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**Asia in 2025:
Great power rivalry, contested politics,
and global disorder**

viella



CENTRO STUDI PER I POPOLI EXTRA-EUROPEI “CESARE BONACOSSA” - UNIVERSITÀ DI PAVIA

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INDIA 2025: ECONOMIC PARADOXES, POLITICAL RECOVERY, AND THE BATTLE FOR ELECTORAL INTEGRITY

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This article analyses political and economic developments in India during 2025. The year witnessed the BJP's political consolidation following the 2024 setbacks, cemented by decisive victories in the Delhi and Bihar state elections. The government projected stability by managing security crises with strategic dexterity. Economically, while headline GDP growth remained robust, the outlook was complicated by a trade war with the US and concerns over data integrity raised by the IMF. Crucially, the legitimacy of the electoral process became a central conflict; while the opposition's «Vote Chori» campaign failed to prove rigging, the Election Commission's controversial management of voter rolls deepened the erosion of democratic trust.

KEYWORDS – Indian domestic policy; electoral integrity; state elections; Indian economy; democracy.

1. Introduction

The year 2025 was eventful in India. The most tragic event certainly was the brutal killing of 28 people in Pahalgam, in Jammu and Kashmir on 22 April 2025 by a terrorist commando, almost certainly coming from Pakistan. What upset the most India's (and the world's) public opinion was that the terrorists asked the religion of the people they had in front and decided to spare the lives of women, children and Muslims, while killing in cold blood everyone else. The Indian government's reaction was to immediately point the finger towards Pakistan, accusing the government of complicity (even though evidence has not been revealed). India then reacted militarily, which caused a four-day war with Pakistan, after which a ceasefire was reached – and held for the remaining of the year. The impact of the Pahalgam strike and its consequences are analysed in-depth in this issue of *Asia Maior* [Hall 2026].

Delhi was also stricken by another terrorist strike on 10 November, when a car exploded near the Red Fort in the capital. The damage was relatively limited – 15 people died and more than 20 were injured – considering that the area was extremely busy at the time of the blast. What was particularly interesting was the reaction of the Indian government, which was completely different from the one it had had in April. First, the gov-

ernment did not accuse Pakistan or anyone else, and it exercised caution and restraint. The authorities focused their investigation on a network of Indian Muslim men, with connections to a medical college at the outskirts of Delhi. Very little has emerged on the case, which was quickly superseded by the media cycle. To date, 7 people have been arrested, but a clear outline of what exactly happened and why has not emerged yet.

What is important about the Delhi blast is that it directly contradicted a fear that emerged after the Pahalgram attack, namely that New Delhi, by announcing and implementing a new anti-terrorism doctrine according to which each attack will be followed by military action, had put itself in the corner as public opinion would have expected India to launch strikes after any major attack. However, the different reaction to the two attacks – military action after Pahalgram, police investigation after the Delhi blast – demonstrated that the government was able to control the narrative and to decide when and how to react, even without providing any substantial evidence of external complicity (as in the case of the Pahalgram attack). Politically, both episodes showed the Modi government to be firmly in control of the situation and comfortably able to absorb and manage shocks. In other words, during 2025, the BJP-led government seemed to have recovered from the 2024 electoral verdict – when it had lost its absolute majority – and found a way back in control of the political scene.

This was also evident from the results of two important state elections, for the territory of Delhi (February) and Bihar (November). The BJP dislodged the Aam Aadmi Party (AAP) in the capital and retained control of Bihar, actually increasing its seat share to become the state's largest party. The electoral results are examined in section 4.

Additionally, the BJP survived without damage a sustained attack by opposition parties, in particular the Congress. Its leader, Rahul Gandhi, in a series of press conferences, presented «evidence» (not very convincing, as we shall see in section 3) that the government was involved in a conspiracy to destroy India's democracy by rigging the elections. While Gandhi did show that India's electoral procedures need serious reform to ensure electoral integrity, he failed to provide a «smoking gun» and, more importantly from his point of view, to convince voters that his party was the last obstacle standing between the government and the complete destruction of the democratic system.

Stability was also evident in India's economic outlook, which presented a somewhat usual combination of strong economic growth coupled with worrying signals of distress. These dynamics are analyzed in section 2, along with the internal repercussion of Donald Trump's trade war with India and structural reforms adopted by the government, at least partly to offset the negative consequences of trade uncertainties.

2. *The economic outlook*

In 2025, the Indian economy presented what has become a familiar look. On the one hand, GDP growth remained very robust, outpacing virtually all large economies in the world. On the other hand, however, beneath the surface, several signs signal that India's economic outlook is vulnerable.

The GDP growth for the first two quarters of the fiscal year 2025/26 (April-June and July-September 2025) surprised analysts by clocking in at 7.8% and 8.2%, rising to its highest rate over the previous six quarters [Ohri and Kumar 2026, 28 November]. The data surpassed predictions of most analysts (including the Reserve Bank of India, RBI), which had forecasted a slowing down of the economy in the wake of the imposition of high tariffs on Indian goods by the US administration [Hall 2026]. However, the Indian economy, driven by robust consumer spending, performed better than expected. Additionally, the RBI signalled confidence in price stability, lowering its inflation forecast for FY26 to 2% [TOI *Business Desk* 2025, 5 December].

In other words, these data suggest that India in 2025 found itself in a sweet spot: robust growth is accompanied by price stability and low external deficit. As suggested by former RBI governor Duvvuri Subbarao, the present situation – different from past cycles of high growth-high inflation followed by phases of slower growth and lower prices – might be due to better accounting mechanisms adopted over the last decade, more predictable and transparent monetary policy and a credible medium-term fiscal consolidation path, along with structural reforms such as the introduction of the Goods and Services Act in 2017 or the new Bankruptcy Code of 2016. However, Subbarao himself points at some fragilities, from the persistence of the decades-long inability of the Indian economy to generate enough jobs, the persistence of low private investments, low capital inflows and the fact that inflation might be under control largely due to favourable external conditions (volatile by definition) [Subbarao 2026, 5 January].

