

Regionalism, Welfare Populism, and Retrospective Accountability: An Integrated Analysis of Electoral Change in Telangana, 2014-2023

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Abstract:

This paper examines why the Telangana Rashtra Samithi (TRS, later renamed Bharat Rashtra Samithi, BRS) won Telangana's first two state legislative assembly elections (2014 and 2018) by wide margins, and why the Indian National Congress unseated it in 2023 despite a vote-share gap of less than two percentage points between the two parties. Rather than treating these three elections as a sequence of discrete events, the paper develops an integrated analytical framework that combines three literatures usually treated separately in the study of Indian subnational politics: theories of regionalism and subnational party formation, theories of welfare programmes and clientelist accountability, and theories of retrospective voting and manifesto-based issue ownership. Using Election Commission of India results and CSDS-Lokniti pre- and post-poll survey data for all three elections, the paper shows that each election was won on a different combination of these three dimensions: 2014 on regional-identity legitimacy, 2018 on welfare-delivery performance legitimacy, and 2023 on retrospective governance accountability. The paper argues that this sequencing is not incidental but theoretically predictable: regional parties that convert movement politics into governing power must progressively substitute identity-based legitimacy with delivery-based legitimacy, and once in office become subject to the same retrospective accountability dynamics documented in mature democracies. The paper concludes by proposing a three-stage model of regional-party electoral consolidation and decline that is intended to travel beyond the Telangana case.

Keywords: Regionalism; Welfare Populism; Subnational Politics; Telangana; Electoral Accountability.

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I. Introduction:

The winning of elections is the central objective of every political party, but the coalition of appeals through which a party wins rarely stays constant across time. This is especially true of parties born out of regional or ethnic movements, which typically face a structural transition: the appeals that mobilise a movement to demand statehood, autonomy, or recognition are not necessarily the appeals that sustain a governing party once that demand has been met (Ziegfeld, 2016; Chandra, 2004). Telangana, India's twenty-ninth state, created on 2nd June 2014 after a decades-long statehood movement, offers an unusually clean natural experiment in which to study this transition, because the party that led the movement, the Telangana Rashtra Samithi (TRS), went on to govern the new state for two consecutive terms before losing power to the Indian National Congress (INC) in 2023.

India's multi-party system, comprising eight recognised national parties, twenty-seven state parties, and more than 2,700 registered unrecognised parties (Election Commission of India, 2021), makes the country a productive setting for comparative research on regional party formation and consolidation (Chhibber & Kollman, 2004; Ziegfeld, 2016). The TRS was founded in 2001 on the explicit demand for a separate Telangana state, drawing on decades of regional grievance over water allocation, public employment, and budgetary neglect within the undivided state of Andhra Pradesh (Srinivasulu, 2018). Both major national parties, the INC and the Bharatiya Janata Party (BJP), ultimately supported statehood; it was the Congress-led United Progressive Alliance (UPA) government that introduced and passed the Andhra Pradesh Reorganisation Act, 2014, with BJP support (Government of India, 2014). Yet neither national party translated this legislative role into electoral credit: in the very first assembly election held in the new state, the TRS convinced voters that statehood had been won through the region's own sacrifice and struggle, not through the concession of Delhi-based national parties, and won a decisive majority.

This paper asks why the TRS/BRS was able to convert regional-movement credibility into two consecutive electoral victories, and why that advantage proved insufficient to prevent defeat in a third election in

which the party's own vote share fell only marginally. Existing accounts of the Telangana case, and of Indian regional-party politics more generally, tend to explain each election in isolation, drawing on whichever single factor, regional sentiment, welfare delivery, or anti-incumbency, appears most salient to that particular contest (Vaageeshan & Chitrapu, 2021; Rao & Harinath, 2024). This paper instead argues that the three elections must be read together, as sequential stages in a single, theoretically predictable process through which regional parties substitute one basis of electoral legitimacy for another as they move from movement politics to governing politics, and eventually become exposed to the ordinary retrospective accountability that governs incumbents everywhere (Fiorina, 1981; Healy & Malhotra, 2013).

The remainder of the paper is organised as follows. Section 2 develops an integrated theoretical framework drawing on the literatures on regionalism and subnational party formation, welfare programmes and clientelist accountability, and retrospective voting and issue ownership, and proposes a three-stage model of regional-party electoral consolidation that structures the analysis that follows. Section 3 states the paper's research questions and objectives. Section 4 describes the methodology and data analysis. Section 5 provides the historical and political context necessary to interpret the data. Section 6 presents the electoral and survey data for 2014, 2018, and 2023 and interprets each election through the theoretical lens most applicable to it. Section 7 discusses the findings and returns to the three-stage model proposed. Section 8 concludes, states the paper's contribution, and discusses its limitations.

II. Theoretical Framework and Literature Review:

The relationship between welfare programmes, regionalism, public policy, and electoral success is a well-established subject of political science research, particularly in developing democracies such as India. Existing scholarship, however, tends to treat regionalism, welfare politics, and retrospective accountability as competing rather than sequential explanations. This section reviews each literature in turn and then proposes an integrated framework that treats them as complementary stages of a single underlying process.

