

Landslides, Tsunamis and Jhatkas: State Elections 2026

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The results from five state elections were declared in India yesterday. It has been an exciting time for the news media, outdoing themselves with headlines and soundbites. The Lotus has Bloomed (lotus is the BJP's symbol), Jhaalmoori ka Jhatka,¹ Rahul: 99 defeats, not out (somewhat unfair for today as Congress won Kerala), Thalapathy Tsunami in Tamil Nadu,² Hat Trick for Hemanta (Hemanta's 3rd win in Assam), and so on. The table shows the key information for the five states at play.

State	Incumbent	Winner	SIR deletions / % of electoral roll ³
Assam	NDA ⁴	NDA incumbent wins a third term	0.63 million / ?
Kerala	CPI (M) ⁵	INC ⁶ wins after 10 years; Kerala tends to swing between INC and CPI so this is not unprecedented but a change in power regardless	0.85 million / 3.24%
Puducherry	NDA	NDA incumbent (AINRC led) ⁷ wins a third term	0.1 million / 7.5%
Tamil Nadu	DMK ⁸ incumbent loses; incumbent CM loses constituency	TVK ⁹ gets the most seats; unprecedented, a new party, breaks nearly 60 years of 'Dravidian duopoly'; currently hung government	7.4 million / 11.5% high deletions with no controversy
West Bengal	TMC ¹⁰ incumbent loses; incumbent CM loses constituency	BJP wins; unprecedented win, breaks 15 years of TMC and 30 years of Communist party rule	9 million / 10.9% high deletions with plenty of controversy

¹ This one is really tough to explain. TMC said BJP, with its vegetarian stance, would take away the beloved fish diet of Bengalis. In response, Modi had eaten the famous Bengali street snack, jhaalmoori. The election is thus being seen as the 'shock of jhaalmoori'.

² Thalapathy is a Vijay movie

³ The number and % of voter names deleted from the electoral rolls in the verification exercise called SIR – Special Intensive Revision. The % for Assam could not be found.

⁴ National Democratic Alliance (led by BJP)

⁵ Communist Party of India (Marxist)

⁶ Indian National Congress

⁷ All India N. R. Congress

⁸ Dravida Munnetra Kazhagam

⁹ Tamilaga Vettri Kazhagam

¹⁰ Trinamool Congress

The Tamil Nadu and West Bengal cases are the most interesting ones, by themselves and in comparison.

The most closely-watched, though not the only unprecedented election, was West Bengal. Exit polls suggested that BJP was going to win, and potentially win big in West Bengal – it has won 2/3rd of the seats, a clear majority and a landslide. TMC remains an opposition party with a significant presence of nearly 1/3rd of the rest of seats. However, the loss of her own constituency of Bhubhanipur is significant for the incumbent CM, Mamata Banerji. A number of political scandals of recent years (Saradha ponzi scheme, Sandeshkhali abuse of power case, RG Kar murder and aftermath, Mamta's intrusion into the ED raid), long-term poll violence, out-migration, all these factors played into anti-incumbency. The Sandeshkhali, RG Kar case, and electoral violence are said to have motivated a strong female vote for BJP (some initial numbers suggest that BJP did well in areas that had high turnout of the *mahila* or female vote – regardless of the numbers, it's the narrative that BJP and their voters are telling).

The SIR exercise (Special Intensive Review), a special case of the Election Commissions' regular verification of electoral rolls, became especially politicized in West Bengal. It is framed by TMC and others as a reason for the BJP's win, Mamta has been calling it an 'immoral victory'. In West Bengal, the proportion of SIR deletions that were Muslim voters was higher than the proportion of Muslim voters in West Bengal (not by too much; substantially higher was the Muslim share among SIR cases that are still under appeal). The impact of the SIR deletions necessitates more attention – SIR is a complex exercise that depends on the demography of a state (for example, SIR both deletes dead or duplicate or inadequately documented voters¹¹, it also adds new voters such as those that just turned 18). The reason that the SIR exercise in West Bengal became especially political is because of the long-term migration of Bangladeshi migrants into West Bengal (which is a border state); this undocumented migration is difficult to enumerate, but it plays into issues of religious conflict, geopolitics (relationship with Bangladesh, minority rights in Bangladesh), jobs and welfare benefits, national politics (the SIR has resonances with recent legislations related to citizenship). When judicial officers went to Bengal to adjudicate SIR cases, they were prevented from working.¹² Thus, SIR has been more controversial in West Bengal than other states, including other non-BJP states – because in West Bengal it brings up questions of religion and undocumented migration. Tamil Nadu had a higher percent of SIR deletions than West Bengal with little controversy – Tamil Nadu also had an

¹¹ I say 'inadequately documented' because the fact that a voter is on the roll suggests that at some point in time they were possessed of *some* documentation.