There are, however, other signs that the economy might not be performing as good as headline numbers suggest. First, the glowing narrative of being the «world's fastest-growing large economy» faced significant credibility challenges regarding the data themselves. In November 2025, the International Monetary Fund (IMF) downgraded India's national accounts statistics – specifically the GDP and gross value-added series – to a «C» grade, the second-lowest on its scale. The IMF highlighted methodological weaknesses that «hamper surveillance», specifically pointing to the outdated base year of 2011-12 and the continued reliance on wholesale price indices for deflators in the absence of producer price indices [Raghavan 2025, 27 November]. In fact, recent GDP growth figures have been disputed pre-

cisely on the deflator used, which many analysts believe was artificially low [Upasani 2025, 2 September].

It should be noted that this is not the first time that India's GDP figures have been questioned. In 2019, former Chief Economic Advisor of India, Arvind Subramanian, argued that growth figures between 2011/12 and 2016/17 had been inflated by about 2 percentage points per year, due to changes in the methodology used to calculate the GDP [Subramanian 2019]. In early 2026, following the release of the new GDP series with 2023/24 as the base year, Subramanian and his coauthors updated their estimates and argued that India's GDP overestimation persists. This means, according to the authors, that India's macroeconomic data have been overtly optimistic data for two full decades [Anand, Felman and Subramanian 2026].

In short, while clearly the Indian economy is growing fast, knowing precisely how fast remains elusive, with the available data. Certainly, other indicators are in contrast with the image of a booming economy. For instance, corporate revenues decelerated sharply over the last year; the brain drain has accelerated over the last decade, with more than 675,000 Indians migrating annually, a figure which almost twice as large as in the 2010s; employment growth remains very weak; Foreign Direct Investments have collapsed to 0.1% of the GDP and the stock market has performed poorly (and witnessed a record net capital outflows of nearly US\$ 19 billion) [Sharma 2024, 11 January]. Furthermore, the Indian rupee depreciated by 5% during 2025, reaching an all-time low of 90 rupees for 1 US\$.

2.1. *The tariff war*

The trade relationship with India's largest partner, the United States, deteriorated significantly during 2025. By August 2025, the US administration had imposed tariffs as high as 50% on Indian goods, officially penalising New Delhi for its continued purchase of Russian oil and its perceived alignment with the BRICS bloc. Since, as repeatedly pointed out by the Minister of Foreign Affairs, S. Jaishankar, the imposition of tariffs on India appeared not justifiable and discriminatory, there have been speculation about the real reason for the punitive measure, attributing them to geopolitical calculations [Yang 2025, 12 August] or India's denial of Trump's role in brokering a ceasefire between India and Pakistan in May 2025 [Jacob 2025, 14 August].

These tariffs, among the highest in the world, targeted critical sectors including steel and aluminium, where duties were doubled to 50%. The impact was immediate and severe. US goods imports from India fell by nearly 20% in April alone, amidst confusion over the new rates. However, by the end of the year, Indian exports to the US seemed to have had no effect at all. In fact, according to data released by the Ministry of Commerce in November, exports grew by almost 20% year-on-year, driven particularly by strong exports towards the US (+22% year-on-year) [Siddiqui 2025, 17 December].

Of course, it might be that the new tariffs will take a certain amount of time to be reflected in trade figures, but for the time being, the effect has been virtually null.

However, high tariffs were not the only measure taken by the US administration against India. In September, President Trump introduced a steep US\$ 100,000 fee for requesting a H-1B visa to work in the US, a move widely interpreted as a blow to India's IT Industry. In fact, over 70% of H-1B visa holders are Indian citizens [*The Economic Times* 2025, 20 September]. However, the move could potentially have positive repercussions for India, as it should act as a partial restraint for mass migration of skilled people to the US – a brain drain which accelerated massively over the last decade. It is likely that US firms will be willing to pay the fee for recruiting top talent from India, but the fee will act as a disincentive for attracting a wide range of professionals (including in the academic sector), who might then decide to remain in India (or go somewhere else).

The government unintentionally responded to these external pressures in the Union Budget presented on February 1, 2025, a few months before the US punitive measures were announced. Prime Minister Narendra Modi characterised it as the «most middle-class friendly budget in India's history», a clear signal of the government's intent to shore up its core political constituency amidst slowing consumption [Palit 2025, 4 February]. Of course, it is somewhat improper to talk about a «middle class» in the Indian context, as what is generally meant by this term (at least in the context of the Budget) is those who pay income tax, who belong to the top 10% of the income scale.

The central pillar of the budget was a significant overhaul of the personal income tax regime. The exemption limit was raised substantially, ensuring that annual incomes up to ₹1.2 million would no longer be taxed, a 70% increase from the previous threshold of ₹700,000. The objective was clearly to boost demand and consumption, with an eye to the Delhi elections, which were to begin just a few days after the presentation of the Budget. Delhi is arguably the most «middle class» state in the whole country. Despite this populist tax cut, which entailed foregone revenue of approximately ₹1 trillion, the government adhered to fiscal prudence, maintaining the fiscal deficit target of 4.9% for FY25 and projecting a consolidation to 4.4% for FY26 [Rai 2025, 4 February].

2.2. *Reforming taxation and labour*

2025 was also marked by two important structural reforms, which aimed at boosting internal demand and promoting investments, particularly in manufacturing. The first of these reforms – a comprehensive overhaul of the Goods and Services Tax framework – was announced in August 2025, with a clear intention to stimulate economic growth via internal demand, in the wake of high tariffs imposed by the US administration.

