



India

MODI TO CAPITALISE ON CONFLICT RISK

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The Indian air strike on an alleged jihadist camp in Pakistan in retaliation for a terrorist attack that killed 46 security personnel produced dramatic air battles between the two countries, and resulted in the shooting down and capture of an Indian pilot. Tensions subsided after Pakistan returned the pilot to India. We look here at the prospect for renewed tensions as well as their likely impact on the April-May 2019 general election.

- Tensions could re-escalate in case of another terror attack with Modi committed to a strong retaliatory stance.
- A nationalist outpouring following the attacks may have halted a year long slide in support for the ruling Bharatiya Janata Party (BJP).
- The government narrative of decisive leadership just received a boost versus the opposition narrative of economic distress.
- The BJP's strengths in resources, organisation and campaigning place the party at an advantage in the short term.

Strategic shift raises conflict risk

We highlighted an Indian military attack on Pakistan as the main risk to our baseline scenario of a close election fight in April-May 2019 (see our 18 February note [The return of coalition politics](#)). And indeed, India retaliated to the 14 February suicide car bombing in Kashmir that killed 46 Indian security personnel with a 26 February air strike on an alleged training facility in Balakot, Pakistan, of the Jaish-e-Muhammad, the group responsible for the attack. The Jaish is widely believed to have close ties with, and the protection of, the Pakistan Army. This was the first time since the 1971 war with Pakistan that Indian warplanes had attacked Pakistani territory, as opposed to disputed territory.

Pakistan responded the next day by sending warplanes into Indian airspace, dropping bombs near Indian military facilities and shooting down over Pakistani airspace an Indian fighter jet that had given chase. The Indian pilot was held captive for two days before being returned to India on 1 March as a conciliatory gesture. Tensions decreased thereafter, with both sides having made their points.

Tensions could flare up if there is another terror attack

There is no doubt that India's air attack has redrawn longstanding "red lines" that held it back in the past, even though there are many unanswered questions about what damage the Indian warplanes inflicted on the Jaish camp and the fate of a Pakistani fighter the Indian Air Force claimed to have shot down.

India has faced much bigger terror attacks in the past without directly attacking Pakistan.

The risk of nuclear escalation played a part in previous decisions not to escalate. However, hawks in India have long chafed that Pakistani "nuclear blackmail" has permitted the latter to sponsor cross-border attacks by its jihadist proxies.

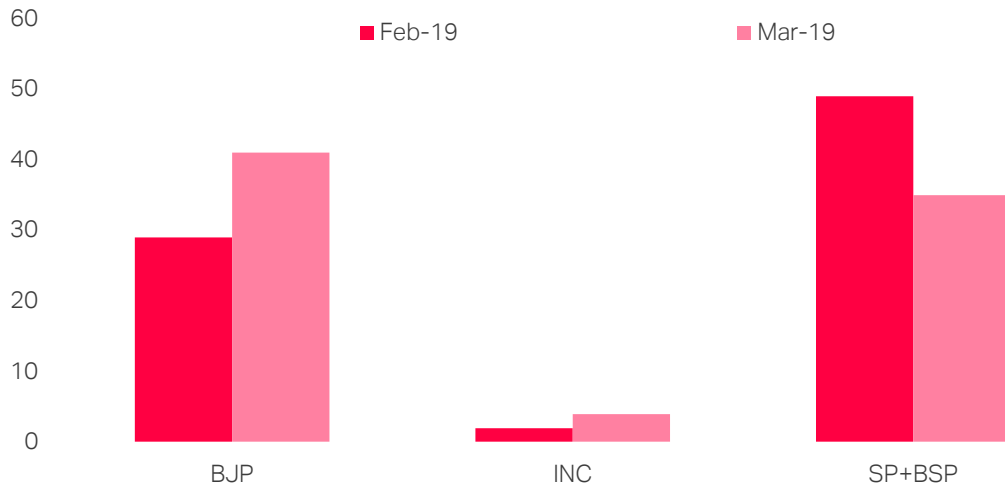
Prime Minister Narendra Modi's decision replaces a longstanding policy of restraint with an aggressive stance that will be difficult to reverse. Whether or not Modi is re-elected, a future government will be under tremendous pressure to respond militarily to any major terror attack linked to Pakistan-based groups. In 2016, Modi sent in special forces to five locations across the Line of Control (LoC - the line separating Indian- and Pakistan-administered Kashmir) in response to an attack on an army camp in Kashmir that had killed 17 soldiers. Previous governments had done similar operations, but on a smaller scale and without public acknowledgment, in order to send a private message to Pakistan. Modi has transformed these attacks into a public spectacle, tying the hands of a future government to some extent. In this sense, the risk of conflict escalation between India and Pakistan has risen materially.

