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REGIONAL PARTIES AS KINGMAKERS: BARGAINING POWER AND PORTFOLIO ALLOCATION IN NDA 3.0

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Abstract: The 2024 Lok Sabha election reduced the Bharatiya Janata Party to 240 seats, well short of a majority, and elevated two regional parties, the Telugu Desam Party and the Janata Dal (United), to a genuinely pivotal bargaining position within the National Democratic Alliance for the first time since 2014. This paper examines that bargaining relationship through the analytical lens of coalition theory, applying William Riker's concept of the minimum winning coalition and William Gamson's proposition that portfolio shares in a coalition government should be roughly proportional to the seat shares each partner contributes. Drawing on the composition of the Union Council of Ministers formed in June 2024 and the subsequent pattern of inter-party bargaining through 2025, the paper argues that portfolio allocation in Modi 3.0 has not followed simple proportionality: the Bharatiya Janata Party has retained every senior sovereignty-related portfolio, including Home Affairs, Finance, Defense, and External Affairs, while allocating to its two pivotal allies a set of sector-specific, distributive portfolios, such as Civil Aviation, Panchayati Raj, and Fisheries and Animal Husbandry, whose value to those parties lies chiefly in state-level patronage rather than influence over national policy. The paper further shows that a substantial share of the bargaining between the coalition partners has occurred outside the Cabinet altogether, through targeted fiscal packages for Andhra Pradesh and Bihar. It concludes that the kingmaker status of the Telugu Desam Party and the Janata Dal (United) has been real but carefully bounded, translated into distributive and fiscal concessions rather than a share in core executive authority.

***Key words*:** Coalition bargaining, Gamson's Law, Minimum winning coalition, Portfolio allocation, TDP, JDU, NDA, Modi 3.0, Regional parties, Distributive politics

Introduction

A political party is typically called a coalition kingmaker when its seats are crucial—meaning that removing them would strip the alliance of its parliamentary majority. However, kingmaker status does not automatically translate into influence; it must be negotiated through bargaining. In a parliamentary system, this bargaining primarily involves negotiating ministerial positions and, to a lesser extent, gaining fiscal and administrative advantages. This paper examines a more specific question than whether the Telugu Desam Party and the Janata Dal (United) are kingmakers in the post-2024 National Democratic Alliance—an agreement most agree upon—and instead investigates what kind of power their kingmaker position actually secures.

Theoretical framework

Two propositions from the comparative literature on coalition government guide this analysis. The first is William Riker's theory of the minimum winning coalition, which predicts that rational coalition-builders will seek to include only as many partners as are strictly necessary to secure a majority, since each additional partner dilutes the spoils available to be shared. The National Democratic Alliance after 2024, comprising more than a dozen parties, is considerably larger than the arithmetic minimum required for a majority, a pattern common in Indian coalition politics and generally explained by the value of building a buffer against the defection of any single partner, particularly when, as in this case, two individual partners are each large enough to be independently pivotal.

The second, and more directly applicable, proposition is Gamson's Law, formulated by William Gamson in 1961, which holds that in coalition bargaining, each party's share of the spoils of office, most commonly measured as its share of cabinet portfolios, tends to be proportional to the share of parliamentary seats it contributes to the coalition. Gamson's Law has substantial empirical support in the study of European coalition governments and provides a useful benchmark for measuring whether the Telugu Desam Party and the Janata Dal (United) have converted their pivotal status into a proportionate, disproportionately large, or disproportionately small share of governmental power. This paper argues that the relevant test cannot be conducted on the count of portfolios alone, since portfolios vary enormously in the executive authority and policy discretion they carry, and proposes instead a distinction between sovereignty portfolios, those bearing on national security, macroeconomic policy, and foreign affairs, and distributive portfolios, those whose principal value lies in the discretionary allocation of infrastructure spending, licenses, and welfare schemes to particular states and constituencies.