The reform compressed the previous multi-tier rate structure into three primary slabs: a 5% «Merit Rate» for essentials, an 18% «Standard Rate» for most goods, including consumer durables and automobiles, and a 40% «Special Rate» for «sin» goods and luxury items. The reform reduced tax rates on 357 items, moving daily-use products like food items and personal care goods into the lowest 5% slab. Even luxury items such as mid-sized SUVs saw an effective tax reduction, moving from a complex structure of about 45-50% (including cess) to a flat 40% [Rai 2025, 12 September].

The immediate political and economic goal was to engineer a «savings festival»²⁴. Government officials and early industry data suggested success, reporting record-breaking sales during the Navratri festive season, with some retailers claiming growth between 25% to 100%. However, a closer examination reveals a more nuanced reality. Facing uncertain demand, many dealers and manufacturers absorbed the GST cuts by removing previously available «dealer discounts» of 10-15%²⁶. Consequently, while the tax component fell, the final price paid by the consumer often remained unchanged, suggesting that the «consumption boom» touted by the state may have been partly optical or driven by supply-side adjustments rather than reform-induced demand growth [Kotasthane 2025, 8 October]. Overall, it is probably good news that the GST reform did not have an immediately visible effect, as it signals that internal demand remains robust.

While the GST reforms focused on consumption, the government also sought to reform the supply-side by implementing the four Labour Codes in late 2025. These codes – on Wages, Industrial Relations, Social Security, and Occupational Safety – subsumed 29 existing, often archaic, labour laws into a simplified framework effective from November 21, 2025. The reformed codes were originally announced in 2019 and 2020 but left unimplemented. The announcement to take the reform ahead represents a response to a decades-old demand by business groups and international institutions, which had argued, somewhat without providing very convincing evidence, that the restrictive labour laws were responsible for the limited role of the manufacturing sector in the Indian economy.

This reform represents a shift in the political economy of Indian labour. By merging laws and simplifying compliance, the state aims to reduce the «regulatory cholesterol» that has historically incentivised informal hiring [Palit 2025, 26 November]. Politically, the implementation signals a decline in the influence of trade unions, which have historically resisted such consolidation.

However, the reforms also attempt to modernise social security by extending protections to the «new» sectors of the economy. For the first time, gig workers and platform workers – groups largely outside the ambit of traditional unions – are promised legal recognition and some degree of social security benefits.

Being labour a concurrent subject under the Constitution of India, much will depend on how the codes will be implemented. Some BJP-ruled states had started drafting rules even before the formal announcement, while opposition-ruled states like West Bengal, Punjab, Kerala and Karnataka might drag their feet.

In summary, the Indian economy in 2025 exhibited strong headline growth figures, aided by fiscal support for the middle class and structural simplification of the tax regime. However, this growth story is complicated by external fragility, specifically the tariff war with the United States, and internal questions regarding data integrity as flagged by the IMF.

Moreover, the fruits of this growth remain unevenly distributed. The *World Inequality Report 2026* highlighted that inequality in India remains among the highest globally, with the top 1% of the population holding 40% of the country's wealth, while the top 10% command 58% of the national income. The income gap between the top decile and the bottom half has shown no sign of narrowing over the last decade.

3. The battle over the rules of the game

A large part of 2025 was marked by controversies over the fundamental «rules of the game». In fact, the legitimacy of the electoral process became a central axis of political conflict between the opposition parties, the government and key safeguard institutions. While not completely a novelty in the Indian political landscape, the contestation by opposition leaders of the integrity of the electoral process escalated the fears of the erosion of democracy in Modi's India to a higher level [Manor 2025]. According to the narrative pushed by opposition parties throughout much of 2025, the erosion of democracy was not limited to what happens between the elections – a key feature of electoral autocracies, a category to which India belongs, according to the V-Dem institute [V-Dem 2025, 6 March] – but it reached the heart of India's democratic system: the electoral process itself. This section analyses the opposition's «Vote Chori» (Vote Theft) campaign, the controversies surrounding the Special Intensive Revision (SIR) of the electoral rolls in Bihar, and the subsequent national rollout of this exercise. It argues that evidence of centralised, outcome-determining «rigging» did not emerge, which makes the opposition claims highly exaggerated. However, what the Vote Chori campaign demonstrated is that the body tasked with guaranteeing the fairness and regularity of the elections – the Election Commission of India (ECI) – contributed to promoting a loss of faith in India's democratic process and that the electoral rolls can be and are seriously compromised and are riddled with mistakes, even though this does not seem to have an impact on electoral outcomes.

Throughout 2025, the Congress and some of its allies in the INDIA bloc alleged that the BJP, through its control of the ECI, had been able to

manipulate the electoral rolls and manufacture majorities in both national and state elections. Essentially, the Congress accused the BJP of rigging the elections.

The opposition's argument rested on specific statistical anomalies and procedural opacity that they argued could not be dismissed as mere administrative error. The Maharashtra Assembly elections became a primary case study for this narrative. Rahul Gandhi highlighted a staggering discrepancy of approximately one crore voters (10 million) between the Lok Sabha and Assembly polls. He alleged that while the opposition coalition had swept the state in the Lok Sabha elections just four months prior, the subsequent Assembly elections saw a reversal where the BJP swept constituencies that had witnessed a surge in new voter enrolments. The explicit claim was that «elections were stolen» through the targeted addition of dubious voters in key constituencies.

This narrative was reinforced by allegations emerging from Haryana and Madhya Pradesh. In Haryana, Gandhi claimed that 25 lakh votes were «stolen», citing the existence of 5.21 lakh duplicate voters. He pointed to egregious examples of «photo-similar entries» – where multiple voter IDs featured identical photographs with different names – including one instance where a stock image of a Brazilian model appeared on the voter rolls. Similarly, in Madhya Pradesh, the Congress alleged a premeditated plan to «tamper» with voter lists to replicate the Maharashtra model.

