

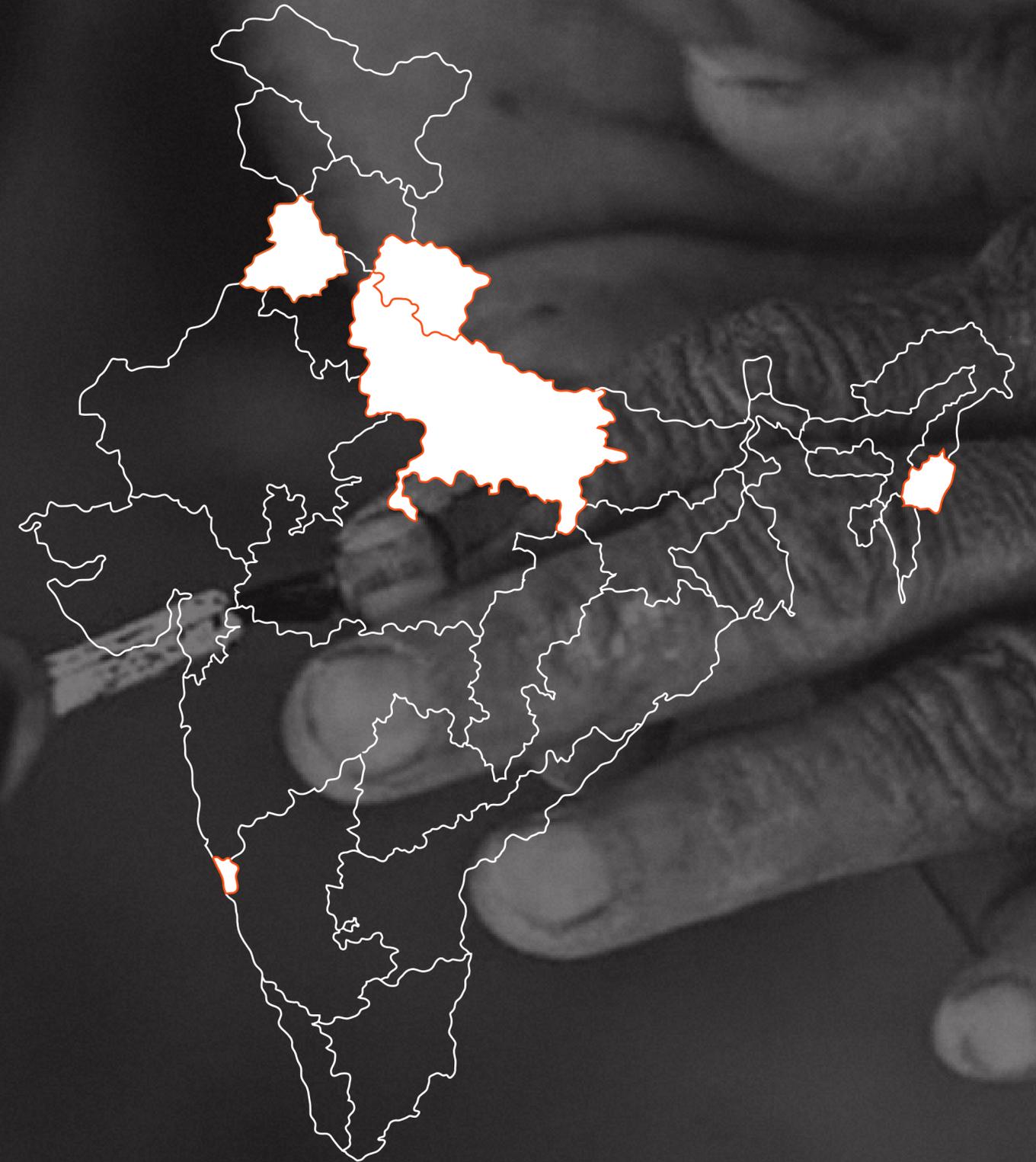
SPECIAL REPORT

INDIA'S 2022 ASSEMBLY POLLS DECODED

WHAT'S NEXT FOR YOU

MARCH 2022

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FOREWORD

BJP reaffirms political supremacy; a new national party emerges

The latest round of state elections has once again reaffirmed the political supremacy of the Bharatiya Janata Party (BJP). It won four of the five states, including Uttar Pradesh—India’s most populous—convincingly.