Objectives: This paper examines the seat arithmetic that gave the Telugu Desam Party and the Janata Dal (United) pivotal bargaining status after the 2024 election, analyses the actual allocation of ministerial portfolios in the Union Council of Ministers against the benchmark of Gamson's Law, distinguishing sovereignty from distributive portfolios, and examines the fiscal and extra-Cabinet concessions that have supplemented formal portfolio allocation as a further currency of coalition bargaining.

Scope of the study: The scope of this study is limited to bargaining between the Bharatiya Janata Party and its two most pivotal regional allies, the Telugu Desam Party and the Janata Dal (United), at the national level, between the formation of the Union Council of Ministers in June 2024 and early 2026. It does not provide a full account of every National Democratic Alliance constituent's portfolio allocation, nor of state-level coalition arrangements.

Methodology: The study relies on secondary sources, including published Union Council of Ministers portfolio allocations, Union Budget documents, and journalistic and scholarly analysis of coalition bargaining following the 2024 election, interpreted through the theoretical framework of minimum winning coalition theory and Gamson's Law.

The seat arithmetic of pivotality

The National Democratic Alliance secured 293 of 543 Lok Sabha seats in 2024, of which the Bharatiya Janata Party itself contributed 240, leaving a combined allied contribution of 53 seats. Within this allied contribution, the Telugu Desam Party's 16 seats and the Janata Dal (United)'s 12 seats were individually significant: the loss of either party's support alone would have reduced the National Democratic Alliance below the 272-seat threshold for a majority, a condition no other single ally could meet. This is the precise sense in which these two parties, and no other National Democratic Alliance constituent, may accurately be described as kingmakers after 2024, a position categorically different from that of smaller allies such as the Lok Jan shakti Party (Ram Vilas) or the Janata Dal (Secular), whose seats, while useful to the coalition's margin, were not individually decisive.

Portfolio allocation: testing proportionality

Sovereignty portfolios retained by the Bharatiya Janata Party

Notwithstanding its reduced seat share, the Bharatiya Janata Party retained, without exception, every portfolio conventionally regarded as central to sovereign executive authority in the June 2024 Council of Ministers: Home Affairs, Finance, Defense, External Affairs, and the position of Finance Minister overseeing the Union Budget remained with senior Bharatiya Janata Party leaders. No portfolio related to internal security, macroeconomic policy, or foreign relations was allocated to either the Telugu Desam Party or the Janata Dal (United), despite both parties' pivotal parliamentary position.

Distributive portfolios allocated to pivotal allies

By contrast, the portfolios allocated to the Telugu Desam Party and the Janata Dal (United) were drawn largely from a distributive category, where ministerial discretion translates directly into allocating infrastructure projects, licenses, and scheme benefits that can be targeted to states and constituencies. The Telugu Desam Party received the Ministry of Civil Aviation, a portfolio directly relevant to airport development in Andhra Pradesh, while the Janata Dal (United) received the Ministries of Panchayati Raj and Fisheries, Animal Husbandry and Dairying, portfolios whose schemes carry substantial rural distributive weight in Bihar.

Using Gamson's Law as a benchmark, the allocation is roughly proportional in the raw count of Cabinet seats compared to the number of seats contributed. However, when portfolios are weighted by their impact on sovereign policy authority, the Bharatiya Janata Party (BJP) retains a significantly larger share of sovereignty than its seat share alone would suggest under Gamson's Law. Conversely, its allies receive a larger share of distributive authority than a strict application of the law would predict. This pattern likely reflects a strategic coalition management approach: it allows allies to show visible benefits to their constituents while limiting their capacity to veto key areas like national security or macroeconomic policy, which are typically the domains a Prime Minister is reluctant to cede authority over, regardless of parliamentary support.

Bargaining beyond the Cabinet: fiscal packages as parallel currency

Much of the support given to the Telugu Desam Party and the Janata Dal (United) has occurred outside the Cabinet, mainly through targeted financial commitments in the Union Budget and multilateral funding. Andhra Pradesh received specific funds for developing its new capital, Amaravati, including externally supported loans, fulfilling a long-standing demand from the Telugu Desam Party linked to the state's 2014 bifurcation. Bihar obtained commitments for road, airport, and industrial corridor projects, as well as ongoing flood-management support, addressing the Janata Dal (United)'s demands. However, neither party received the more extensive demand—particularly in Bihar and Andhra Pradesh—for Special Category Status, which would have had more significant fiscal implications than project-specific aid. This pattern indicates a limited form of accommodation: concessions that are visible and politically beneficial to regional partners, without addressing the more systemic and precedent-setting demands that could reshape Centre-State fiscal relations or lead to similar claims from other states.