2.1. Regionalism, Federalism, and Subnational Party Formation:

Regionalism refers to political mobilisation based on regional identity, language, culture, economic grievance, or demands for autonomy, and has shaped Indian politics since independence (Weiner, 1978; Brass, 1994). Riker's (1964) classical theory of federalism argues that federal structures emerge and persist where central elites find it substitute to bargain with regional elites rather than absorb them, a bargaining logic clearly visible in the eventual, if delayed, concession of Telangana statehood by the national UPA government. Tillin's (2013) study of new state formation in India after 1990 similarly shows that successful statehood movements combine sustained regional grievance with a credible regional political vehicle capable of aggregating that grievance into electoral and parliamentary pressure. Chhibber and Kollman's (2004) comparative account of party-system formation under federalism explains why such vehicles, once created, tend to persist: state-level parties centre their organisational and electoral strategies on the powers genuinely devolved to the state level, giving them a durable institutional niche that national parties structurally struggle to contest.

A separate strand of this literature questions whether regional identity alone can sustain electoral success once a movement's founding demand has been met. Ziegfeld's (2016) large-scale study of Indian regional parties argues, against the conventional wisdom that regional parties succeed primarily by harnessing popular grievance, that their electoral durability instead depends on their capacity to offer politicians a credible route to office through clientelist exchange and coalition bargaining, meaning that regional identity functions mainly as an initial coordination device rather than a renewable electoral resource. Chandra's (2004) study of ethnic party success reaches a related conclusion: ethnic or regional parties that wish to remain competitive after their founding moment must build patronage networks capable of distributing material benefits, because identity appeals alone cannot indefinitely outcompete rival parties offering comparable identity claims plus material benefits. Together, this literature implies a testable proposition: a regional party's electoral coalition should be expected to shift, over successive elections, from identity-based to material- and performance-based legitimacy, a shift examined empirically in Section 6.

2.2. Welfare Programmes, Clientelism, and Electoral Accountability:

The connection between welfare programmes and political success has been extensively examined in the literature on distributive politics and welfare democracy. Kitschelt and Wilkinson's (2007) comparative framework distinguishes clientelist accountability, in which parties exchange targeted material benefits for votes, from programmatic accountability, in which parties compete on broad policy platforms; they show that Indian state politics has historically combined both logics, with welfare schemes often serving simultaneously as genuine public policy and as a targeted electoral instrument. Thachil's (2014) study of how parties without a traditional social base-built welfare-linked support among the rural poor demonstrates that direct, visible, and personally attributable welfare delivery can substitute for an inherited social coalition, a dynamic with clear relevance to a

newly formed regional party seeking to build a durable electoral base from a movement coalition. Kruks-Wisner's (2018) ethnographic account of rural claim-making in India further shows that citizens actively learn to associate specific welfare entitlements with the party or leader they perceive as responsible for delivering them, reinforcing the electoral salience of scheme branding documented in this paper's data on Rythu Bandhu and Aasara Pensions.

Wood and Gough's (2006) comparative welfare-regime framework classifies countries such as India as operating an 'informal security regime' rather than a Western-style welfare state, in which family, community, and clientelist political relationships substitute for comprehensive state provision, a classification directly relevant to understanding why individually branded, personally attributable schemes such as Rythu Bandhu proved more electorally potent than generalised public-service improvement. Chhibber and Nooruddin's (2004) cross-state study finds that voters reward incumbent governments more consistently when welfare benefits are visible, individually attributable, and effectively implemented, rather than merely announced, finding this paper's survey evidence on scheme awareness and benefit receipt (Section 6.2) directly speaks to. Suri and Kailash's (2016) review of Indian election studies cautions against dismissing welfare-oriented politics as mere populism, arguing that voters' welfare demands reflect genuine and largely rational assessments of which party is best positioned to meet their immediate material needs, a normative position consistent with Dreze and Sen's (2013) broader argument that social protection, healthcare, and income support are necessary instruments of redistributive democracy rather than short-termist vote-buying.

2.3. Public Policy, Governance Performance, and Retrospective Accountability:

A distinct literature explains electoral outcomes through voters' retrospective evaluation of incumbent performance rather than through either identity or targeted welfare exchange. Downs (1957) models' elections as competitions between policy platforms in which parties seek to maximise votes by locating themselves close to the preferences of the median voter. Key (1966) & Fiorina (1981) reformulate this insight as a theory of retrospective voting, arguing that voters use an incumbent's demonstrated performance, rather than promises about the future, as the primary basis for their vote choice, because performance is easier to verify than promises. Healy & Malhotra's (2013) systematic review of the retrospective-voting literature finds robust cross-national evidence that voters reward or punish incumbents for outcomes within their control, but also that voters respond disproportionately to short-term and highly salient conditions immediately preceding an election, a finding with direct relevance to the electorally proximate salience of examination-paper leaks and recruitment delays documented in this paper's account of the 2023 election (Section 6.3). Achen and Bartels (2016) offer an important qualification: retrospective judgement is frequently 'blind', in that voters punish incumbents for conditions outside their control or attribute credit and blame using heuristics that have little to do with careful policy evaluation; this caution is relevant to interpreting survey-based attributions of credit for Telangana's statehood (Table 2) as much as to interpreting anti-incumbency in 2023.