The Vote Chori campaign was further fueled by the ECI's questionable reaction to the Congress's accusations. It is important to note that the central government had recently changed the rules for the appointment of the ECI. While before December 2023, the ECI was nominated by a committee comprising the Prime Minister, the Leader of the Opposition and the Chief Justice of the Supreme Court, the changes substituted the Chief Justice with a Cabinet Minister, essentially putting the nomination of the ECI entirely in the hands of the government.

The ECI rejected all of Gandhi's claims and asked him to submit an official complaint, which the leader of the opposition never did. But it remains that the ECI's conduct was prone to be interpreted as an attempt to manipulate the rolls. For instance, the ECI had quietly discontinued the use of a de-duplication software that had previously been used to identify and delete duplicate entries during the 2022 revision, without giving an explanation [Nath 2025, 6 November]. Furthermore, when questioned about discrepancies in Bihar, the ECI replaced machine-readable digital voter lists with non-searchable scanned image files on its public portals. This move made independent verification and data analysis much more difficult, fueling accusations that the ECI was actively shielding the rolls from scrutiny [Tiwari 2025, 9 August]. By framing the ECI not as a neutral arbiter but as an active participant in «destroying democracy», the opposition attempted to move the debate from policy differences to the existential question of

electoral fairness, in a way in continuity with the «Save the Constitution» campaign which had marked the 2024 general elections.

However, the Congress was never able to show a smoking gun, pointing at a centrally-organised operation to rig the elections. What it did show beyond any reasonable doubt was that the electoral rolls, in many parts of the country, were in a very bad shape, possibly because of local manipulation of the electoral rolls over the years and by multiple actors, likely cancelling each other out.

Ironically, this was the official reason why the ECI had decided to conduct a Special Intensive Revision (SIR) of the electoral rolls for the 2025 Bihar state elections. Launched by the ECI in June 2025 to «purify» electoral rolls and remove dead or absent voters, the Bihar SIR functioned in practice as a radical *de novo* rewriting of the voter list. Unlike routine revisions, this exercise fundamentally shifted the burden of proof for citizenship onto the voter, a departure from established electoral practice in India, where the state facilitates registration [Shastri & Yadav 2025, 7 October].

The procedural demands of the Bihar SIR were particularly onerous. For the first time, voters were required to submit an «enumeration form» within a strict deadline to remain on the rolls. Crucially, the ECI demanded specific «proof of citizenship» documents to accompany these forms, while rejecting the most common identification documents held by poor citizens, such as Aadhar cards, ration cards and even its own Electors Photo Identity Card (EPIC) as valid proof of citizenship. This created a bureaucratic trap: millions of citizens who possessed valid government-issued ID were suddenly at risk of deletion because they lacked birth certificates or land deeds that are often historically unavailable to marginalised communities. According to calculations by Yogendra Yadav's team, at least 50% of the adults of Bihar do not have such documents [Mishra 2025, 22 August].

The immediate result was a massive deletion of voters from the rolls. The exercise initially excluded approximately 6.5 million voters from the draft rolls, a deletion rate that Yogendra Yadav, a petitioner in the Supreme Court case challenging the SIR, described as the «biggest disenfranchisement exercise in history». The demographic impact of this «purification» was highly skewed. Detailed analysis revealed that the gender ratio of the electorate plummeted, with the number of women voters per 1,000 men dropping to 892 – the lowest since 2020 – resulting in approximately 1.6 million «missing women» voters [Shastri & Yadav 2025, 7 October]. Furthermore, districts with high Muslim populations, such as those in the Seemanchal region, recorded some of the highest rates of deletion, raising concerns about targeted exclusion.

The chaos was mitigated by judicial intervention. The Supreme Court of India, monitoring the process, forced the ECI into «damage control» mode. The Court compelled the Commission to publish the list of excluded voters and eventually directed that Aadhaar be accepted for verification.

Furthermore, the ECI allowed people who could trace a relative in the 2003 rolls to remain in the revised ones. This mitigated exclusion errors. Yet, despite these interventions, the final rolls remained riddled with errors. The list contained over 500,000 entries with «gibberish» values, over 51,000 invalid relationship entries, and many «dead» voters who were later found to be alive (some were shown in the Supreme Court) [*The Wire Staff* 2025, 10 October].

Eventually, the final rolls actually used during the elections contained 74.5 million voters as against 78.9 million before the SIR began. The great majority of the deletions – partly cancelled out by fresh additions – were for routine reasons like deaths, relocations, and duplications. Perhaps the most mysterious aspect remains the deletion of many women voters. This could perhaps be explained by low literacy rates among women in Bihar, as this might have impacted their ability to comply with the ECI's requests. The deletion of many women from the rolls, however, also suggests that the exercise, which did result in disenfranchisement of many vulnerable citizens, was most probably due to lack of administrative capacity by the ECI, rather than due to manipulation from above. In fact, women tend to vote for both the BJP and Nitish Kumar's Janata Dal (United) (a BJP ally), and it would have made little sense for the ruling party to target their own «vote bank» [Tiwarei 2025, 7 October].

In fact, the Bihar SIR – and the subsequent electoral results – seem to confirm that evidence of rigging has not emerged. For instance, villages with high deletion rates did not see significant changes in turnout rates, as compared to previous elections, and winners did not change. Moreover, of the 28 close contests – defined as a constituency where the winning margin was less than 2% of the votes cast – the National Democratic Alliance won 50%, while the opposition Mahagathbandhan won 48%, pretty much as statistics would predict [Tiwarei 2025, 5 December]. Reporters also visited Pranpatti village in Bihar – a polling station with one of the highest deletion rates – revealing that the «dubious» voters added in previous years were often the result of local-level manipulations for municipal or panchayat elections rather than a centrally directed scheme.

