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“Emerging Challenges and New Approaches in the Study of Elections and Campaigns”

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Professionalization of Political Communication in Developing Countries: Methodological Perspectives from India’s Election Campaigns¹

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How does one study a “social media election”? What does fieldwork during a “WhatsApp election” entail? Does researching a “data-driven campaign” demand new data collection techniques? Over the last decade, scholars of political communication in India have had to grapple with some of these questions as successive general elections in the country have come to be appended with prefixes (‘social media-’, ‘WhatsApp-’, ‘Big Data-’, ‘data-driven-’) that index the valence of technological innovations in the campaigning process. 3D hologram rallies, hashtag wars, deepfake videos, custom-made smartphone apps for party workers—in the last few years, the Indian electorate has seen it all. But, insofar as election campaigns in India have undergone a dramatic facelift, these technological gambits only represent the tip of the iceberg. In my forthcoming book, *The Backstage of Democracy: India’s Election Campaigns and The People Who Manage Them*, I argue that the rapid developments in the landscape of India’s political communication also represent the ascendant power of a new professional salariat class of technocrats who have emerged as the secret movers and shakers of political affairs (Sharma, 2024). Understanding India’s election campaigns, thus, demands studying shadowy actors like political consultants, spin doctors, pollsters, social media mercenaries, and ‘troll farm’ operators who increasingly provide services to political parties and politicians. Seen in this light, the task for contemporary scholars is not merely to ascertain how *visible* forms of political communication can be studied, but also how one might be able to analyze the *hidden*, behind-the-scenes organizational structure of modern election campaigns.

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To be sure, the phenomenon of the professionalization of politics is in no way limited to India. Since the early 2000s, scholars have predicted that the professionalization of political communication witnessed in North America and Western Europe represents the future of democratic politics writ large (Farrell, 1998; Mancini, 1999; Negrine, Holtz-Bacha, Mancini, & Papathanassopoulos, 2007). Although many of these teleological accounts were premature in predicting the demise of ‘retail’ forms of politics (Norris, 2000), which remain popular and prominent throughout the world (see Paget, 2019), there can be little doubt that much of the techniques and styles of political communication around the world are showing signs of convergence. Campaign professionals in different countries have been quick to identify and draw upon global best practices, which leads to an adaptive imitation in the style of campaigning from one country to another.

While campaign styles are converging, the research strategies of studying them may not see a similar pattern. This is because scholars embarking on the study of the professionalization of politics in developing countries face a unique set of methodological challenges that I believe has been insufficiently appreciated thus far. Critiques of ‘Western bias’ and calls for ‘decolonizing’ the study of political communication have already contributed to the conversation on how scholars should approach the study of politics in the developing world (Neyazi, 2023; Waisbord, 2023). However, the challenges that I refer to here are not epistemological (serious though those are), but relate to more mundane and pragmatic (but no less serious) questions of methodology and the attendant problems of evaluating the validity, credibility, and rigor of the research design. Simply put, the methodological choices that scholars in the Global North have hitherto adopted to study the professionalization of political communication may neither be possible nor desirable to replicate in the Global South in a straightforward fashion. This, in turn, has implications for comparative scholarship that seeks to integrate insights from both the Global South and the Global North.

Measuring Professionalization

Let me illustrate the aforementioned point through a brief example. One question that many scholars have been concerned with relates to measuring and comparing levels of professionalization across countries and/or across political parties within the same country. In this context, one approach has been forwarded by Gibson and Römmele (2009) who have created the CAMPROF index, which offers a standardized way of measuring and comparing the extent to which parties rely upon professionalized techniques of campaigning. Their 30-point index relies on evaluating whether a political party uses tools like telemarketing, public relations/media consultants, opinion polling, computerized databases, etc. Notwithstanding the considerable merit of such indices, operationalizing them remains dependent on the ability of scholars to collect adequate data on the inner life of campaign teams. This is made possible either through first-hand data collection (if direct access to intra-party activities can be secured)

or through reliable and verifiable second-hand information (such as that found in news media reports or grey literature produced by parties themselves). But it is precisely the difficulties associated with collecting either first-hand or second-hand data in developing countries that frustrates the attempt to study professionalization through indices such as the CAMPROF. This is where the structural factors of politics in developing countries come in.