Bardhan's (2002) analysis of decentralised governance in India argues that development performance, roads, irrigation, electricity, and drinking water among them, has become an increasingly salient electoral criterion in Indian states, particularly among rural producers and the middle class, a claim directly testable against this paper's CSDS survey data on perceived service improvement (Table 5). Rudolph and Rudolph's (1987) classic account of the Indian developmental state similarly argues that citizens increasingly evaluate state governments on demonstrated governance capacity rather than loyalty alone, a shift consistent with the growing salience of manifesto-based policy competition documented in Section 6.3.

2.4. Party Manifestos and Issue Ownership:

Manifestos constitute one of the principal instruments through which political parties communicate policy priorities to citizens and through which researchers can systematically compare rival policy platforms. The Comparative Manifestos Project methodology developed by Budge et al. (2001) and extended by Klingemann et al. (2006) treats manifestos as measurable evidence of programmatic competition rather than mere campaign rhetoric, an approach this paper applies qualitatively to the 2023 Congress and BRS manifestos in Section 6.3. Petrocik's (1996) issue-ownership theory argues that parties succeed less by persuading voters on a shared set of issues than by convincing voters that they are more competent than their rivals on the issues voters already consider most important, implying that a party's electoral strategy should concentrate on issues on which it already holds a credibility advantage rather than contesting its rival's strongest ground. In public administration, scholars such as Osborne (2006) and Denhardt & Denhardt (2015) argue that citizens increasingly evaluate governments based on the quality, accessibility, transparency, and accountability of public services, a normative and empirical claim this paper draws on when interpreting the governance-accountability dimension of the Congress campaign in 2023.

2.5. Welfare Populism: Debates and Counter-Arguments:

Some scholars view welfare-centred electoral competition critically. Kitschelt and Wilkinson (2007) note that clientelist welfare politics can prioritise short-term electoral gain over structural reform, while critics of 'freebie culture' in Indian state politics argue that competitive, personality-branded welfare promises may weaken long-term fiscal sustainability. Others counter that this critique understates the redistributive value of welfare politics in a highly unequal society. Dreze & Sen (2013) argue that social protection, healthcare, education, and income support meaningfully improve human development and democratic inclusion regardless of their electoral motivation, while Suri and Kailash (2016) caution that dismissing welfare demand as populism risks delegitimizing what is, for most Indian voters, a rational and largely accurate assessment of which party is best positioned to meet immediate material needs. This paper does not attempt to adjudicate this normative debate, but treats both positions as relevant to interpreting why welfare delivery proved electorally decisive in 2018 even though it later proved insufficient, on its own, to prevent defeat in 2023.

2.6. An Integrated Analytical Framework: A Three-Stage Model of Regional-Party Consolidation:

Read together, the literatures reviewed above suggest that the three dimensions typically treated as competing explanations for regional electoral success, regional identity legitimacy, welfare-delivery performance legitimacy, and governance accountability, are better understood as sequential stages through which a regional movement party is likely to pass as it consolidates power. In Stage 1, at the point of a movement's founding electoral test, identity-based legitimacy dominates: voters credit the party most closely associated with securing the movement's core demand, largely independent of that party's administrative record, because no such record yet exists (Ziegfeld, 2016; Chandra, 2004). In Stage 2, once in office, the party must convert movement credibility into administrative credibility, and welfare-delivery performance legitimacy becomes the dominant basis of support, consistent with Chhibber & Nooruddin's (2004) and Thachil's (2014) arguments that visible, attributable material delivery is what sustains a governing coalition built initially on identity. In Stage 3, as the party's administrative record accumulates and its founding identity claim recedes in salience relative to newer grievances, ordinary retrospective accountability dynamics documented in mature democracies (Fiorina, 1981; Healy & Malhotra, 2013) come to dominate, and the party becomes vulnerable to defeat on governance grounds even where its identity credentials remain intact. Section 6 tests this three-stage model against the 2014, 2018, and 2023 Telangana elections in turn.

III. Research Questions and Objectives:

This paper addresses the following research question: Why did the TRS/BRS win Telangana's first two legislative assembly elections (2014, 2018), and why did the Indian National Congress defeat it in the third (2023), given that the aggregate vote-share shift between the winning and losing parties in 2023 was less than two percentage points?

Building on this question, the paper pursues three specific objectives:

- To assess the relative contribution of regional-identity sentiment to the TRS's founding electoral victory in 2014.
- To evaluate the extent to which targeted welfare programmes explain the TRS's re-election in 2018.
- To determine whether the Congress victory in 2023 is better explained by retrospective anti-incumbency and manifesto-based issue ownership than by a reversal of regional or welfare sentiment.