On 4 November 2025, the ECI launched an SIR across nine states and three Union Territories: Tamil Nadu, Kerala, West Bengal, and Puducherry (where elections are due in 2026); and Andaman and Nicobar Islands, Lakshadweep, Chhattisgarh, Goa, Gujarat, Madhya Pradesh, Rajasthan and Uttar Pradesh. Assam, also going to the polls in 2026, was excluded from the Intensive revision (only a «normal» revision will take place, where residents will not be required to produce proof of citizenship). The ECI explained that the state was left out because the compilation of the National Register of Citizens (a draft of which was published in 2019, but has not been brought forward [Torri 2020] is incomplete, and a SIR would require a harmonisation of the NCR and the electoral rolls. Critics

argued that a more compelling reason is that the NRC's draft left out approximately 1.9 million residents, a majority of whom (about 1.1 million) are Hindu Assamese or Bengali, both part of the social coalition supporting the BJP in the state [Choudhury 2025, 16 December]. Once again, the ECI's conduct, even conceding that the reason provided is compelling enough to make Assam an exception, was far from reassuring and cultivated the climate of fear among opposition parties and supporters that the electoral process is under threat.

In sum, while the «Vote Chori» campaign did not produce any proof of centralised ballot rigging that altered national or state verdicts, the ECI failed to restore confidence, mainly through its lack of transparency, arbitrary rule-changes and exclusionary design. The ultimate casualty of 2025 was not just the voters left off the lists, but the legitimacy of the system itself. Democratic theory posits that consolidation requires all actors – voters, parties, and institutions – to accept elections as «the only game in town». When the opposition believes the game is rigged, many voters believe them, and democracy suffers a crisis of legitimacy. This crisis is exacerbated by the plummeting credibility of the Election Commission of India. Surveys by the Centre for the Study of Developing Societies (CSDS) indicated that public trust in the ECI had hit «rock bottom», a decline accelerated by the Commission's combative response to criticism, its refusal to hold independent inquiries, and its reluctance to work transparently.

4. State elections in 2025

In 2025, two important state elections took place: the Territory of Delhi and Bihar. Both the results further cemented the power of the BJP, achieving a majority in the Delhi elections, and the BJP-led National Democratic Alliance (NDA) securing a two-thirds majority in the Bihar elections, with the BJP emerging as the single largest party. Both these elections, combined with those of Haryana and Maharashtra in 2024, contributed to the BJP's winning spree following the *Lok Sabha* (relative) debacle in June 2024, where the BJP failed to secure an absolute majority of the seats [Manor 2025]. This section unpacks both the elections held in 2025 and the background, relevance, and factors contributing to the results.

4.1. Delhi

Delhi Legislative elections were held on 5 February 2025 across 70 seats, the results of which were announced on 8 February 2025. The BJP won 48 seats out of the 70, the incumbent Aam Aadmi Party (AAP) won 22 seats, while the Indian National Congress (INC) or Congress did not win any seats. The Member of Legislative Assembly (MLA) from Shalimar Bagh, Mrs Rekha

Gupta, was sworn in as the Chief Minister (CM) on 20 February 2025, marking the BJP's return to power in Delhi after 27 years.

Before delving into the electoral issues and unpacking the result, we believe it is important to explain the year leading up to the elections in Delhi. The AAP faced a major setback due to the Delhi liquor policy money laundering case. In this case, it was alleged that the new excise policy introduced by the AAP government involved procedural lapses and irregularities in how licences and fee concessions were handled [Bose 2023, 4 October]. Investigating agencies, including the Enforcement Directorate (ED) as well as the Central Bureau of Investigation (CBI), found several irregularities, even though it should be mentioned that the impartiality of investigative agencies in politically sensitive cases has been put into serious question over the last few years [Das, Chaturvedi and Nag Choudhury 2024, 22 March]. Several of the AAP leaders, such as Deputy CM Manish Sisodia, Sanjay Singh, Satyender Jain, amongst others, were jailed. Most notably, CM Arvind Kejriwal was arrested on 21 March 2024, after skipping nine ED summons, making him the first sitting CM of India to be arrested – just a few weeks before the general elections. The Supreme Court granted him interim bail from 10 May 2024 to 1 June 2024 on the grounds of campaigning for the general elections. Finally, he was given bail on 13 September 2024, after spending more than five months in prison. Kejriwal then resigned as the CM on 21 September 2024 in light of these corruption charges, and Atishi Marlena was sworn in as the CM. The AAP strongly denied such charges, protested Kejriwal's arrest, and argued that these charges are politically motivated.¹ The AAP, nonetheless, fought the elections under Kejriwal's leadership.

The credibility crisis for the AAP was two-fold. One, it was at the centre of many corruption allegations, such as the liquor policy case, cash for ticket controversy, as well as the CM's residence controversy. Of course, for a party which was born out of an anti-corruption movement, these accusations represented a major credibility issue [Biswas 2013, 9 December]. This, of course, is the second side of the problem, and it generated anti-incumbency feelings among the electorate. Furthermore, the «Shesh Mahal» controversy [Saxena 2025, 8 February] around the renovation of the CM's residence added further fuel to the fire. The BJP highlighted a Comptroller and Auditor General (CAG) report in which it was stated that the renovation cost had increased from an initial estimate of Rs 7.91 crore (\$ 1 million) to Rs 33.6 crore (\$ 4 million) by completion. These accusations – even if not demonstrated – dented the image of the CM as a clean politician and a «common man» – another serious blow to his image, given that the very name of his party is the «Party of the Common Man» (Aam Admi Party).