The only state where it was beaten hands down—Punjab—saw the arrival of the Aam Aadmi Party (AAP) on the national stage, as it got its first real state to rule, after being in power in the national capital for the past seven years.

The win in other three states—Uttarakhand, Goa and Manipur—further boosts the chances of the BJP of strengthening itself in the run up to the 2024 parliament elections, when it will seek a third straight term in office.

The BJP’s win in Uttar Pradesh—the country’s most politically important state as it sends the highest number of representatives to parliament—means it becomes the first party to win two consecutive terms in more than 30 years. It also signifies the BJP brand of politics and policies have found a strong place in the minds of people, as the party’s vote share in the key state increased from the last elections in 2017.

At a national level, the wins give the BJP and Prime Minister Narendra Modi the confidence to push through policies that have focused on making India self-reliant following the global uncertainties, triggered first by the COVID-19 pandemic, and now by a war in Europe. India faces several challenges as it emerges from many months of lockdown and rebuilds its economy to fulfil the government’s dream of becoming a \$5 trillion economic powerhouse. We could probably expect a more formidable push to the “Make in India” programme. The

political wins provide the policy stability that is needed to wade through these times of black swan events. So, expect focus on further building India’s digital and health capabilities, two critical areas that will receive further investments as the BJP government broadens its focus on digitalization of key services and health infrastructure, which is critical in the post-pandemic world.

For AAP, it is a time to celebrate. The win in Punjab is a massive boost for the eight-year-old political party, which seems to have replaced the Congress. The grand old party of India lost in all states, raising serious concerns about its viability as an alternative in the face of the continuing push by the BJP.

The results of state elections in Uttar Pradesh, Punjab, Uttarakhand, Goa and Manipur at this juncture have national ramifications, especially with regard to the policy direction of the Prime Minister Narendra Modi government at the centre. This report captures the likely overall movement that may impact investment and business decisions.



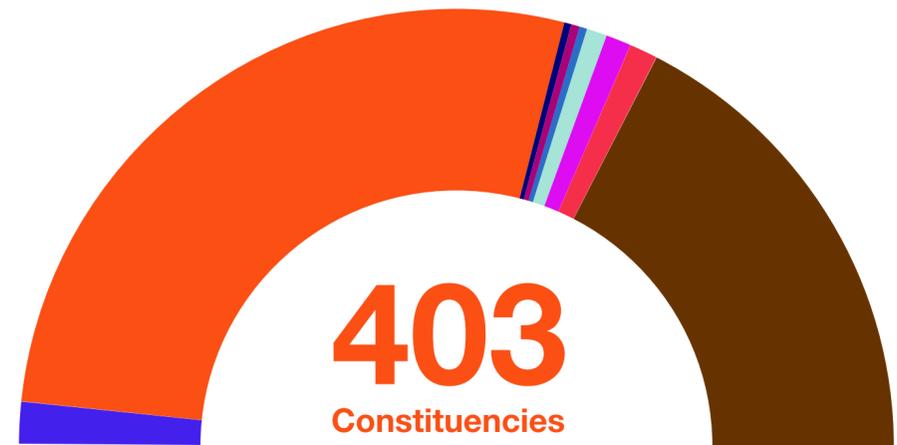
RAHUL SHARMA
Managing Director

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ELECTION RESULTS

UTTAR PRADESH



● ADAL ● BJP ● BSP ● INC ● JDL ● NINSHAD
● RLD ● SBSP ● SP

Party	Won
Apna Dal (Soneylal)	12
Bahujan Samaj Party	1
Bharatiya Janata Party	255
Indian National Congress	2
Jansatta Dal Loktantrik	2
Nirbal Indian Shoshit Hamara Aam Dal	6
Rashtriya Lok Dal	8
Samajwadi Party	111
Suheldev Bharatiya Samaj Party	6
Total	403