IV. Data and Methods:

This paper uses a mixed-methods, longitudinal case-study design, combining official electoral results with secondary survey data across three consecutive Telangana Legislative Assembly elections (2014, 2018, 2023). Party-wise seats contested, seats won, and vote-share data are drawn from the Election Commission of India's statistical reports for each election. Survey data are drawn from the Centre for the Study of Developing Societies (CSDS)–Lokniti National Election Studies pre-poll and post-poll surveys, which use stratified multi-stage random sampling of the state's assembly segments. The 2014 pre-poll survey fieldwork was conducted between 18 and 23 March 2014 across 23 parliamentary constituencies (sample size = 1,308), supplemented by an earlier February 2014 survey (sample size = 1,458). The 2018 pre-poll survey was conducted across all 32 assembly segments included in the CSDS sampling frame for Telangana, with a total sample size of 2,901. Party manifesto documents for the 2023 election were analysed qualitatively, following the broad approach of the Comparative Manifestos Project (Budge et al., 2001; Klingemann et al., 2006), to compare the policy commitments of the two principal contenders.

Descriptive statistical analysis of the electoral and survey data was conducted using standard office spreadsheet software. Because this paper relies on secondary survey and administrative data rather than an original survey instrument, it cannot establish individual-level causal identification between any single variable and vote choice; instead, it triangulates across official results, survey cross-tabulations, and documentary evidence

(manifestos, scheme guidelines, contemporary news reporting) to build a theoretically structured, historically grounded interpretation of aggregate outcomes. This limitation, and its implications for the generalizability of the paper's three-stage model, is discussed further in Section 8.

V. Historical and Political Context in Telangana:

5.1. The Indian National Congress role in Telangana:

The Indian National Congress (INC) played a central role in the political development of the Telangana region from the pre-independence period onward. During the movement against the princely rule of the Nizam of Hyderabad, Congress leaders advocated democratic governance, civil liberties, and the integration of Hyderabad State into the Indian Union. Following Hyderabad's accession to India in 1948, Congress emerged as the dominant political party in the region. After the 1956 formation of Andhra Pradesh, merging the Telangana region with the Andhra State under the States Reorganisation Act, Congress governed the undivided state for most of the post-independence period and introduced numerous development and welfare programmes (Brass, 1994).

The demand for a separate Telangana state re-emerged strongly during the 2000s. Although Congress initially adopted a cautious approach, the United Progressive Alliance (UPA) government ultimately approved the creation of Telangana. The Andhra Pradesh Reorganisation Act, 2014, enacted by Parliament, formally created Telangana as India's twenty-ninth state on 2 June 2014 (Government of India, 2014). Despite having introduced the legislation that created the new state, Congress failed to convert this legislative role into electoral credit in the first Telangana assembly election, a puzzle addressed directly in Section 6.1.

5.2. Formation and Rise of the Telangana Rashtra Samithi/ Bharatiya Rashtra Samithi:

Kalvakuntla Chandrashekar Rao (KCR), then Deputy Speaker of the undivided Andhra Pradesh Legislative Assembly, began organising around the Telangana statehood demand in early 2000. After extended discussions with Telangana intellectuals and civil society figures, KCR resigned his Deputy Speaker and MLA posts and launched the Telangana Rashtra Samithi on 27 April 2001. The party entered mainstream electoral politics through local body elections in 2004 and, contesting in alliance with Congress, won 26 assembly seats and 4 Lok Sabha seats; it was subsequently allotted two central and six state-level ministerial berths. When the ruling UPA government did not move to create a separate state, TRS's elected representatives resigned their posts en masse and recontested, winning only 2 Lok Sabha and 8 assembly seats in the resulting by-elections. In 2009, contesting as part of the Mahakutami alliance with the Telugu Desam Party (TDP) and the Communist parties, the TRS won 10 assembly seats and 2 Lok Sabha seats. Following the creation of Telangana in 2014, the TRS won 63 assembly seats and 11 Lok Sabha seats contesting independently; in the 2018 assembly election it increased this to 88 assembly seats and, in the concurrent 2019 general election, 12 Lok Sabha seats.

5.3. Sustainability of Bharatiya Janata Party in Telangana:

2014 Lok Sabha. In the first general election after Telangana became a separate state, the BJP won just 1 of the 17 seats, with a vote share of around 8.5%. It contested in alliance with the TDP and its strength was concentrated in Hyderabad. 2014 Assembly. In the state's first assembly election, the BJP won 5 of 119 seats with a vote share of about 7%, again in alliance with the TDP. 2018 Assembly. This was the party's low point. Fighting alone after the alliance with the TDP ended, the BJP held on to just 1 of 119 seats, Raja Singh's Goshamahall, and its vote share stayed at roughly 7%. It lost its deposit in most of the constituencies it contested.