Politics of nationalism

The reaction at home has been strongly supportive of Modi and - as we had predicted in our previous note - produced a nationalist outpouring. More importantly, Modi and the Bharatiya Janata Party (BJP) have not shied away from taking credit, castigating opposition parties for being insufficiently patriotic or from mocking previous governments for lacking the courage to take on Pakistan in this manner.

Preliminary evidence suggests that Modi has gained from positive sentiment following the air strikes. An India TV-CNX opinion poll conducted 1-4 March projected that the BJP would win 41 of 80 seats in India's largest state Uttar Pradesh, down from 73 in 2014 but up from the 29 that India TV-CNX previously projected for the party.

Chart 1: Projected seats in Uttar Pradesh in 2019 general election



Source: India TV-CNX opinion polls

However, the historical record is mixed as to whether perceived military triumphs translate into votes. Consider these examples:

- The BJP won the same number of seats after the 1999 Kargil war as it had the year before.** India and Pakistan waged a limited war in May-July 1999 after India discovered Pakistani troops occupying mountain ridges in Kargil along the LoC. India succeeded in ejecting the intruders after several weeks of gruelling high-altitude infantry combat. Kargil was India's first televised war, with frontline war reporting beamed directly into people's homes, and strongly whipped up nationalist sentiment. The war had begun shortly after the BJP-led government lost its majority in April 1999. Yet in the following October 1999 election, the BJP won the same number of seats as it had won in February 1998 - 182 of 543. Losses in states like Uttar Pradesh and Karnataka were offset by gains in Maharashtra and Rajasthan. The Indian National Congress's tally fell in comparison with 1998 mainly because several senior leaders left the party in protest against the Congress President Sonia Gandhi's foreign origins, and because a regional party in Andhra Pradesh made gains at the INC's expense, and subsequently allied with the BJP-led coalition. Local factors rather than nationalism determined these shifts.
- BJP allegations of INC weakness after the 2008 Mumbai attack had no political impact.** The BJP strongly criticised the then ruling INC-led government for its failure to prevent the November 2008 Mumbai terror attack or to respond to it militarily. The attacks were covered on television in real time coverage and TV opinion was hawkish and nationalistic. However the INC won the Delhi state election - Delhi being an urban, high media exposure state - held only two days after the attack. The charge of being soft on national security had no discernible impact on the April-May 2009 general election in which the INC-led coalition was decisively re-elected.
- The "surgical strikes" of 2016 probably did have an electoral impact in Uttar Pradesh.** The Indian Army made some five ground incursions across the LoC in September 2016 in

response to a terror attack in which 17 troops were killed. The resultant outpouring of nationalist sentiment broke the momentum of an INC campaign in the state aimed at farmers. But as we wrote in our 8 Mar 2017 note [On the road in Uttar Pradesh: Modi's BJP set to win key election](#), a much bigger contribution was made by demonetisation and its promise at the time of ending corruption. However it's difficult to quantify the impact of national pride in the BJP's subsequent electoral sweep in the state election.

It would appear that there is no simple, linear relationship between military action and voting behaviour. The difference this time is that the military clashes have occurred less than two months before voting is scheduled to begin in the general election, which arguably makes them more salient to voters. And Modi and the BJP are making them a central issue on the campaign trail, and invoking nationalist sentiment by showing that they are taking a hard stance against Pakistan.

Conclusion

The extent to which the BJP succeeds depends both on whether terror attacks and retaliation recur during the election campaign, and on how successful the opposition is on taking the conversation back to the bread-and-butter issues. Growing signs of economic deceleration, such as the slowing of Oct-Dec 2018 GDP growth to 6.6% yoy (from 7% in Oct-Dec 2017), received cursory media attention following the India-Pakistan clash. The BJP's advantages in resources, organisation and campaigning will also play a role, making it an uphill challenge for the opposition at this point.

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