

GAME THEORY ANALYSIS

# The Dravidian Endgame

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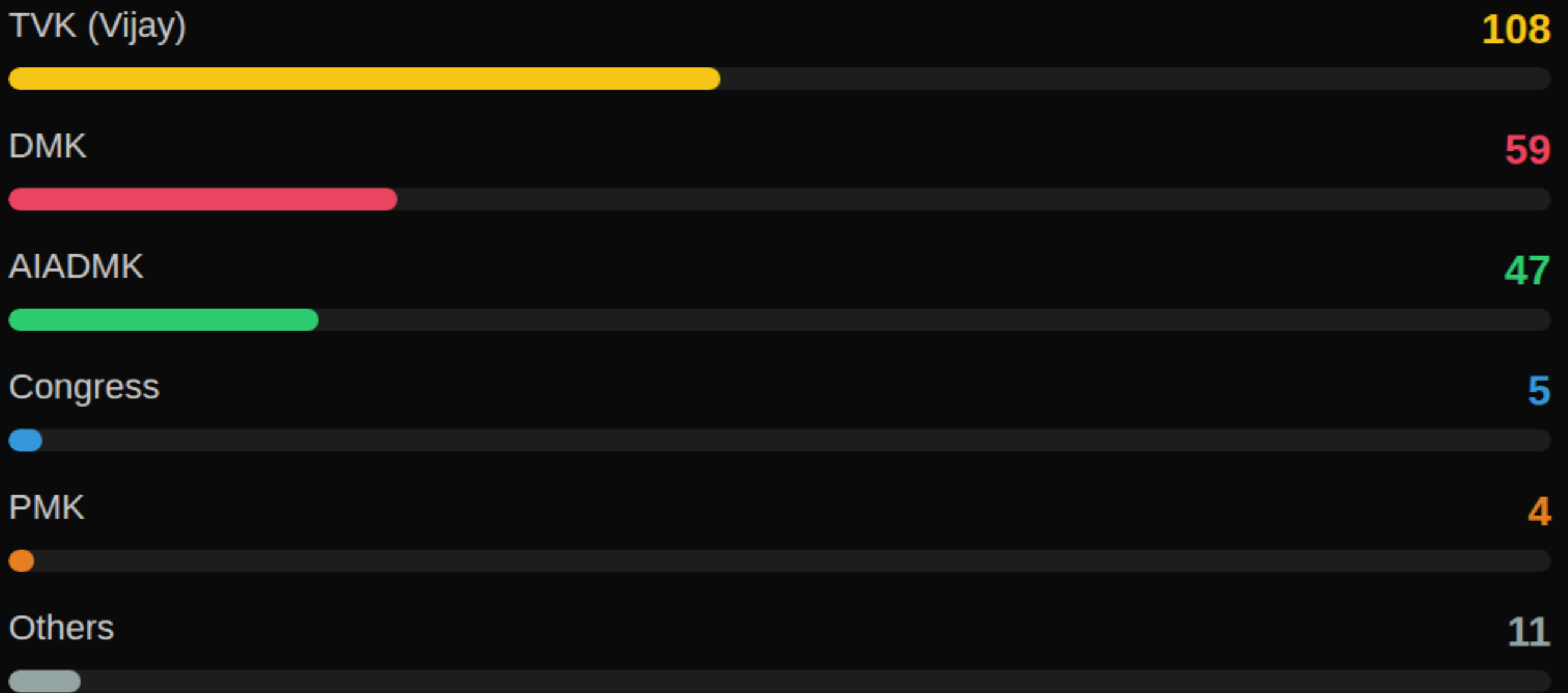
Tamil Nadu 2026 delivered a hung assembly for the first time in history. What does survival look like for the Dravidian parties?

SWIPE →

THE SCOREBOARD

# A shattered majority

234 seats · 118 needed · First hung assembly in TN history



**Vijay needs just 10 more seats.**

Congress has already announced support.

## HISTORICAL PATTERN

# The 30-year rule

Actor-politicians in Tamil Nadu don't just win elections.  
They colonize the political timeline.



1977–1987

## MGR era

10 unbroken years as CM



1991–2016

## Jayalithaa era

~14 years as CM across 6 terms



2026–2056?

## Vijay era?

~20 of 30 years?

*That leaves only ~10 years for both Dravidian parties combined.*

## GAME THEORY

# The prisoner's dilemma

DMK & AIADMK must choose: keep fighting each other, or cooperate against the newcomer?

### CURRENT PATH

#### Both fight

Vijay wins. Both parties slowly fade into irrelevance.

#### One cooperates

Attacker looks petty. Cooperator looks weak. Vijay still wins.

### RATIONAL MOVE

#### Both cooperate

106 combined seats. Block Vijay. Buy 30 years of relevance.

#### Do nothing

AIADMK extinct by 2031. DMK irrelevant by 2036.

# Terminal diagnosis

A party in freefall since the loss of its charismatic anchors.

**2016** ● **Jayalalithaa passes away**

Party loses its charismatic anchor

**2017–22** ● **EPS vs OPS leadership split**

Years of internal warfare

**2024** ● **Lok Sabha: Zero seats won**

Complete wipeout at the national level

**2026** ● **Assembly: Reduced to 47 seats**

Down from 66 in 2021, 130+ under Jaya

## Death spiral equilibrium

Losing power → cadre migration → further loss. The right-of-centre Dravidian space is now contested by TVK and BJP.

# The brand without a buyer

Less acute than AIADMK — but arguably more insidious.

## SIGNAL #1

### Stalin lost Kolathur

His own constituency of 15 years — to a former DMK man now with TVK. A costly signal that the leader's personal appeal has been breached.