2019 Lok Sabha, only months later, the BJP's fortunes reversed. It won 4 of 17 seats, Adilabad, Nizamabad, Karimnagar and Secunderabad, and nearly tripled its vote share to about 19.5%. It also opened up north Telangana as the party's new base, beyond Hyderabad. This was the real breakthrough of the decade. 2023 Assembly. The BJP won 8 of 119 seats with a vote share of about 14%, its best assembly result in the state, double its 2014 tally and well above 2018. Its wins were concentrated in north Telangana plus Goshamahall and Kamareddy, where its candidate defeated both K. Chandrashekar Rao and Revanth Reddy. Even so, it was far from power. The Congress won the election and the BRS went into opposition. Many observers felt the BJP had lost momentum in the run-up, and that a perception of it going soft on the BRS helped the Congress consolidate the anti-BRS vote.

VI. Findings: Linking Electoral Data to Theory:

6.1. The 2014 Election: Regionalism as the Dominant Cleavage:

Table 1 reports the full party-wise results of the 2014 Telangana Legislative Assembly election, the first held in the newly created state. The TRS contested all 119 assembly seats and won 63, an increase of 53 seats over its 2009 tally, with a vote share of 34.04 per cent, a gain of 24.07 percentage points. Congress, by contrast, was the largest net loser: contesting 113 seats, it won only 21, with its vote share falling 8.34 percentage points to 25.02 per cent, despite having authored the statehood legislation. The TDP-BJP alliance won 20 seats; TDP's vote share fell 6.26 points while its ally BJP gained 1.72 points.

Table 1. 2014 Assembly Election All-Party Performance (Telangana):

Party	Seats Contested	Seats Won	Change from 2009	Vote (%)	Change from 2009 (%)	Vote (%) in Seats Contested
TDP + BJP	117	20	-21	21.58	-4.55	-
TDP	72	15	-24	14.55	-6.26	23.67
BJP	45	5	+3	7.03	+1.72	19.16
TRS	119	63	+53	34.04	+24.07	34.04
INC	113	21	-29	25.02	-8.34	26.23
MIM	20	7	0	3.71	+1.66	20.87
YSRCP	92	3	+3	3.36	+3.36	4.37
BSP	102	2	+2	1.35	+0.16	1.56
NOTA	119	0	0	0.78	+0.78	-
Other Parties	1,106	3	8	10.13	17.15	-

Note: The effective number of parties by vote share is 4.583; by seats, 3.736. 'Other Parties' aggregates JASPA, LSP, PPOI, AAP, YSRPP, MASP, SDLPI, MBT, YTP, FBL, ICSP, RPI(ATHA), RPS, NCP, RLD, RPK, WPOI, ANC, SDPI, TECPI, MCPI(U), BCUF, SP, TPS, DABP, JAP, HJP, PJDL, CPIML(L), SHS, NBNP, BMUP, LJNSP, RDHP, TLP, ARPS, JD(U), RPI(K)/RPI(AMB), GGP, RJD, IUML, SUCI, JD(S), BJS, GAAP, JNP, RSP, RPI, and other registered parties and independents. Source: Election Commission of India, compiled by the CSDS Data Unit.

Two further CSDS survey items allow this aggregate pattern to be interpreted through the regionalism literature reviewed in Section 2.1. Table 2 reports responses to the CSDS pre-poll question asking voters whom they credited for the decision to create Telangana. Chandrashekar Rao and the TRS received the largest single share of credit (37 per cent), more than the credit given to the Congress leadership in Delhi (21 per cent) and dramatically more than that given to state-level Congress leaders (3 per cent).

Table 2. CSDS survey question: 'Who should get credit for the decision to create a separate state of Telangana?'

No.	Response	Share of Respondents (%)
1	Chandrashekar Rao / TRS	37
2	Congress leadership in Delhi	21
3	Central government	6
4	Congress leaders of the state	3
5	BJP	2
6	All parties	3
7	Others	5
8	Cannot say	23

Source: CSDS-Lokniti pre-poll survey, Andhra Pradesh, 2014.

This asymmetry, TRS credited with statehood at more than ten times the rate of state-level Congress despite Congress having formally legislated it, is direct survey evidence for the identity-legitimacy mechanism proposed in Section 2.1:

voters attributed credit for the movement's outcome to the party most closely identified with the movement itself, largely independent of which party held formal legislative authorship (Ziegfeld, 2016; Chandra, 2004). This pattern is also consistent with Achen and Bartels's (2016) caution that retrospective attribution can be a heuristic rather than a carefully reasoned judgement of institutional responsibility.

Table 3 reports a related CSDS item on TRS's decision not to merge with Congress after 2004, a strategically significant choice given that an earlier TRS-Congress alliance had existed. Among TRS voters specifically, 50 per cent regarded the decision not to merge as correct, versus only 9 per cent who regarded it as wrong, indicating that TRS's core electorate placed a premium on organisational and identity independence from the national party that had, on paper, delivered the state.

Table 3. Voter assessment of the TRS decision not to merge with Congress:

Assessment	All Telangana Respondents (%)	TRS Voters (%)
Right decision	27	50
Wrong decision	23	9
Cannot say	50	41

Source: CSDS-Lokniti pre-poll survey, Andhra Pradesh, 2014.