PUNJAB



● AAP ● BJP ● BSP ● INC ● IND ● SAD

Party	Won
Aam Aadmi Party	92
Bahujan Samaj Party	1
Bharatiya Janata Party	2
Independent	1
Indian National Congress	18
Shiromani Akali Dal	3
Total	117

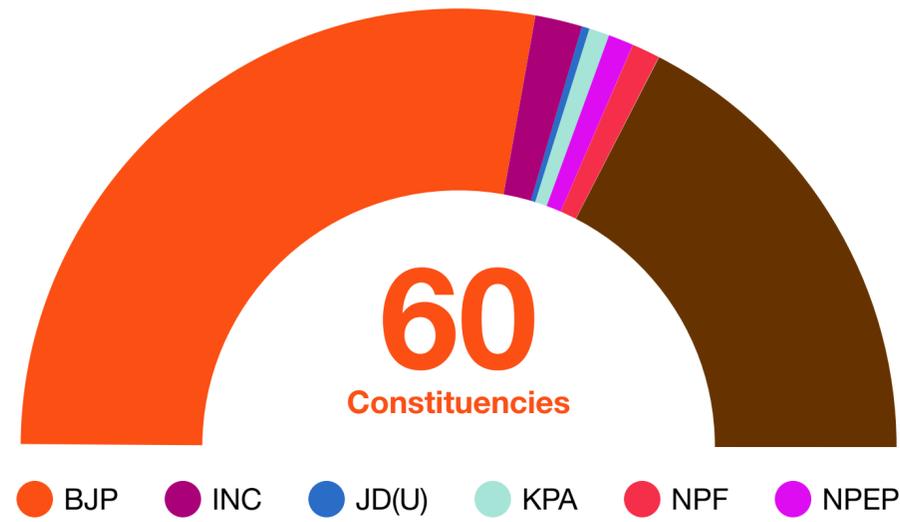
UTTARAKHAND



● BJP ● BSP ● INC ● JDL

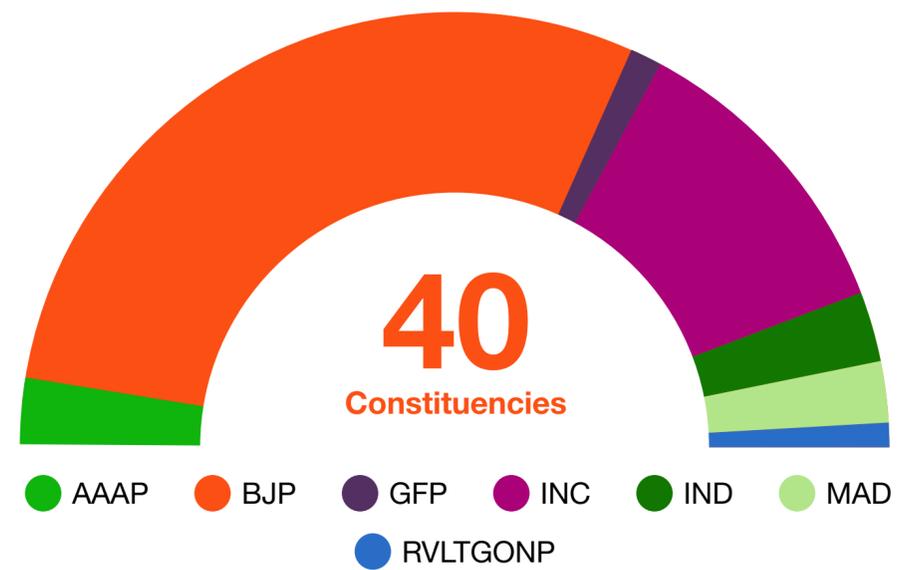
Party	Won
Bahujan Samaj Party	2
Bharatiya Janata Party	47
Independent	2
Indian National Congress	19
Total	70