Political parties in the Global South tend to be characterized by poor levels of institutionalization and weak organizational structure (Kitschelt & Wilkinson, 2009). One implication of this is that decision-making within parties tends to be controlled by a very narrow segment of political elites and there is a generalized absence of transparency in how intra-party affairs are conducted. In the absence of genuine intra-party democracy, it has been noted that party bosses in India have tended to nominate those candidates who can self-finance their own campaigns (Sircar, 2018). In such scenarios, the real locus of campaigning is not solely at the level of the national/regional party headquarters. Rather, each candidate tends to operate an individual and dispersed campaign and many innovative aspects of campaigning communication are to be observed at the constituency level. What, then, is the appropriate level of analysis at which an index such as CAMPROF may be constructed in India? How can we aggregate individual constituency-level campaigns to produce a picture of professionalization at the level of the party?

Another implication of the weak and oligarchic organizational structure is that the institutional memory within political parties has become severely limited and there is a dearth of archival records that helps scholars study the longitudinal evolution of campaign strategies. For instance, in my research on the historical roots of professionalization in Indian politics, after a painstaking perusal of an eclectic range of documentary sources, I was startled to find evidence that indicated that as early as the 1980s the Indian National Congress (INC, the grand old party of India's independence and currently the largest national-level opposition party) was adopting techniques that one might associate with high-levels of professionalization as measured by CAMPROF index (Sharma, 2022). In the lead-up to the 1984 General Election, the INC had embarked on a radical program of combining large scale data gathering, using advertising professionals, opinion polls, and computerized decision making. Some of these claims were readily verifiable—for example, the work done by advertising professionals for the Congress party was evidenced by the flurry of political advertisements that appeared in different newspapers of that period. On some of the other questions, such as claims that the selection of candidates was done based on 'objective' computerized analysis, it was harder to verify the details. It was interesting to note that accounts of these incipient experiments with professionalization were nowhere to be found in the annual reports produced by the Congress party itself. Rather, to reconstruct these developments in political communication I had to rely on extremely brief and fleeting reportage in periodicals and then triangulate them with oral history interviews and memoirs written by Congress politicians decades after these events transpired.

Because political parties in developing countries operate in an environment marked by a lack of transparency, this has prevented the development of a research culture where all scholars could access and observe intra-party activities on a fair and equitable basis. Instead, it becomes nearly impossible to negotiate access without leveraging personal connections or *quid pro quo* favors. Scholars based in ‘reputable’ universities of the Global North also tend to have an advantage in obtaining access. The ability to conduct first-hand fieldwork remains critical because news reports on professionalized campaigning are usually pitched in grandiloquent terms, which makes it difficult to sift fact from hyperbole.

This realization became apparent more recently when conducting fieldwork in the run-up to the 2024 Indian General Election. Many media reports have noted that in this election, all political parties are investing considerable sums in state-of-the-art ‘war rooms’ for campaign coordination and that ‘artificial intelligence’ and ‘big data’ is set to play a massive role (Raj, 2024; Sundaram, 2024). There is much evidence to indicate that the Bharatiya Janata Party has built up the organizational capacity to undertake such a venture (Christopher, 2020; Singh, 2019; Ullekh, 2015). But, upon visiting the headquarters of another leading political party in New Delhi, I found that their much vaunted ‘war room’ was little more than a ramshackle conference room where a team of a dozen volunteers congregated to telephone booth-level workers and obtain brief updates on the ground-level campaign. This emphasized to me, how misleading it can be to use secondary sources on campaigning in the absence of quality control and the uneven results this produces. In such a situation, the parsimony offered by indices like CAMPROF obscures more than it reveals about the pattern of professionalization in countries like India.

The Qualitative Challenge

Prima facie, it might appear that the problem at hand could be solved by selecting a suitable qualitative research design instead of relying on a quantitative index. Perhaps an ethnographic approach (see for instance, Banerjee, 2014)—with emphasis on immersion, holism, and in-depth and contextualized study of a small number of cases—can allow us to study the professionalization of campaigning in developing countries more comprehensively? While there are some advantages that a qualitative design can offer, here too, the solution is far from straightforward. The problem of securing access to political elites that I noted above also remains salient when relying on elite interviews or participant observation. Above all, however, the unique spatial and temporal properties of election campaigns in an era of professionalization demand that qualitative approaches also need to be rethought to suit our analytical purpose.