Taken together, Tables 1 through 3 support this paper's Stage 1 proposition (Section 2.6): the 2014 election was won predominantly on regional-identity legitimacy, with the TRS's organisational independence from national parties functioning as a credibility signal rather than an electoral liability, consistent with Riker's (1964) and Tillin's (2013) accounts of how successful statehood movements convert grievance into a durable, identity-anchored political vehicle.

6.2. The 2018 Election: Welfare Programmes and Performance Legitimacy:

The second general election was called nine months ahead of schedule: although Telangana's assembly elections were constitutionally due in May 2019 alongside the Lok Sabha election, caretaker Chief Minister KCR dissolved the assembly in September 2018, forcing an early poll.

Table 4. Telangana Legislative Assembly Election Result, 2018:

Party	Seats Contested	Seats Won	Vote (%)	Change from 2014 (%)	Vote (%) in Seats Contested
BJP	117	1	6.98	7.03	7.13
INC	99	19	28.34	25.02	34.54
TRS	119	88	46.87	34.04	47.09
TDP	13	2	3.51	14.55	30.25
AIMIM	8	7	2.71	3.71	47.11
NOTA	119	0	1.09	0.78	-
Others	1,465	2	10.59	-	-

Source: Election Commission of India (2018), *Telangana General Legislative Election Statistical Report*.

Table 4 reports the result. The TRS's vote share rose from 34.04 per cent in 2014 to 46.87 per cent, a gain of 12.86 percentage points, and its seat tally rose from 63 to 88. Congress increased its own vote share slightly, from 25.02 to 28.34 per cent, but lost 2 seats net; the TDP, having entered a Grand Alliance (Mahakutami) with Congress, collapsed from 14.55 to 3.51 per cent, losing roughly 11 vote-share points that appear, from the pattern of party-level gains and losses, to have flowed disproportionately to the TRS.

Whereas the 2014 result is best explained by regional-identity legitimacy (Section 6.1), the 2018 result is better explained by the welfare-delivery performance-legitimacy mechanism proposed in Section 2.2. Between the two elections, the TRS government introduced a dense package of targeted, individually branded welfare schemes: Rythu Bandhu (an unconditional per-acre investment support payment to landowning farmers), Rythu Bhima (farmer life insurance), Aasara pensions for the elderly, disabled, and widowed, Kalyana Lakshmi/Shadi Mubarak marriage-assistance grants, Mission Bhagiratha (piped drinking water), Mission Kakatiya (tank restoration), and Kanti Velugu (free eye care), alongside twenty-four-hour free agricultural electricity. The most electorally significant of these was the Rythu Bandhu scheme, which by the government's own account reached approximately 6.66 million identified farmer-beneficiaries regardless of landholding size, at a rate of ₹10,000 per acre per year (Government of Telangana scheme records, cited in Indian Express, 2017). CSDS pre-poll survey data indicate that 43.1 per cent of farming households reported directly benefiting from Rythu Bandhu, a level of attributable, individually verifiable benefit consistent with Chhibber and Nooruddin's (2004) finding that visible, attributable welfare delivery, rather than macroeconomic performance alone, drives incumbent reward.

Table 5 reports CSDS survey responses on perceived change in public service quality between 2014 and 2018. A clear majority of respondents reported improvement across every service category measured, most strikingly electricity supply (84.7 per cent reporting improvement) and road conditions (51.7 per cent).

Table 5. Voters' perceptions of change in public services, Telangana, 2014-018:

Service	Improved (%)	No Change (%)	Worsened (%)	No Response (%)	Total (%)
Condition of roads	51.7	19.9	26.4	2.0	100
Supply of electricity	84.7	4.8	9.2	1.3	100
Supply of drinking water	60.8	15.7	21.8	1.8	100
Condition of government hospitals	36.5	22.7	34.3	6.5	100
Condition of government schools	49.6	15.8	27.8	6.8	100

Source: CSDS pre-poll assembly election survey, Telangana, 2018. Note: the original survey instrument's second response category is here labelled 'No Change' for clarity; the underlying percentages are unaltered.

The 2018 result therefore supports this paper's Stage 2 proposition (Section 2.6): a TRS government facing its first re-election test converted regional-movement credibility into a governing coalition anchored in visible, individually attributable welfare delivery, precisely the mechanism Thachil (2014) and Kruks-Wisner (2018) describe as necessary for a young party to build a durable social base beyond its founding identity claim. It is notable that this shift occurred despite the TRS having already lost the Dubbaka and Huzurnagar by-elections and having failed to win the 2018 Greater Hyderabad Municipal Corporation election even after announcing further schemes such as Dalitha Bandhu, indicating that welfare-scheme announcement alone was not sufficient; it was verified, attributable delivery, as captured in the 43.1 per cent direct-beneficiary figure, that appears to have driven the 2018 assembly result specifically.

6.3. The 2023 Election: Anti-Incumbency, Retrospective Voting, and Manifesto Competition:

The 2023 Telangana Assembly election marked a turning point. After nearly a decade in office, the BRS (as the TRS was renamed in 2022) was defeated by Congress, which won 64 of 119 seats with 39.40 per cent of the vote, against BRS's 39 seats and 37.35 per cent (Table 6). The gap in vote share, under two percentage points, was far narrower than the 21-seat gap between the two parties, illustrating how India's first-past-the-post electoral system can convert a comparatively small swing in vote share into a decisive change of government (Cox, 1997; Riker, 1964).