All these factors really added up. As a result, according to a survey done by Lok Niti Centre for the Study of Developing Societies (CSDS), nearly two-

1. In February 2026, Delhi High Court cleared Arvind Kejriwal of all charges.

thirds of the respondents felt that the AAP government was corrupt, while around 28 per cent of the respondents felt that the government was very corrupt. Furthermore, the fatigue with incumbent MLAs also had a role to play in the AAP's defeat. According to the same survey, around half of the respondents were unhappy with the work done by their MLAs. More importantly, around 33 per cent of the respondents felt that their MLA's performance was very disappointing. Contrast this with another survey done by CSDS, where seven out of ten respondents were satisfied with the central government's (BJP) work [Shastri, Kumar and Palshikar 2025, 10 February].

Furthermore, according to the Lok Niti survey, the local issues remained central to voters in Delhi. For instance, Kejriwal had promised in 2020 that he would cleanse the Yamuna River and if he did not do so, the public could reject him. However, around the end of his term, CM Kejriwal started pointing out that the task was mammoth as the river is «poisoned». The issue of the Yamuna River also caught social media's attention, and photos of the river with toxic foam were being shared. CM Kejriwal's excuse did not carry much weight. The survey reveals that eighty per cent of the respondents thought of the Yamuna River as an important concern. The Yamuna issue underlies the issue of general cleanliness in Delhi, with ninety per cent of the respondents being disappointed with the lack of cleanliness in the city, while eight out of ten were upset with the level of air quality and the lack of access to clean drinking water [Shastri, Kumar and Palshikar 2025, 10 February].

However, the AAP has also had a history of constructive reforms, such as Delhi's government schools as well as *Mohalla clinics* (community clinics). The Mohalla clinics provided basic primary healthcare to the underserved neighbourhoods in Delhi. In 2023, there were roughly 1.93 crore (19 million) appointments reported in the Mohalla clinics [Upadhyay 2025, 13 January], while millions benefited from these clinics every year since their inception in 2015. Furthermore, in terms of government schools in Delhi, the government undertook sustained reforms. For instance, according to Yamini Aiyar, initiatives such as Mission Buniyaad helped increase learning levels remarkably [Aiyar 2024]. However, despite the prominence of these bread-and-butter issues, it is clear that something went wrong with the AAP's political messaging. For instance, PM Modi's promise to cleanse the Ganga – a promise that remained largely unfulfilled – did not have any impact on his popularity, signalling that the image of CM Kejriwal and his party – dented by corruption scandals – had a negative impact on how voters decided to evaluate his government's performance.

The AAP's defeat can also be explained by the reduced social coalition supporting the party and the corresponding larger one which voted for the BJP. According to the Lok Niti survey, the social coalition that AAP built over the years – which included Dalits and Muslims – was replaced by a broader social coalition manufactured by the BJP. Barring the Gujjars and the Yadavs, the BJP made strong inroads among backward castes as well as

maintained its lead among the upper castes, a traditional «vote bank» of the party [Shastri, Kumar and Palshikar 2025, 10 February]. Furthermore, the BJP made steady inroads in the rural seats of Delhi (eighteen out of the 70 seats are considered to be rural seats) [Das 2025, 9 February]. In 2025, the BJP won 13 of them, with a vote share of more than 50 per cent in six seats. If you compare this to AAP's electoral zenith in 2015 it won 18 out of 18 seats, while it won 17 out of 18 in 2020 [Dixit 2025, 10 February]. This time around, the voters felt that the AAP was more focused on the urban poor than the «rural» poor. It was also noted that many of the rural constituencies were in shambles and the representatives inaccessible: «Voting for the BJP seemed a smart choice for people in rural areas. We expected more from a person who emerged from an *andolan* (protest). Initially, CM Kejriwal assured us that he would resolve the issue of house tax, but it was never tabled», said a village chief. Furthermore, the President of Centre for Youth Culture Law and Environment (CYCLE) [Das 2025, 9 February], an organisation that pressed for rural issues, also noted that they were fed up with the constant nagging and excuses of CM Kejriwal.

Additionally, it can also be argued that by not teaming up with the Congress, the AAP worsened its position. For context, the AAP was part of the Congress-led Indian National Developmental Inclusive Alliance (INDIA) bloc formed in 2023 to fight the 2024 general elections against the BJP. The AAP and Congress had an alliance in Delhi for the general elections, but did not fight together in the assembly elections. In the 2025 Assembly Elections, the Congress saw a marginal increase in its vote share, which directly benefited the BJP while adversely affecting the AAP [Saxena 2025, 8 February]. For instance, in 13 seats the winning margin of the BJP was less than the number of votes the Congress got. Thus, if both parties were allied, these 13 seats could have flipped the other way and made the election a much more tightly contested one than it turned out to be (even though votes do not add up perfectly in these situations). Lastly, not allying with the INC naturally led to the Congress campaigning vehemently against the AAP. Like the BJP, Congress leader Rahul Gandhi sharpened his attacks on CM Kejriwal on 'Sesh Mahal' and false promises [Saxena 2025, 8 February]. Thus, it can be said that by not sticking with the INDIA alliance, CM Kejriwal invited further trouble.

4.2. Bihar

The Bihar Assembly election was completed in two rounds: one on 6 November 2025 and one on 11 November 2025, while the results were declared on 14 November 2025. The NDA won a landslide majority, winning 202 of the 243 seats. Within the alliance, the BJP won 89 seats, the Janata Dal (United) (JD(U)) won 85, while the Lok Janshakti Party (Ram Vilas) (LJP (RV)) won 19, and the Hindustani Awam Morcha (HAM) and the Rashtriya Lok Morcha (RLM) won five and four seats, respectively.