MANIPUR



Party	Won
Bharatiya Janata Party	32
Independent	3
Indian National Congress	5
Janata Dal (United)	6
Kuki People's Alliance	2
Naga Peoples Front	5
National People's Party	7
Total	60

GOA



Party	Won
Aam Aadmi Party	2
Bharatiya Janata Party	20
Goa Forward Party	1
Independent	3
Indian National Congress	11
Maharashtrawadi Gomantak	2
Revolutionary Goans Party	1
Total	40



OVERVIEW

The results of assembly elections in five states—Uttar Pradesh, Punjab, Uttarakhand, Goa and Manipur—are out after over two months of fierce campaigning. The mandate of Uttar Pradesh (UP)—the most sought after and keenly watched—has gone in favour of the Bharatiya Janata Party (BJP) government. The party registered a comprehensive victory with 255 seats in UP and has become the first party since 1985 to beat the incumbency and return to power with an absolute majority. The results are almost on the lines of predictions made in the exit polls. It's expected that Chief Minister Yogi Adityanath will continue to be at the helm of affairs and will take the oath of office for the second term in the next few days.

The BJP 2.0 government's agenda in the state is expected to be development-oriented and is most likely to showcase an "Uttar Pradesh model of governance" to the world. This is expected to be driven by several large industrial projects as well as big investments in start-ups, media and entertainment, and defence sectors. The BJP 2.0 government is also expected to continue its special focus on farm-centric policies. The party has already outlined these likely steps in its manifesto "Lok Kalyan Sankalp Patra" and during the election campaigning, it kept on projecting about "double-engine government", implying that the development of the state takes the priority over all other issues due to the Prime Minister of the country and the Chief Minister of UP belonging to the same party.

The "Uttar Pradesh model of governance" of the BJP 2.0 government may shower special attention on Purvanchal (the Eastern UP), Bundelkhand and Awadh regions of the state in the coming years as the party secured thumping victories in most of the assembly constituencies of these regions. The areas are lesser developed compared to capital Lucknow or major industrial areas like Kanpur, Noida, Ghaziabad, Meerut, etc. and party supporters expect payback from their government to maintain their high morale. The BJP government is also expected to invest hugely in developing social capital by continuing various welfare policies to maintain the confidence of women and girls, which have emerged as a separate

voting bloc for the party. Put together, the affairs in UP will be keenly watched and the state will continue to remain the centre of attention for the BJP in the coming years and will play a huge role in parliamentary elections in 2024 because it sends 80 members to the Lok Sabha.

In Punjab, Arvind Kejriwal-led Aam Aadmi Party (AAP) has secured a thumping victory by winning 92 seats, which is more than 3/4th of the total 117 assembly seats and Mr. Bhagwant Mann is expected to be sworn in as the new Chief Minister of the state. The Aam Aadmi Party seems to have benefitted from the high anti-incumbency factor against the outgoing Congress government and farmer agitation against the Centre's now repealed farm laws. The state had gone to the polls on February 20 for 117 assembly constituencies across 23 districts and the new government's focus is expected to be replicating its Delhi model of governance, where the focus is on providing better social infrastructure to the public. This includes relying more on government facilities and improving their conditions as well as providing better health and education infrastructure facilities, subsidised electricity supplies and poverty elimination. This historic victory has finally shaken off the tag of "Delhi-centric" party from the Aam Aadmi Party and in the longer run, the party may project itself as the most suitable competitor to the BJP at the national level.