Table 6. Telangana Legislative Assembly Election Result, 2023:

Party	Seats Contested	Seats Won	Votes Polled	Vote Share (%)
Indian National Congress (INC)	118	64	9,235,833	39.40
Bharat Rashtra Samithi (BRS)	119	39	8,753,956	37.35
Bharatiya Janata Party (BJP)	111	8	3,257,528	13.90
All India Majlis-e-Ittehadul Muslimeen (AIMIM)	9	7	519,379	2.22
Communist Party of India (CPI)	1	1	80,336	0.34
Bahujan Samaj Party (BSP)	107	0	321,074	1.37
All India Forward Bloc (AIFB)	41	0	146,130	0.62
Communist Party of India (Marxist) (CPI-M)	19	0	52,364	0.22
Jana Sena Party (JSP)	8	0	59,001	0.25
Other Parties & Independents	-	0	1,361,959	4.33
NOTA	-	-	171,953	0.73

Source: Election Commission of India (2023), Telangana Legislative Assembly Election results.

Both parties campaigned heavily on welfare policy, but the manifestos differed sharply in framing and scope, summarised in the comparative overview below. Following the manifesto-analysis approach of Budge et al. (2001) and Klingemann et al. (2006), the two documents can be read as competing claims to issue ownership (Petrocik, 1996) across six policy domains.

Table 7. Comparison of the 2023 Congress and BRS Manifestos:

Policy Area	Congress Manifesto	BRS Manifesto	Comparative Assessment
Core narrative	Change ('Marpu Kavali')	Continuity of development	Congress framed the election as requiring political change.
Welfare	Six Guarantees	Expansion of existing schemes	Congress promised larger, more immediate benefits.
Women	₹2,500/month, free bus travel, ₹500 LPG cylinder	LPG subsidy, existing schemes	Congress offered broader, more visible benefits targeting women.
Farmers	₹15,000 investment support, ₹12,000 farm-labour support, MSP commitments	Increased Rythu Bandhu assistance	Congress extended support beyond landowners to agricultural labourers.
Youth	Job calendar, government recruitment, unemployment support	Employment via development	Congress directly addressed unemployment and recruitment.
Social justice	Caste census, SC/ST/BC welfare, minority development	Continuation of existing programmes	Congress emphasised inclusion and representation.
Governance	Transparency, anti-corruption, accountability	Administrative continuity	Congress capitalised on anti-incumbency.

Sources; Both parties manifesto in 2023.

Two features of Table 7 are theoretically significant. First, on every policy domain, Congress's manifesto did not reject the welfare-populist template the TRS/BRS had itself established since 2018; it outbid it, offering larger and more broadly eligible benefits, particularly by extending farmer support to landless agricultural labourers and by consolidating multiple women-targeted transfers into a single, easily communicated 'Six Guarantees' package. This is consistent with this paper's Stage 2/Stage 3 transition logic (Section 2.6): once a welfare-delivery template has been established and normalised by an incumbent, challengers compete by extending rather than abandoning it, a dynamic also documented by Thachil (2014) in other Indian states. Second, the governance and youth-employment domains are where Congress's positioning diverges most sharply from continuity, aligning with Petrocik's (1996) issue-ownership logic: Congress concentrated its challenge on precisely those domains, recruitment delays, examination-paper leaks, and perceived administrative centralisation, where a decade-long incumbent is structurally most exposed to retrospective judgement (Fiorina, 1981; Healy & Malhotra, 2013), rather than attempting to contest welfare delivery, the domain on which the incumbent held the strongest issue-ownership advantage.

This pattern supports the paper's Stage 3 proposition (Section 2.6): after nearly a decade in office, the BRS's founding regional-identity advantage (Section 6.1) had receded in salience relative to accumulated governance grievances, chiefly unemployment, recruitment irregularities, and perceptions of centralised, unaccountable administration, and its welfare-delivery advantage (Section 6.2), while still substantial (reflected in its retained 37.35 per cent vote share), was no longer sufficient on its own to secure re-election once a credible challenger extended rather than contested the welfare template while additionally claiming the governance-accountability issue. The 2023 result is therefore best read not as evidence that regionalism or welfare politics ceased to matter in Telangana, but as evidence that retrospective governance accountability, the mechanism theorized by Downs (1957), Key (1966), and Fiorina (1981), had by 2023 become the marginal, decisive dimension of electoral competition, precisely as this paper's three-stage model predicts for a regional party a decade into incumbency.

VII. Discussion: Toward an Integrated Model of Regional Electoral Success:

The findings in Section 6 support the three-stage model of regional-party electoral consolidation proposed in Section 2.6, and in doing so suggest four propositions that extend beyond the Telangana case.