## SIGNAL #2

### Two-front attack

TVK captures the 'change' narrative among youth. BJP erodes the 'governance' narrative in cities. DMK left as a commodity brand — respected but not chosen.

## SIGNAL #3

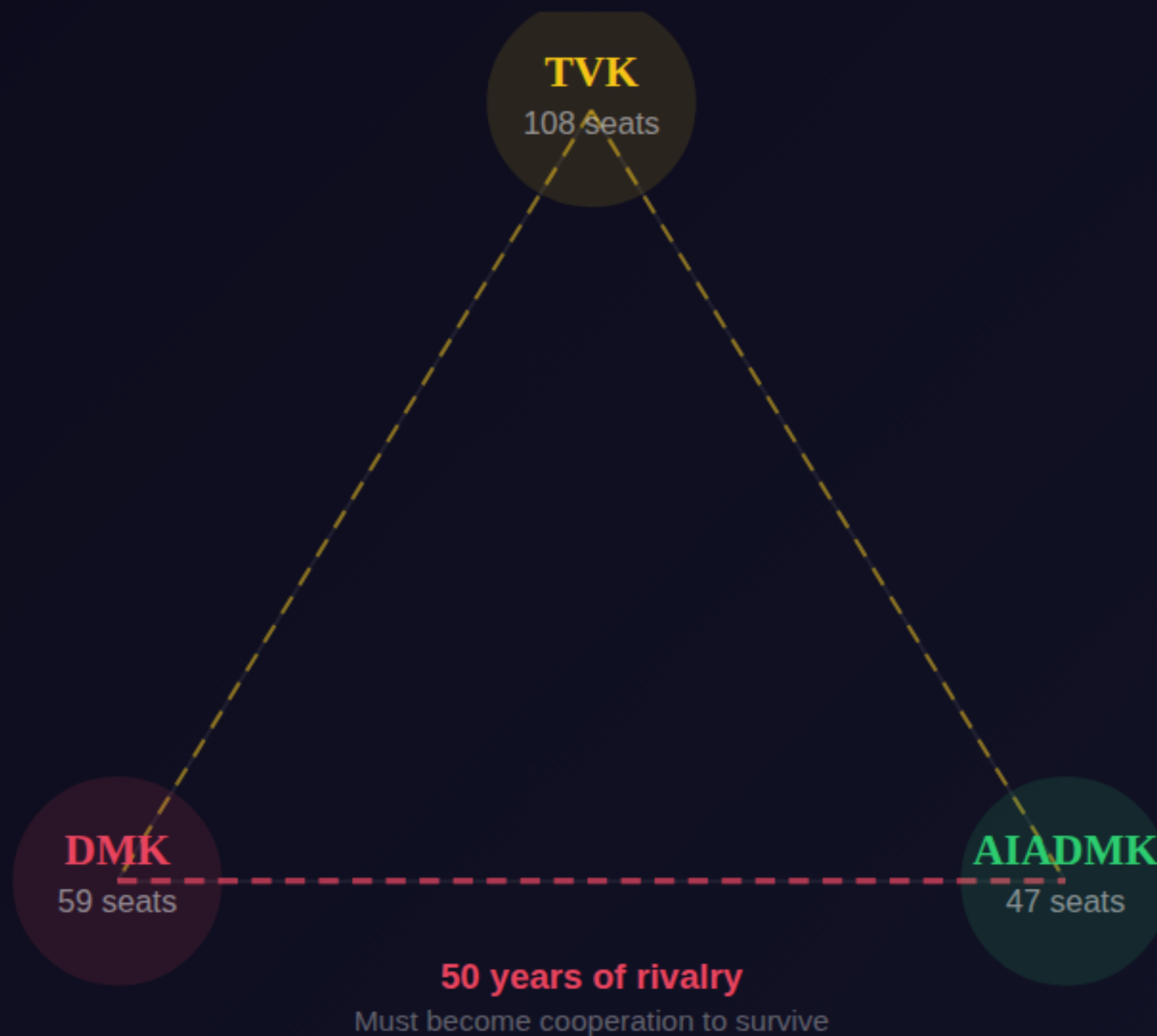
### Succession uncertainty

Udhayanidhi must build a leadership brand from opposition — while a new star occupies the CM chair. The luxury of time may not be available.

THE NEW GAME

# Three-player war

The old duopoly is dead. The game is now non-cooperative and three-sided.



SIGNALING THEORY

# The BJP's quiet game

1 seat. But the signal is louder than the scoreboard.

1

seat won in 2026

## Vote share

Rising steadily in urban Tamil Nadu

## Booth-level org

Building deep ground infrastructure

## Two-front war

Attacks DMK from the governance flank

## Long game

Doesn't need to win today — just signal tomorrow

*"A player's power isn't just in their current payoff — it's in their signaling capacity."*

## THE SOLUTION

# The cartel model

Three strategic options for Dravidian survival.

### 01 Blocking coalition

Use 106 combined seats to paralyze TVK governance. Control committees, stall budgets, force chaos.

*Risk: Requires sustained coordination between 50-year rivals*

### 02 Grand bargain

Non-aggression pact. Stop contesting each other's strongholds. Present a united Dravidian front.

*Risk: Requires visionary leadership neither party currently has*

### 03 The nuclear option

One party offers outside support to the other to form govt and keep TVK entirely out of power.

*Risk: Unprecedented. Ideologically jarring. But extinction is worse.*

THE FINAL CALCULATION

# 10 years or 30?

**10**

years of power



If Vijay rules.  
Fragmented. Intermittent.  
Not enough to sustain  
two party machines.

**30**

years of access



If Vijay is stopped.  
Full runway. Time to  
rebuild, rebrand,  
and survive.

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*"When the game changes from zero-sum to existential, old rivalries become luxury goods that rational players can no longer afford."*