

## 2024 is an open race. But the question is what can change the game before election.

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We have the first confirmation of what was widely accepted after the Karnataka election: 2024 is now an open race. The ruling BJP's return to power is no longer a foregone conclusion. This is good news for anyone who believes in the values of the Indian republic. At the same time, this is not going to be an easy battle. Those who strive to reclaim the republic must get their act together.

The basic equation for 2024 is not hard to spell out. BJP's SWOT analysis is all around Narendra Modi. Strength: Modi's charisma. Weakness: Modi government's performance. Opportunity: some last-minute trick up Modi's sleeve. Threat: sudden meltdown of Modi's image. The opposition's strength lies in India's geography and sociology, though its weakness is history and psychology. While economics presents an opportunity for the opposition, its biggest threat comes from politics.

The latest nationwide opinion poll carried out by the Lokniti team at the Centre for the Study of Developing Studies (CSDS) helps us fill and fine-tune this broad outline. Its findings were first aired in two parts on NDTV and then presented in two articles in The Print. Lokniti surveys continue to be my favourite barometer of public opinion, and not just because of my past affiliation. Although its sample of 7,202 is too small to permit a state-wise projection of votes and seats (something it wisely stays away from), its strict adherence to stratified random sampling from electoral rolls gives the confidence that it accurately captures the voice of the Indian voters. Besides, Lokniti uses standardised question wording that allows comparison across time. Above all, it meets high standards of transparency in sharing its methodology and making all its past findings public.

The top-line and the most startling finding of this survey is a 10 percentage-point increase in the nationwide vote share of the Congress. As per this survey, if elections were held in the last week of April 2023, Congress would have secured 29 per cent votes, up from 19.5 per cent that it secured in 2019. That is a staggering swing of votes (a gain of nearly 7 crore votes), enough to place the Congress where it used to be prior to its dramatic slide in 2014. The catch is that there is no corresponding swing against the BJP. If anything, this survey estimates BJP vote share to go up from 37.4 per cent in 2019 to about 39 per cent now.

Lokniti team explains that this gain for the Congress is at the expense of "others", mainly regional political parties. They have not released any regional or social break-up of vote share. One can only speculate that this jump in Congress' votes would have come from Congress allies (NCP or JDU and RJD) or potential allies (SP, YSRC or TMC) or those who have played neutral (BJD, TRS, AAP). That is not very helpful and could increase friction with potential allies. In social terms, this increase is likely to have come from Muslims, other marginal social groups and the poor.

We must hold our horses about what it would mean in terms of seats. The survey does not give vote share for NDA and UPA (or Congress+) as it stands today. There is no doubt that the coalition picture would be much less flattering to the ruling party, given the meltdown of the NDA. It is also possible that the small accretion to BJP's vote share may have come from the party poaching into the vote share of its erstwhile allies. Overall, these figures may not translate into dramatic increase in Congress' tally, but enough to push the BJP down to the brink of majority.

So, at this stage everyone has good reasons to be nervous. BJP should be nervous about the sharp increase in the Congress vote share. Congress should be nervous because the BJP is not shedding votes. Regional parties should be nervous that both the national parties may be gaining at their expense. This nervous energy — creative as well as destructive — is going to drive us to the 2024 Lok Sabha election.

### **Road to 2024 goes via politics**

This survey gives us clues about what may and may not work. As we all know, besides its structural advantage of money-power, media control and organisational machine, the BJP's real strength is PM Modi's carefully cultivated and propagated image. The survey confirms that he continues to be popular, way ahead of any competitor. Though there is a sharp increase in Rahul Gandhi's popularity and acceptance, post Bharat Jodo Yatra, he is yet to close the gap with the front-runner. The Prime Minister's publicity gimmicks at the international stage, obediently amplified by the Indian media, have indeed helped him cultivate an image of a leader of international stature, someone who has enhanced India's global standing. An average Indian loves this.

The BJP's biggest weakness also stems from Narendra Modi, whom economist Parakala Prabhakar has aptly described as "staggeringly incompetent". It is getting harder to keep from the public some of the consequences of the PM's misgovernance, especially in the domain of economy. Besides, the Modi-Shah approach of eating up or dumping allies has meant that the BJP does not have substantial allies. The JD(U) and the Akali Dal have left the NDA and the Shinde faction of the Shiv Sena does not command even half of the popularity of Uddhav Thackeray's Shiv Sena, according to a survey conducted by Marathi daily Sakal. So, the burden of winning 273 seats now lies only on the BJP. And that is not going to be easy.

Given its dependence on Narendra Modi, the BJP is vulnerable to a sudden meltdown in his carefully crafted image. The survey does not say anything — hopefully not because it is a taboo — about the impact of the allegations regarding the Modi-Adani nexus. However, the fact remains that this allegation is far more serious and potentially more damaging than Rafale. If the opposition can pursue the Modi-Adani campaign relentlessly, then this issue could play a decisive role in 2024.

For the opposition, the real strength lies in its geographical spread. Different opposition parties take on the BJP in different states. Most of them draw support from castes or classes at the base of the social and economic pyramid. The opposition's weakness is its inability to forge a clear message, or to have a credible messenger. More than a pre-electoral unity, the opposition needs political coherence and a unified narrative. A weakness on that score helps the BJP sustain its propaganda. As for the messenger, the survey establishes Rahul Gandhi as the principal challenger to Narendra Modi, way ahead of other opposition contenders for PM. His popularity rating is twice as high as it was in 2014, yet not at the level for him to enter the ring for the knockout duel.

Operationally, the most salient indicator of this survey for the opposition is the need to focus on the economic woes of the people. The pain points are quite clear and more pressing than ever: unemployment, poverty, and price rise. In this survey, people say their economic condition has worsened in the last four years. And they are unhappy with the performance of the Modi government on the economic front. The real challenge for the opposition, specifically for the Congress, is to come up with a set of credible policy proposals on the economic front that appeal to the base of the pyramid.

In a way, we are back in 2018, the year before the last parliamentary elections. Economic downturn had led to popular discontent and the Modi government's popularity had dipped steadily. This was followed by the BJP's defeat in Madhya Pradesh, Rajasthan, and Chhattisgarh. There was widespread anticipation of a loss of around 100 Lok Sabha seats for the BJP. But then came Pulwama-Balakot that upset every known calculus. Many of the figures in the recent survey are very close to what the CSDS had recorded in its nation wide polls in 2018. The additional factor this time is the Bharat Jodo Yatra and the positive energy in the opposition camp.

Will this simmering discontent be converted into a decisive anti-incumbent vote? Or will we see a twist in the tale, just as in 2019? The question everyone asks, privately, is: what is the incident that will fuel the emotional surge across India just before elections? Also, let us not forget the question Pratap Bhanu Mehta has raised recently: can the BJP afford to lose and give up power in a democratic election?