Proposition 1 (Sequential legitimacy substitution). A regional movement party's electoral coalition is not static but shifts in a predictable sequence, from identity-based legitimacy at its founding electoral test, to delivery-based performance legitimacy once in office, to governance-accountability legitimacy as incumbency lengthens. The Telangana data show this sequence unfolding within a single decade and two changes of government.

Proposition 2 (Welfare outbidding rather than welfare rejection). Where an incumbent has successfully established a welfare-delivery template, as the TRS/BRS did after 2018, a credible challenger is more likely to succeed by extending and broadening that template, as Congress did in 2023, than by rejecting it or proposing an alternative model of state-society relations. This is consistent with Thachil's (2014) and Krus-Wisner's (2018) accounts of welfare politics elsewhere in India and suggests that the welfare-populism critique reviewed in Section

2.5 understates the extent to which welfare competition, once established, becomes a durable equilibrium rather than a transient electoral tactic.

Proposition 3 (Issue ownership concentrates challenger strategy on incumbent weakness, not incumbent strength). Consistent with Petrocik's (1996) ownership theory, the successful 2023 Congress campaign did not attempt to outcompete the BRS on its strongest terrain, regional development credentials and welfare branding, but instead concentrated its challenge on governance and employment, the domains in which a decade-long incumbent was most exposed. This suggests that issue-ownership theory, developed primarily in two-party contexts, travels well to India's more fragmented, welfare-centred state party systems provided the analyst distinguishes an incumbent's areas of accumulated advantage from its areas of accumulated liability.

Proposition 4 (Narrow vote-share margins can mask large legitimacy shifts under first-past-the-post systems). The less-than-two-percentage-point gap in the 2023 popular vote, translating into a 21-seat gap in the assembly, illustrates a broader methodological caution for the study of Indian state elections: aggregate vote-share stability, or even modest incumbent vote-share retention, as the BRS's 37.35 per cent indicates, is compatible with a decisive change of government and should not be read as evidence that the underlying bases of electoral legitimacy remained unchanged (Cox, 1997).

These propositions are broadly consistent with, and extend, Rao and Harinath's (2024) analysis of the 2023 mandate, which similarly finds that the Congress campaign's success rested on effectively combining anti-incumbency messaging with credible, immediate welfare commitments, while BRS's emphasis on its development record alone proved insufficient once governance dissatisfaction had accumulated. The present paper's contribution is to situate that single-election finding within a longer, three-election sequence that shows the same underlying mechanism, identity-to-delivery-to-accountability substitution, operating consistently across a full decade of subnational political competition in a single state, and to propose that this sequence should be treated as a general model of regional-party electoral trajectory rather than as an artefact specific to Telangana.

VIII. Conclusion, Contributions, and Limitations:

This paper has argued that the TRS/BRS's rise and fall in Telangana between 2014 and 2023 cannot be adequately explained by regionalism, welfare politics, or anti-incumbency alone, but is best understood as a sequential process in which each of these three mechanisms became electorally dominant at a different, theoretically predictable stage of the party's transition from movement to government to entrenched incumbent. Regionalism explains the 2014 founding victory; targeted, attributable welfare delivery explains the 2018 re-election; and retrospective governance accountability, operating alongside a challenger's welfare-outbidding and targeted issue-ownership strategy, explains the narrow but decisive 2023 defeat.

The paper's principal contribution is theoretical: it integrates three literatures on Indian subnational politics, regionalism and party formation (Ziegfeld, 2016; Chandra, 2004; Chhibber & Kollman, 2004), welfare and clientelist accountability (Kitschelt & Wilkinson, 2007; Thachil, 2014; Kruks-Wisner, 2018), and retrospective voting and issue ownership (Fiorina, 1981; Petrocik, 1996; Healy & Malhotra, 2013), that are typically applied separately, into a single three-stage model of regional-party electoral consolidation and proposes that this model, rather than any one of its component literatures, offers the most complete account of the Telangana case and, potentially, of other Indian states in which regional or ethnic movement parties have converted movement credibility into sustained governing power, such as Tamil Nadu, Andhra Pradesh, and Odisha.

Several limitations qualify these conclusions. First, the paper relies on secondary electoral and survey data rather than an original panel survey, and cannot therefore establish individual-level causal identification between any single variable and vote choice; its conclusions are drawn from the triangulation of aggregate results, survey cross-tabulations, and documentary evidence rather than from a controlled empirical test. Second, the analysis is confined to a single state across three elections, which limits the external validity of the proposed three-stage model until it has been tested against comparable regional-party trajectories elsewhere in India, or in other federal democracies with strong subnational party systems. Third, CSDS-Lokniti survey samples, while methodologically robust, carry standard sampling and response-bias limitations common to all large-scale political surveys, and the 2023 manifesto comparison in Section 6.3 is based on a qualitative reading of publicly available manifesto documents rather than a fully quantified Comparative Manifestos Project coding. Future research could address these limitations by applying the three-stage model proposed here to other Indian regional parties using panel survey data, and by developing a quantified manifesto-coding comparison of welfare-outbidding strategies across multiple Indian state elections to test Proposition 2 more rigorously.

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