Firstly, the widely dispersed and fragmented nature of a professionalized election campaign upsets the geographic parameters that usually makes qualitative data collection feasible. For instance, these days in any given Indian election, a political party’s campaign personnel are

likely to be split across, inter alia, a central headquarters (often dubbed as the ‘war room’) that is managed by the senior party bosses, specialized cells devoted to social media and data analytics, independent constituency level campaign teams run by candidates, get-out-the-vote campaigns being organized by polling-booth-level workers, employees of political consulting firms and pollsters spread throughout key constituencies, social media influencers based in different parts of the country, and other petty vendors managing various aspects of publicity and promotion. The geographic dispersion of modern campaigns is staggering. Some scholars have rightly problematized the valorization of ‘place’ and being present in the ‘field’ as uncritical standards of ethnographic richness (Gupta & Ferguson, 1997a, 1997b). Nevertheless, wanting to study the professionalization of election campaigns ethnographically raises a difficult question about selecting the appropriate site that can help provide a birds-eye view of the different moving parts of the campaign. Unlike a traditional multi-sited ethnography where scholars can follow the movement of a person, commodity, or information from one location to another, what we require here is a way of studying the geographically dispersed components of a campaign that are being executed *simultaneously* at any given moment.

Secondly, related to the question of location are the dynamics of duration. Long-term immersion in a field site has often been considered the key that helps unlock participant observation’s ability to yield rich empirical insights and produce holistic descriptions. However, as modern election campaigns operate in a ‘permanent campaign’ mode (Dulio & Towner, 2009), their start and end points have become progressively fuzzy, which makes it difficult to optimally plan the time frame of a research project. Furthermore, it is exceedingly rare to find campaign professionals in India who remain tied to a single party or politician for long. Most of the professionals who provide substantive inputs have an exceedingly limited association with the world of politics—the contribution to campaigns can take place over time spans as short as a few days to just a few weeks (Sharma, 2024). How are scholars to identify such fleeting actors and what does building long-term trust in such a dynamic landscape mean?

Thirdly, qualitative researchers are also confronted with the limits of conducting participant (or non-participant) observation in campaign teams that are practicing ethically problematic tactics such as spreading disinformation or employing deepfakes. Here, again, research in developing countries poses a unique problem, since there is a general absence of substantive regulatory oversight over campaign practices, while data protection laws remain weak or simply non-existent, thereby opening ample opportunities for malpractices and offenses. In such contexts, scholars cannot be guided by the local country’s legal code to ascertain the ethically permissible boundaries of their own fieldwork. University ethics review boards (especially those located in the Global North) may also fail to provide adequate guidance on such matters.

I raise these questions here not to offer a ready-made prescriptive answer of my own, but rather in the hopes of building an appreciation of the uncertain terrain that scholars studying the Global South find themselves in. Rigor in qualitative research has often been determined by a

scholar's immersive familiarity in a field site, the holism of their empirical analysis, the contextual granularity of their findings, inductive theorizing, and the ethical considerations they bring to bear on their object of study. While there is no reason to dismiss these values as the benchmarks of good scholarship, what holism, immersion, and ethical negotiations mean when studying a professionalized campaign is still in the process of revealing itself.

Conclusion

The discussion above should make clear that the challenges of studying professionalized election campaigns in the developing world are not about adjudicating between quantitative versus qualitative methods, parsimonious indices versus in-depth descriptions, or large-N versus small-N approaches. It is the unique structural conditions of politics in developing countries that requires us to go back to the methodological drawing board. Unlike in advanced industrial democracies, the absence of organizational coherence in political parties means that the unit and site of analysis to study political communication is far from obvious. The lack of transparency and regulatory oversight in how parties operate and their ad-hoc policies of granting access to academic researchers also have a bearing on what data can be collected, how, and under what terms. The upshot of this discussion is that research emerging from the Global South is likely to deviate from established models and paradigms and its methodological choices will appear messier and more chaotic (Badr, 2023)—a necessary result of data collection that is characterized by serendipity than clear sampling, contingent access than coherent planning. The risk here, then, is that comparative research on election campaigns will omit or under-represent perspectives from the Global South—not because of an inherent bias or epistemological blinkers, but because country case studies that deploy divergent methodologies, data sources, and descriptive styles are often perceived to be incompatible for comparison in the current landscape of academic publishing and research funding. In addition to the call for decolonization and methodological pluralism in the field of political communication, there remains the need to accept some degree of incommensurability in how political communication may be studied in different parts of the world.

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