarti, who practices kho-kho with Sonu, said, “Our team has only traveled once to Sardarshahar tehsil and once to Foga village to participate in the game. After that, we haven’t gone anywhere. We don’t get the chance because our performance isn’t good enough. How can we per-



MEERA NAYAK

form well without proper practice opportunities? Having a field for practice is essential, but we don’t have one.” Girls do not receive support from their families to go outside the village to practice. Ghadsisar village, located about 254 km from Jaipur in Churu district, has a population of around 3,900. Within this small population, there is a significant

disparity in literacy rates between men (62.73%) and women (38.8%). This reflects the discrimination that girls face in terms of education. Within this smaller group, girls who are challenging the social norms, are further discriminated against due to a lack of a dedicated sports field for girls. Consequently, their practice sessions are disrupted, negatively affecting their performance.

“This village has about 800 houses. The girls who study at the village school still get practice opportunities during school days, but where should the girls who no longer study here go for practice?” said Kanta, another young girl from the village. “The boys can play



anywhere or in fields in other villages, but our families don’t allow us to go far from home for practice. Therefore, our village needs a dedicated field for girls to play,” she added. With years of negotiations, they did manage a corner space in the field but even that becomes unavailable during vacations. “The boys

often climb over the school wall to play on the field, but we girls can’t do that,” informed Kanta. Regarding this issue, the village sarpanch, Manoj Kumar, acknowledged that there is no separate field for girls in the village, which causes difficulties for them in practice. He mentioned that the gram panchayat had

submitted a proposal to the tehsil headquarters, but the tehsil authorities indicated that while there is vacant land in Ghadsisar, it belongs to the johad paytan (water reservoir) and the mining department. Allocating this land for a sports field is beyond the tehsil’s jurisdiction.

Understanding the situation, the panchayat selected a different site and submitted a new proposal to the tehsil. However, due to the code of conduct imposed for the Lok Sabha elections, no action has been taken. The panchayat will make another attempt after the election process is completed to ensure a sports field is available for the girls. Social worker Heera Sharma

emphasized the importance of sports for all children, stating, “Whether it’s a boy or a girl, playing sports is crucial for physical and mental development. It not only keeps the body healthy but also enhances mental well-being. Denying girls the opportunity to play would be unjust. Playing sports boosts girls’ confidence, allowing them to run freely on the field and contributing significantly to their physical development.” She added, “Sports are excellent for fitness and can also provide a career path, with athletes bringing honor to the country. This is why the government is promoting sports and athletes through initiatives like ‘Khelo India.’ Many girls from rural areas

have emerged to represent India at district, state, Olympic and Commonwealth games, winning medals for the country.” This year, at the sixth Khelo India Youth Games held in Tamil Nadu, athletes from Rajasthan delivered outstanding performances across various events, earning the state a place in the top 5. Both girls and boys excelled. Yet despite these successes, many rural areas in the country continue to deprive girls of the chance to participate in sports, even though access to sports fields is essential for all adolescents, regardless of gender.

(The writer is a grassroots writer from Lunkaransar, Rajasthan; views are personal. Charkha Features)

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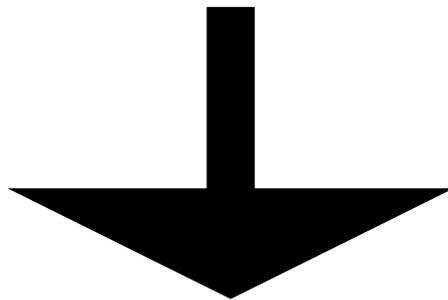
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