On the other hand, the opposition Grand Alliance or the Mahagath-

bandhan (MGB), comprising the Rashtriya Janata Dal (RJD), the INC, various factions of communist parties, among other small parties, only managed to secure 35 seats, of which the RJD won the bulk (25), while Congress got six seats. This election was a major boost to the BJP and JD(U), which won 15 and 42 seats more than their 2020 tally, respectively. On the other hand, Tejashwi Yadav's RJD saw a loss of 50 seats from its previous performance, while the Congress saw a dip of 13 seats, bringing its tally closer to Asaduddin Owaisi's All India Majlis-e-Ittehadul-Muslimeen (AIMIM), which won five seats out of the 25 it contested. The table below summarises the electoral results. As it is evident from the last column, vote shares are largely stable, with the notable exception of Nitish Kumar's JD(U), which increased by almost 4 percentage points. This was a remarkable achievement, considering that Kumar had been chief minister of the state for 19 out of the previous 20 years.

It is important to know the developments of 2023-24 before diving into an analysis of the electoral issues of the election. In August 2022, CM Nitish Kumar (the incumbent then and now) quit his alliance with the BJP and moved to the MGB [Dhar 2024, 28 January]. In the same year, CM Nitish Kumar publicly declared his desire to form a grand pan-India alliance. In July 2023, the alliance finally took shape, consisting of the Congress, the JD(U), the RJD and other major political parties across India [*The Economic Times* 2022, 25 September]. The alliance formed was called INDIA, an acronym for Indian National Developmental Inclusive Alliance [Maiorano & Khattri 2024].

TABLE 1 RESULTS OF THE 2025 ELECTIONS TO THE LEGISLATIVE ASSEMBLY OF BIHAR			
Alliance	Party	Seats won (difference from 2020)	Vote share (difference from 2020)
NDA	BJP	89 (+15)	20.08 (+0.62)
	JD(U)	85 (+42)	19.25 (+3.86)
	LJP (RV)	19 (+19)	4.97 (New)
	HAM (S)*	5 (+1)	1.17 (+0.28)
	RLM	4 (+4)	1.06 (New)
	Total	202 (+81)	46.56 (+9.30)
MGB	INC	6 (-13)	8.71 (-0.77)
	RJD	25 (-50)	23.00 (-0.11)
	CPI (ML) L **	2 (-10)	2.84 (-0.31)
	Other MGB parties	2 (-7)	3.38 (-0.28)
	Total	35 (-80)	37.93 (-0.01)

Others	AIMIM***	5 (0)	1.85 (+0.19)
	BSP	1 (+1)	1.62 (+0.13)
	Others	0 (-2)	11.87 (-9.61)
	Total	6 (-1)	15.34 (-9.29)
Total		243	100

* Hindustani Awam Morcha (Secular), political coalition in Bihar, India, led by the Rashtriya Janata Dal (RJD), including the Indian National Congress (INC), and Left parties.

** Communist Party of India (Marxist-Leninist) Liberation.

*** The AIMIM (All India Majlis-e-Ittehadul Muslimeen, lit. «All India Council for Unity of Muslims») or Majlis, is a right-wing Indian political party based primarily in the old city of Hyderabad.

Source: Election Commission of India.

As part of the new alliance, in 2023, the government led by CM Nitish Kumar conducted the first-ever caste census in independent India’s history in Bihar [Tewary 2023, 6 January]. This led to national politics being centred around caste for months, as the census had revealed the severe underrepresentation of OBC castes in virtually all professions and especially in the public sector, where reservations (27%) covered only a fraction of their share of the population (around 63% of the population) [Mishra 2023, 19 October].

In January 2024, CM Nitish Kumar once again switched camps, breaking his alliance with the MGB and rejoining the NDA [Mukherjee 2025, 7 August]. In the months that followed, Congress leader Rahul Gandhi made the caste census a central demand of his campaign, arguing that an enumeration of OBC and other disadvantaged communities was essential to ensuring equitable representation and resource distribution [Dhillon 2024, 27 February]. Mr Gandhi also warned repeatedly that if the BJP returned to power with a full majority, they would amend the Constitution in ways that would weaken or dismantle the reservation system, a message that resonated strongly among Dalit, OBC, and Adivasi voters. The results of the 2024 Lok Sabha elections reflected the impact of this campaign: the BJP suffered significant losses and fell short of a parliamentary majority, widely attributed in part to the mobilisation of disadvantaged communities around the twin issues of constitutional protection and caste-based enumeration [Sen & Khattri 2024, 19 July]. This meant that the BJP needed support from its allies, Nitish Kumar’s JD(U), with 12 seats, and Chandrababu Naidu’s Telugu Desam Party (TDP), with 16 seats, made them key allies of PM Modi’s party. Therefore, it can be argued that the Bihar Assembly Elections of 2025 were particularly important not only at the state level but also as a litmus test of the NDA’s stability, given the historical pattern of alliance switching of CM Nitish Kumar.

Despite fighting a fifteen-year anti-incumbency, voter fatigue and health allegations, CM Kumar led the NDA to a two-thirds majority in the elections. One of the key factors that can explain this outcome is voter con-

tentment with the status quo and satisfaction with government delivery. The NDA campaigned on state-level issues, arguing that the *double-engine sarkaar* (the government of Nitish-Modi, allied both at the centre and in the state) is necessary for Bihar's development [Kumar 2025, 18 November]. According to a survey, half of the voters believed that it is necessary that the party in power at the Centre should be in power in the state, and roughly 75 per cent of the voters were satisfied with the governments at both levels [Kumar 2025, 18 November]. This belief was seemingly grounded in contentment with government delivery. In terms of key public services and infrastructure, more than two-thirds of the voters thought that the availability of electricity and the conditions of roads improved (75 and 70 per cent of respondents, respectively), while more than 60 per cent felt that access to clean water and conditions of government schools improved [Kumar 2025, 18 November]. In terms of law and order, nearly half of the respondents perceived an improvement [Kumar 2025, 18 November].