The institutional dimension: the Speaker question

Another aspect of bargaining power relates to institutional offices rather than executive roles. During government formation, reports indicated that the Telugu Desam Party and the Janata Dal (United) initially showed interest in becoming the Lok Sabha Speaker. This role holds independent authority over matters such as no-confidence motions and disqualification procedures under the anti-defection law, making it a position of power separate from ministerial portfolios. The Bharatiya Janata Party retained the Speaker's position, and the traditionally allied Deputy Speaker role—usually given to the main opposition—remained vacant for much of the eighteenth Lok Sabha. This vacancy was significant for parliamentary opposition's health but was distinct from the bargaining dynamics between the BJP and its allies discussed here.

Comparative reflection: kingmakers then and now

The role of regional parties as kingmakers within the National Democratic Alliance after 2024 can be compared to the coalition-building of 1996-1999, when the Bharatiya Janata Party first built a stable, multi-party alliance with around twenty-four groups by 1999. That earlier phase, explored in previous studies on Indian coalition politics, involved accommodating many small partners, none of which held individual sway, through a Common Minimum Programme aimed at bridging ideological gaps across the alliance. Today's arrangement is different: rather than dispersing bargaining power among many small parties, the 2024 setup centers decisive influence in two large regional parties, each capable of direct, bilateral negotiations with BJP leaders. This structural difference likely explains why the concessions since 2024 are highly specific and regional, rather than broad, programmatic compromises like those seen in 1999.

Findings

- The Telugu Desam Party and the Janata Dal (United) are pivotal in the strict sense that either party's exit would cost the National Democratic Alliance its Lok Sabha majority, a position not shared by any other constituent of the alliance.
- Portfolio allocation in June 2024 Council of Ministers is approximately proportionate to seat share when portfolios are counted without weighting, but the Bharatiya Janata Party has retained a disproportionate share of sovereignty-related portfolios, allocating to its pivotal allies' chiefly distributive portfolios with state-level patronage value.
- A substantial share of coalition bargaining has occurred outside the Cabinet, through state-specific fiscal packages for Andhra Pradesh and Bihar, while the more structurally significant demand for Special Category Status has not been conceded to either state.
- The Speaker's post and the vacant Deputy Speaker's post indicate that institutional office, beyond ministerial portfolios, has also been managed in a manner that preserves the Bharatiya Janata Party's procedural control of the Lok Sabha.
- The present bargaining pattern, concentrated in bilateral accommodation of two large, individually pivotal parties, differs structurally from the more diffuse, alliance-wide accommodation of many smaller partners that characterized the National Democratic Alliance's formation in 1999.

Conclusion:

The Telugu Desam Party and the Janata Dal (United) are, in the precise sense defined by their pivotal seat contribution, genuine kingmakers within the National Democratic Alliance formed after the 2024 election, a position neither party has occupied since the early 2000s. Yet the evidence examined in this paper suggests that this kingmaker status has purchased a carefully bounded form of power: substantial, visible, and politically valuable distributive and fiscal concessions targeted to their respective states, but no share whatsoever in the sovereignty portfolios that govern national security, macroeconomic policy, and foreign affairs, and no concession on the more structurally significant demand for Special Category Status. This pattern suggests that the Bharatiya Janata Party has managed its reduced parliamentary position by conceding the currency of coalition bargaining that is most visible to regional electorates while retaining, largely undiminished, the currency of coalition bargaining that matters most to the exercise of national executive authority. Whether this bounded accommodation remains sufficient to hold the coalition together through full term, or whether either pivotal ally eventually presses for a larger share of sovereign authority remains an open question for the remainder of this Lok Sabha's term.

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