¹² <https://www.ndtv.com/india-news/bengal-election-sir-7-judicial-officers-held-hostage-in-bengal-for-9-hours-over-sir-deletion-11300103>

unprecedented electoral shakeup with no blame of EVMs, rigging, SIR or poll violence.

Discussions over the effect of SIR have been loud and contentious.

Commentators (I have been following various TV news channels) have pulled out information showing that deletions were sometimes high in BJP strong districts, low in opposition-led districts, that TMC has won 13/20 of the districts with the highest deletions. One commentator said it was a ‘party agnostic exercise’ – hard to comment on this (because what makes a district a party stronghold is itself based on demographics; there is endogeneity here). BJP went from 77 seats in 2021 to being ahead in 207 seats in 2026. SIR effect would need to take into account that BJP was not starting from zero, it was building momentum. And, it is likely that there have been symbolic and secondary effects of SIR (in driving higher turnout, in sending a message about citizenship that might have aided the ‘Hindu consolidation’ that is being discussed).

The Tamil Nadu case also shows an unprecedented anti-incumbent election – Vijay, a major Tamil film star won with his new political party, TVK. The incumbent DMK party’s stress on the north-south divide, anti-Hindu statements, language politics did not hold up against Vijay’s charisma and promise of change. Whether Vijay’s win is really a break with the ‘Dravidian model’ is hard to tell – this is uncharted waters. Vijay does not have majority in Tamil Nadu and is looking for coalition partners. A blame game is apparently underway – a pre-poll alliance was proposed to the Congress by TVK, but the Congress decided, to their future detriment, to go with DMK (another dynastic party).¹³ There might still be a possible post-poll alliance. Vijay will need allies, not only to build a coalition but also for the administrative and governance support of his new party. At present with just 5 seats, Congress support to TVK is not enough to form a government.

National reverberations

After the 2024 general / national election, though BJP won the election, this win was framed as a ‘defeat’ as it lost ground. These 2026 regional wins are being termed a ‘saffron wave’, or ‘the lotus blooms’ (lotus is the BJP’s election symbol). If regional elections are an indication of the national mood, these wins are a positive sign for the BJP.

The INDI Alliance is the national opposition alliance that includes Congress (just won Kerala), TMC (just lost West Bengal), DMK (just lost Tamil Nadu), Samajwadi Party (out of power in UP for 14 years), and other parties. It is the main national opposition to the BJP. This current round of losses and unprecedented political shifts will lead to a scramble to re-align coalitions /

¹³ <https://www.hindustantimes.com/india-news/did-tvk-make-congress-a-pre-poll-offer-blame-game-begins-101777887132856.html>

alliances. It has weakened existing regional leaders (Mamta, Stalin) from challenging Rahul's leadership for the opposition alliance. While the Congress is the party that could be the face of a national opposition, Rahul has so far not proved to be effective. As long as dynastic politics keeps a hold on the Congress, it will leak talent. These elections, and other recent political events (such as the fracturing of the Aam Aadmi Party in Punjab), show an opposition that is further weakened, rebooting, regrouping.

In his column today (Indian Express, 5/5), Pratap Bhanu Mehta noted that the BJP's win showed its political will, its 'ambition, perseverance, and political ruthlessness'. He noted some of the institutional aspects attending this win, such as the SIR. He did not mention the voter – as if this was solely a story of the BJP's organizational strengths and political will to win. Eventually people voted in the BJP, they voted in TVK. They responded to the message. These elections, the winners, the losers, the also-rans, are a story of political (dis)organization, (in)discipline, (in)efficiency, messaging. They are also a story of voters who were watching and listening, and who gave their verdict.