Furthermore, in terms of welfare, both the BJP (particularly since PM Modi took office) and the JD(U) under CM Kumar have designed and implemented women-centric schemes. For instance, CM Kumar's policy of an alcohol ban, distributing cycles and school uniforms to schoolgirls, as well as the Jeevika Didi scheme, which provides for social and economic upliftment of women in rural Bihar, have historically mobilised women voters towards the NDA [Kumar 2025, 18 November]. In the state, this time around, similar to what the BJP did in Madhya Pradesh and Maharashtra, the NDA government in Bihar rolled out a scheme before the elections in which Rs. 10,000 was transferred to the accounts of 1.21 crore (12 million) women to start an enterprise, which further strengthened the traction amongst women towards the NDA [Tiwary 2025, 16 November]. It should be noted that cash transfers to women are a nationwide trend, with as many as 12 states (ruled by the NDA or other parties) having programmes in place, while others are considering their introduction [Biswas 2025, 9 December].

To conclude, it can be argued that with a robust alliance with the Centre and a history of delivery-oriented governance, CM Kumar defeated anti-incumbency and rode the NDA towards a landslide majority.

In terms of social coalition, the RJD-led MGB was able to retain most of its traditional support among Muslims and Yadavs (which constitute roughly 32 per cent of the state's population) but has failed to make inroads in other groups [Tiwary 2025, 16 November]. On the other hand, CM Kumar managed to command sway among Extremely Backward Castes (EBCs) and Mahadalits, who constitute 31 per cent of the 15 per cent Dalit population, non-Yadav Other Backward Classes (OBCs) and upper caste groups, who together form roughly 15.5 per cent [Joy 2023, 2 October] of Bihar's population [Tiwary 2025, 16 November].

This time around, the MGB suffered dents in their core voter groups, too. For instance, the MGB garnered the support of 84 per cent Yadavs in

the 2020 elections but could only manage to get 74 per cent in 2025 [Kumar 2025, 21 November]. On the other hand, the rise of AIMIM, with an explicit Muslim-centred social base, dented the Muslim vote for the MGB, which fell by six percentage points to 70 per cent in 2025 [Kumar 2025, 21 November]. On the other hand, the NDA saw an increase in its support amongst its traditional voters: 54 per cent of the upper caste groups voted for the NDA in 2020, while the number went up by 13 percentage points to 67 per cent in 2025 [Kumar 2025, 21 November]. Furthermore, 60 per cent of the Dalits voted for the NDA, as it included two parties with a sizeable Dalit support base, the Lok Janshakti Party (LJP) and the HAM [Kumar 2025, 21 November].

It can be argued that one of the key reasons for the stickiness of the non-Yadav and non-Muslim voters towards the NDA is the looming legacy of the RJD's so-called 'Jungle Raj' of the 1990s and early 2000s, a theme repeatedly mentioned by the NDA during the electoral campaign [Kumar 2025, 21 November]. The term Jungle Raj broadly refers to the criminalisation of politics during the rule of Tejashwi Yadav's parents, Lalu Prasad Yadav and Rabri Devi. During their rule, kidnappings, caste-based massacres and murders dominated headlines. For instance, under Rabri Devi's rule, between 2001 and 2004, there were 1,527 cases of kidnappings compared to 429 between 2006 and 2009. Furthermore, around 58 massacres took place between 1991 and 2001, killing 566 people, including 343 Scheduled Caste (SC)/Other Backward Caste (OBC) agricultural labourers and 128 upper caste landlords [Singh 2025, 31 October]. According to author Mrityunjay Sharma, «beneath the veneer of social justice, state institutions were systematically hollowed out». The fact that 144 out of 384 Indian Administrative Service (IAS) officers sought central deputation in 1992 reflects the grim reality of that time [Singh 2025, 31 October]. The horrors of the bygone era resurface every election and arguably shape voter behaviour of non-Yadav groups, who counter-mobilise and consolidate in voting against the RJD [Singh 2025, 31 October]. Thus, it can be argued that the looming legacy of the Jungle Raj hinders the RJD-led MGB from expanding its electoral footprint beyond its core Muslim-Yadav supporters, which ultimately led to a debacle in their electoral performance in the 2025 Assembly elections.

5. *Conclusions*

The year 2025 stands as a testament to the resilience of the BJP's political hegemony and the simultaneous deepening of India's institutional crisis. Recovering from the electoral setbacks of 2024, the Modi government successfully navigated external security shocks – balancing military assertiveness in Pahalgam with strategic restraint in Delhi – while reasserting its dominance through decisive victories in Bihar and the national capital. This

political consolidation, however, unfolds against a backdrop of economic paradoxes; while headline GDP figures suggest robust growth, the IMF's data downgrade and escalating trade tensions with the United States reveal significant structural vulnerabilities obscured by fiscal populism.

Crucially, the events of 2025 highlight a dangerous fissure in Indian democracy: the erosion of faith in the umpire. While the opposition's «Vote Chori» campaign failed to provide a «smoking gun» regarding outcome-determining fraud, the opaque and exclusionary handling of the Special Intensive Revision by the Election Commission of India has inflicted lasting damage on the legitimacy of the electoral process. The opposition's inability to translate these institutional concerns – or the economic distress of the marginalised – into a winning electoral coalition underscores their continued strategic paralysis. Ultimately, 2025 concludes with the image of a regime that is politically more secure than ever, yet presiding over a democratic system where the fundamental consensus on the fairness of the process is fraying. India moves towards 2026 as a polity where the government's grip is firm, but the integrity of the «rules of the game» remains deeply contested.

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