Uttarakhand and Manipur are the other two states BJP has managed to retain power in. In both the states, BJP has won an absolute majority with 47 seats in Uttarakhand and 32 seats in Manipur. Uttarakhand was a crucial cog in the wheel in BJP's scheme of things due to the anti-incumbency factor as no party has returned to power since the formation of the state in 2000. The challenge had led to the BJP changing its Chief Ministers three times in the state in the last five years. The election results show that the party was successful in winning voters' confidence and its issues like national security, army welfare, and religious tourism were able to garner support in the hilly state. The Manipur elections were also a test of the leadership of

Chief Minister N Biren Singh, who was fighting on the plank of peace and good governance vis a vis the regular bandhs and blockades during the opposition's regime earlier. With the centre's clear focus on the North East, Manipur is bound to get a lot of attention in terms of investment, good governance, welfare activities and development projects, including infrastructure, besides an overall improvement in law and order.

In the state of Goa, BJP yet again has emerged as the winner by achieving 20 assembly seats out of 40 and is on its course to form the government with the support of 3 Independents and MGP (Maharashtrawadi Gomantak Party). Under the BJP 2.0 government, the state's economy has grown faster when compared to its first tenure, even after suffering a major dip in FY20. The state had also seen a dip in the overall rate of crime. The economy of the state is heavily dependent on tourism and mining and the two sectors are expected to remain the most focused areas of governance. Besides, the efforts could also be on maintaining the law and order and the safety of people as well as good health infrastructure and promoting an investment-friendly business climate in the state.

The assembly election results indicate that the BJP, which is also in power at the Centre, stands firm and strong, compared to all its competitors and will continue to dominate the national agenda and narrative in the run-up to the general election 2024.

WHAT YOU NEED TO KNOW?

Bhartiya Janta Party Manifesto for Uttar Pradesh

Investment worth ₹25,000 crore in setting up a strong network of cold chain and warehouses for grading of horticultural crops so that farmers get remunerative prices.	●
It plans to build a ₹10,000 crore Film City in Noida.	●
Doubling the amount of the Pradhan Mantri Kisan Samman Nidhi (PMKISAN) scheme for landless farmers.	●
Giving two free cylinders every year to the consumers at the festival of Holi and Diwali under the Ujjwala Yojna. The scheme provides a free gas connection to households and the cost of the same will be covered by the state government.	●
Health insurance to the Anganwadi workers under the Ayushman Bharat scheme.	●
Increase in hiring 6,000 doctors and 10,000 paramedic experts. The seats in medical colleges will also be doubled.	●
The pension for old people will be increased to ₹1,500 per month.	●

Aam Aadmi Party Manifesto for Punjab

Private sector to be encouraged in the public health sector.	●
Punjab Launch Pad Hubs (Incubators) in 10 major cities of Punjab. Incubation Centres called Punjab Launch Pads will be set up in 10 major cities of Punjab namely Mohali, Batala, Pathankot, Ludhiana, Patiala, Jalandhar, Bathinda, Hoshiarpur, Ferozepur and Amritsar.	●
The anticorruption investigation and enforcement wings of the government including the Lokayukta shall be given greater powers and autonomy.	●
Setting up of 147 Entrepreneurship and Skilling Centers, in each block. Special emphasis will be on Agriculture and Allied industries i.e. Food Processing, Dairy Farming, Horticulture, Maize & Cotton related Industries etc.	●
33% reservation for women in jobs. Women employees will preferably be posted in their home district.	●
Creation of Micro Finance Industry. The Party plans to create micro finance industry. Further, State Finance Corporation will be revived and through appropriate regulatory framework an enabling environment for private micro finance players shall be created.	●

Bhartiya Janta Party Manifesto for Uttarakhand

Households will be given 3 cylinders free of cost in a year.	●
The party plans to make Haridwar the world capital of Yoga.	●
It promises 50,000 government jobs to the youth.	●
Both Centre and state will provide ₹6,000 each towards Prime Minister Kisan Samman Nidhi scheme that will extend a benefit of ₹12,000 fund transfer to every farmer's bank account.	●
It plans a multi-skill development centre for youth.	●
Development of every village under Smart Village Program.	●

Implementation Possibility

● High ● Moderate ● Low



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